



## Installation and Upgrade Guide





**Note**

Before using this information and the product it supports, read the information in "Notices" on page 23.

This edition applies to version 5.0.3 of IBM FileNet eForms Designer for Windows (product number 5724-R85) and to all subsequent releases and modifications until otherwise indicated in new editions.

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## About this document

This guide provides instructions for installing and upgrading IBM FileNet eForms Designer to the current released version. Be aware that each release of a FileNet P8 component or expansion product can have multiple software updates available in the form of service packs, fix packs, and/or interim fixes, each with potentially different dependencies and installation requirements.

## Typographical conventions

This document uses the following typographical conventions:

| Convention       | Usage                                       | Example   |
|------------------|---|---|
| <b>Bold</b>      | Platform-specific headings                  | Start the application server.<br><b>WebSphere</b><br>Refer to IBM WebSphere documentation for more information.<br><b>WebLogic</b><br>Refer to BEA WebLogic documentation for more information. |
| <b>Gray bold</b> | Clickable items, such buttons, and tabs.    | Click <b>OK</b> .   |
|                  | Menu paths or breadcrumb trails.            | Select <b>Start &gt; Settings &gt; Control Panels &gt; Display &gt; Screen Saver</b> .  |
| <i>Italics</i>   | Variables that require user-supplied values | The calculation is: <i>number of object stores * 16 + number of concurrent users</i> .  |
|                  | Document titles                             | You are reading the <i>IBM FileNet P8 Platform Installation and Upgrade Guide</i> .   |

| Convention                  | Usage   | Example   |
|-----------------------------|---|---|
| Monospace                   | Text that has to be typed by the user   | Copy the file by entering the following command:<br><code>COPY filename</code>  |
|                             | Code samples  | Find the following text in the web.xml file:<br><code>&lt;context-param&gt;&lt;param-name&gt;uploadDir&lt;/param-name&gt;&lt;param-value&gt;/opt/FileNet/AE/Upload1&lt;/param-value&gt; &lt;/context-param&gt;</code> |
|                             | Display text, such as prompts and error messages  | Are you sure you want to delete this object?<br>You do not have permission to delete this object.   |
|                             | Elements such as filenames, properties, classes and so on, whose meaning might get confused in regular text.    | Open the <code>filed</code> file.<br>Enter a value for the <code>new</code> property.<br>Select the <code>senior</code> class.  |
| “Text with quotation marks” | User-interface fields that do not use initial capitalization and document headings referenced within a document | See the “Part number” field for the part number.<br>For more information, see <a href="#">“Typographical conventions” on page 6</a> .   |
| UPPERCASE                   | Case-sensitive text, where uppercase text is required.  | Copy the file by entering the following command:<br><code>COPY filename</code>  |

## About IBM FileNet documentation

Newer versions of *IBM FileNet P8* documentation are sometimes re-released with other events, such as fix pack releases or documentation refreshes. To ensure that you have the latest revision of a document, compare the document part number of your document to the document part number of the document that is posted on the support Web site:

[www.ibm.com/support/docview.wss?rs=3278&uid=swg27010422](http://www.ibm.com/support/docview.wss?rs=3278&uid=swg27010422)

For example, the last two digits of “GC31-5585-05” indicate that the specified document has been revised five times after the original publishing, which is designated by 00.

### Links to additional information

To help you locate additional information about a topic, this document includes links to:

- Other locations in this document
- External Web sites
- Topics in the FileNet P8 help system

### Gather reference documentation

Following are two tables with information about the IBM FileNet P8 documents that are available as part of the FileNet P8 release. To download these documents from the IBM FileNet support Web site, see “[Access IBM FileNet documentation, compatibility matrices, and fix packs](#)” on page 11.

