



# **FileNet eForms Designer for Windows**

## **Installation and Upgrade Guide**

**Release 5.0.x**

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## Typographical Conventions

Where applicable, this document uses the conventions in the following table to distinguish elements of text.

Convention	Usage
UPPERCASE	Environment variables, status codes, utility names.
<b>Bold</b>	Paths and file names, program names, clickable user-interface elements (such as buttons), and selected terms such as command parameters or environment variables that require emphasis.
<i>Italic</i>	User-supplied variables and new terms introduced in text.
<italic>	User-supplied variables that replace everything between and including the angle bracket delimiters (< and >).
Monospace	Code samples, examples, display text, and error messages.

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## About FileNet eForms Designer for Windows

FileNet eForms Designer 5.0.x 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

**NOTE** You can retrieve the installation guides and hardware and software requirements documents for these products from the [Worldwide Customer Services and Support](#) web site.

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 5.0.x, 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
- Forms Designer 4.x

**NOTE** If Informed Designer 3.5 is installed on your machine, you must remove it before you can install eForms Designer 5.0.x. To remove Informed Designer 3.5, click **start** on the Taskbar 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\Programs\FileNet\Forms** menu:

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

## Documents Available on the Installation CD for Windows

The following documentation is provided on the FileNet eForms Designer Windows CD in the Documentation folder:

- *readme.htm*: Describes the software application.
- *eForms Designer Installation Guide*: Provides instructions for installing FileNet eForms Designer.
- *Supplementary Documentation* folder.

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 FileNet eForms Open Client* (versions 5.0.x and 5.1.0).
- *Use with Web Services* folder: Includes the *Content Services and FileNet eForms Designer* guide, the *Content Services and eForms Filler (Web)* guide, and the *Workflow Author's Guide for FileNet eForms for FileNet Web Services*.

## Planning

Before you install eForms Designer:

- Retrieve the following from the [FileNet Worldwide Customer Support web site](#):
  - [FileNet P8 4.0.0 Hardware and Software Requirements](#)
  - [FileNet P8 4.0.0 Release Notes](#)
- eForms Designer for Windows:
  - 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 [Table 2 on page 9](#) for information.
  - If the machine on which you want to install eForms Designer 5.0.x has Desktop eForms version 4.x installed, you must upgrade Desktop eForms to 5.0.x before you install eForms Designer. If eForms Designer 5.0.0 is installed, the upgrade is automatic.
- Updates to the FileNet eForms Designer software and documentation are made available periodically. Please check the FileNet Worldwide Customer Support web site for updates. On the web site, choose the **Product Tech Info** link. Next, click **Business Process Manager (BPM) > Product Documentation** and select the appropriate files.

## Installation Tasks

### To install eForms Designer

1. Ensure that you have administrator rights for the machine you're installing on.
2. Review the hardware and software requirements ([Task 1 on page 7](#)).
3. Install eForms Designer:

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

Review the [FileNet P8 4.0.0 Hardware and Software Requirements](#) document on the [FileNet Worldwide Customer Support web site](#). Also see the [FileNet P8 4.0.0 Release Notes](#) document for information about what's new and the known issues for this release of the product.

### Task 2: Install