#### Installation reference documents

Consider having one or more of the following documents (or help topics) nearby for reference purposes during the installation of IBM FileNet P8 Platform.

| Document or help topic name...                                 | Refer to this document...  |
|--|--|
| <i>Plan and Prepare Your Environment for IBM FileNet P8</i>    | To confirm the target environment is ready for a FileNet P8 installation or upgrade.   |
| <i>IBM FileNet Workplace XT Installation and Upgrade Guide</i> | For information about how to install and upgrade Workplace XT in a FileNet P8 environment.   |
| <i>IBM FileNet P8 Hardware and Software Requirements</i>       | To confirm that the target environment has at least the minimum supported levels of software from independent software providers.  |
| <i>IBM FileNet P8 Compatibility Matrix</i>                     | To confirm that the version of FileNet P8 to be installed is compatible with at least the minimum supported levels of other FileNet products that are or will be used with FileNet P8. |
| <i>IBM FileNet P8 Release Notes</i>                            | To familiarize yourself with the new features and known issues associated with the FileNet P8 release.   |

| Document or help topic name...  | Refer to this document...  |
|---|--|
| <i>IBM FileNet P8 Non-English Support Guide</i>   | For information about how FileNet P8 supports non-English environments.  |
| <i>IBM FileNet P8 High Availability Technical Notice</i>  | For information about how to set up FileNet P8 using clusters, farms and other high-availability software and hardware.  |
| <i>IBM FileNet P8 Performance Tuning Guide</i>  | For critical tuning information required to make deployments of all sizes and levels of complexity work efficiently before going into production.<br><br><b>Attention</b> This guide provides many specific recommendations for making performance-related choices that are either difficult or impossible to change once the system goes into production. |
| <i>IBM FileNet P8 Troubleshooting Guide</i>   | For troubleshooting tips associated with a FileNet P8 Installation.  |
| <i>IBM FileNet P8 help topic:</i><br><b>Administration &gt; Enterprise-wide Administration &gt; FileNet P8 Security &gt; Users and Groups</b> | For a complete list of the user and group roles, accounts, and responsibilities required to install, configure, and maintain a FileNet P8 system.  |
| <i>IBM FileNet P8 help topic:</i><br><b>Administration &gt; Enterprise-wide Administration &gt; Shutdown and Startup</b>                      | For information about how to shut down and start up FileNet P8 and any expansion products.   |

## Other available documentation

Review the list of remaining FileNet P8 documents that you can download from the FileNet support Web site.

| Document name  | Refer to this document...   |
|--|---|
| <i>IBM FileNet P8 System Overview</i>                                      | For a technical summary of the FileNet P8 architecture, including a overview of features and capabilities.  |
| <i>IBM FileNet P8 Disaster Recovery Technical Notice</i>                   | For information about potential options and solutions involved in a FileNet P8 disaster recovery plan.  |
| <i>IBM FileNet P8 Process Task Manager Advanced Usage Technical Notice</i> | For information about properties found under the <b>Advanced</b> tab in Process Task Manager.   |
| <i>IBM FileNet P8 Version Tools Technical Notice</i>                       | For information about the set of versions tools that are installed with FileNet P8 Platform and that identify the levels of Application Engine, Content Engine, and Process Engine in a FileNet P8 environment. |

| <b>Document name</b>   | <b>Refer to this document...</b>   |
|--|--|
| <i>IBM FileNet P8 Security Help Extract</i>  | For security-related information from the FileNet P8 help system in PDF format.  |
| <i>IBM FileNet P8 Rendition Engine Installation and Upgrade document</i>                                     | For information about how to install and upgrade Rendition Engine in a FileNet P8 environment.   |
| <i>IBM FileNet P8 eForms Installation and Upgrade Guide</i>  | For information about how to install and upgrade eForms in a FileNet P8 environment.   |
| <i>IBM FileNet Connector for SharePoint Web Parts Installation and Upgrade Guide</i>                         | For information about how to install and upgrade IBM FileNet Connectors for SharePoint Web Parts in a FileNet P8 environment.          |
| <i>IBM FileNet Connector for SharePoint Document Libraries Installation and Upgrade Guide</i>                | For information about how to install and upgrade IBM FileNet Connectors for SharePoint Document Libraries in a FileNet P8 environment. |
| <i>IBM FileNet P8 Portlets for WebSphere Installation and Upgrade Guide</i>                                  | For information about how to install and upgrade FileNet P8 Portlets for WebSphere in a FileNet P8 environment.                        |
| <i>IBM FileNet Process Analyzer Installation and Upgrade Guide</i>   | For information about how to install and upgrade Process Analyzer in a FileNet P8 environment.   |
| <i>IBM FileNet Process Simulator Installation and Upgrade Guide</i>  | For information about how to install and upgrade Process Simulator in a FileNet P8 environment.  |
| <i>IBM FileNet Records Manager Installation and Upgrade Guide</i>  | For information about how to install and upgrade Records Manager in a FileNet P8 environment.  |
| <i>IBM FileNet Business Activity Monitor Installation and Configuration Guide</i>                            | For information about how to install and configure Business Activity Monitor in a FileNet P8 environment.                              |
| <i>IBM FileNet Content Federation Services Installation and Upgrade Guide</i>                                | For information about how to install and upgrade Content Federation Services in a FileNet P8 environment.                              |
| <i>IBM FileNet Content Federation Services for Image Services Planning and Configuration Guide</i>           | For information about how to configure Image Services for document federation.   |
| <i>IBM FileNet Content Federation Services for Content Manager OnDemand Planning and Configuration Guide</i> | For information about how to configure Content Manager for OnDemand for document federation.   |
| <i>IBM FileNet Content Management Widgets Installation Guide</i>   | For information about how to install Content Management Widgets in a FileNet P8 environment.   |

## ***Access IBM FileNet documentation, compatibility matrices, and fix packs***

To access documentation, compatibility matrices, and fix packs for IBM FileNet products:

1. Navigate to the Product Documentation for FileNet P8 Platform support page.  
(<http://www.ibm.com/support/docview.wss?rs=3247&uid=swg27010422>).
2. Select a PDF or a Doc Link, whichever is appropriate.

## **Customer support**

For information about contacting customer support:

1. Navigate to the FileNet Product Family support page:  
(<http://www-01.ibm.com/software/data/content-management/filenet-product-family/support.html>).
2. Click **IBM FileNet Support Communications**, or search for a particular support topic under “Enter search terms”.

## ***Feedback***

Your feedback helps us to provide quality information. Send your comments about this publication or any other IBM FileNet documentation by e-mail to [comments@us.ibm.com](mailto:comments@us.ibm.com). Be sure to include the name of the product, the version number of the product, and the name and part number of the book (if applicable). If you are commenting on specific text, include the location of the text (for example, a chapter and section title, a table number, a page number, or a help topic title).

## *About eForms Designer for Windows*

IBM FileNet eForms Designer is used to design forms for use with the following products:

- FileNet P8 eForms
- FileNet Forms Manager
- FileNet eForms for Open Client
- FileNet eForms for Web Services

Each of the products listed above has a related fill platform in eForms Designer. This allows the application to change its design environment based on the features that are supported for that platform. On Windows®, when you install the software, you can specify the fill platform that you want as the default. The fill platforms are as follows:

- Desktop eForms
- Forms Manager eForms
- Open Client eForms
- P8 eForms
- Web Services eForms

You can change the fill platform at any time using the **Preferences** command in eForms Designer. Please see the eForms Designer help for more information.

## Upgrading

When you install eForms Designer the versions of the products that are listed below are upgraded. Template folders for these versions are preserved in their existing locations.

- eForms Designer 4.x or later.
- Forms Designer 4.x or later.

**NOTE** If Informed Designer 3.5 is installed on your machine, you must remove it before you can install eForms Designer 5.0.3. To remove Informed Designer 3.5, click **start** on the Task bar and then select **Control Panel > Add or Remove Programs > Informed**. Then click **Remove**.

# Documentation

## *Installation Guide*

In this installation guide, you'll find the following information and instructions:

- A planning section with links to the system requirements.
- Instructions for installing eForms Designer for Windows.

## *Documents available on the Start Menu*

After installation, the following documentation is available on the **Start > Program Files > FileNet > eForms** menu:

- *Tutorials and Samples* folder: Includes tutorials for use with Workplace, Open Client and Web Services, and Forms Manager.

## *Additional documents available in the Installation package*

The *Supplementary Documentation* folder has sub-folders that contain documents for use with the following fill platforms:

- Forms Manager eForms.
- Open Client eForms.
- Web Services eForms.

The following documentation is provided in the *Supplementary Documentation* folder:

- *doc\_readme.htm*: Describes the contents of the *Supplementary Documentation* folder.
- *Use with Forms Manager* folder: Includes the *API Syntax* guide.
- *Use with Open Client* folder: Includes the *Workflow Author's Guide to IBM FileNet eForms Open Client* (versions 5.0.x and 5.1.0).
- *Use with Web Services* folder: Includes the *Content Services and IBM FileNet eForms Designer* guide, the *Content Services and eForms Filler (Web)* guide, and the *Workflow Author's Guide for IBM FileNet eForms for IBM FileNet Web Services*.

## *Plan the installation or upgrade*

Before you install eForms Designer:

- To ensure that eForms Designer supports the GB18030 character set, install the GB18030 Support Package on the machine that you install eForms Designer on. You can locate the package by searching for “GB18030 Support Package” at [www.microsoft.com/downloads](http://www.microsoft.com/downloads).
- If your organization uses the Extended MAPI mail service, you must select the Custom Install option. See “[Custom Installation](#)” on page 20 for information.
- The application integration core module for Application Engine or Workplace XT is no longer installed by the eForms Designer installer. To enable Office Integration, you must access your Application Engine or Workplace XT and install it. For more details, see *IBM FileNet P8 help* topic: **System Administration > Application Engine and Workplace XT Administration > Workplace Administration > General Author tools > Download Application Integration for Microsoft Office.**

## Installation and upgrade tasks

### To install eForms Designer

---

1. Ensure that you have administrator rights for the machine on which you are installing.
2. Review the hardware and software requirements, see [Task 1 on page 17](#).
3. Install or upgrade eForms Designer, see [Task 2 on page 18](#).

## Task 1: Review the FileNet eForms Designer Hardware and Software Requirements

Review the list of IBM FileNet P8 Platform releases and their associated dependencies in the IBM FileNet Compatibility Matrix on the Information Management support page ([www.ibm.com/software/data/support/](http://www.ibm.com/software/data/support/)). For details on how to find this information, see “[Access IBM FileNet documentation, compatibility matrices, and fix packs](#)” on page 11.

## Task 2: Install eForms Designer for Windows

It's recommended that you exit all Windows programs before you install eForms Designer.

The eForms Designer installer is distributed in the following formats.

- Single file executable (eFormsDesignerSetup.exe): Used for distribution via a web site. Contains the installation packaged in one file.
- Single file MSI package (eFormsDesignerSetup.msi): Used for distribution through an automated installation system such as Microsoft SMS. Contains the installation packaged in an MSI file. For this installation to work, the InstallShield Script Engine (ISScript11.Msi) must already be installed on the destination computer.

Two installation options are available: **Complete** and **Custom**. If you select **Complete**, the installer application automatically installs the following standard program features:

- The eForms Designer application.
- All eForms plug-ins.
- Spell-checker and online Help

If you're an advanced user or a system administrator, and you want to choose which features to install and where to install them, or if you wish to install the Extended MAPI mail service, select **Custom**.

### To install or upgrade eForms Designer

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1. Access the host machine and log on using an account that has administrator privileges.
2. (Optional) If Desktop eForms version 4.x or earlier is installed, you must upgrade to the newest version before upgrading eForms Designer. Access your Application Engine or Workplace XT General Author tools section and download Offline Forms Integration. For more details, see *IBM FileNet P8 help* topic: **System Administration > Application Engine and Workplace XT Administration > Workplace Administration > General Author tools > Download Offline Forms Integration**.
3. From the FileNet eForms Designer for Windows installation package, execute the appropriate eForms designer installation program for your configuration. Follow the instructions in the wizard and in the table below.

### NOTES

- You can install eForms Designer using the Complete or Custom option. Follow the instructions in the tables below that apply to the option you select.
- For users to sign forms using Microsoft CSP, they must have the CapiCom.dll version 2.1x or later installed on their workstations. Users can go to [www.microsoft.com](http://www.microsoft.com), search for "capiCom.dll," and download the file.

**Table 1: Complete Installation**

|                              | <b>Perform the following action...</b>  |
|------------------------------|---|
| Welcome                      | Click <b>Next</b> in the Welcome window to proceed with the installation.   |
| Software License Agreement   | Read the Software License Agreement and click <b>I accept the terms in the license agreement</b> . You must accept the terms of the license agreement to proceed with the installation. Click <b>Next</b> . |
| Customer Information         | Fill in your user name and organization and select the usage option you need. Click <b>Next</b> .   |
| SetupType                    | Select <b>Complete</b> . Click <b>Next</b> .  |
| Target Platform              | Select the platform for which you will most often design forms (the default fill platform). The functionality that is displayed in the interface is controlled by this setting. Click <b>Next</b> .         |
| Ready to Install the Program | Click <b>Install</b> . After installation, a message appears informing you that the installation was successful. Click <b>Finish</b> to quit the installer.   |

**Table 2: Custom Installation**

|                      | Perform the following action...   |
|----------------------|---|
| Welcome              | Click <b>Next</b> in the Welcome window to proceed with the installation.   |
| License Agreement    | Read the Software License Agreement and click <b>I accept the terms in the license agreement</b> . You must accept the terms of the license agreement to proceed with the installation. Click <b>Next</b> .   |
| Customer Information | Fill in your user name and organization and select the usage option you need. Click <b>Next</b> .   |
| SetupType            | Select <b>Custom</b> . Click <b>Next</b> .  |
| Custom Setup         | <p>Click a feature's icon to view a drop-down list of installation options for that feature. For information about a feature, click its name. You'll see a description of the feature on the right side of the screen.</p> <p>A list of the available fill platforms is provided under the Target Platforms heading. The functionality that's displayed in the eForms Designer interface is controlled by the platforms you select. To remove a fill platform from the installation, click the name of the platform (e.g., P8 eForms) and choose "This feature will not be available." Click <b>Next</b>.</p> <p>If you want to change the application's default destination folder, click <b>Change</b> and navigate to the destination you want. Click <b>OK</b> when the correct path is displayed in the Folder name field.</p> <p>To view custom setup tips, click <b>Help</b> at the bottom of the screen. You can view disk space requirements by clicking <b>Space</b>.</p> <p>Click <b>Next</b>.</p> |

**Table 2: Custom Installation (continued)**

|                                | Perform the following action...   |
|--------------------------------|---|
| Select Default Target Platform | Select the platform for which you will most often design forms (the default fill platform). If you disabled the installation for one or more platforms on the previous page, the checkboxes for those platforms are not available here. Click <b>Next</b> . |
| Ready to Install the Program   | Click <b>Install</b> . After installation, a message appears informing you that the installation was successful. Click <b>Finish</b> to quit the installer.   |

- (Optional) If you use application integration, you must access the tools section of your Application Engine or Workplace for XT to install Office Integration. For more details, see *IBM FileNet P8 help* topic: **System Administration > Application Engine and Workplace XT Administration > Workplace Administration > General Author tools > Download Application Integration for Microsoft Office**.

# Remove eForms Designer for Windows

## To remove eForms Designer for Windows

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1. Navigate to **Settings > Control Panel > Add/Remove Programs**.
2. Select IBM® FileNet eForms Designer. Then click **Remove**.
3. Follow the instructions in the window that appears.

Folders and preferences that were not part of the original installation are not removed. If you want to remove the following items, you must delete them manually:

- **My Forms folder** (My Documents\My Forms)
- **Templates folder** (My Documents\My Forms\Templates)
- **Working folder** (My Documents\My Forms\Working)
- **Preferences** (Documents and Settings\[user name]\Application Data\FileNet\eForms)
- **User Preferences** (in the Registry Editor window)
  - **HKEY\_CURRENT\_USER\Software\FileNet\eForms**.

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## Notices

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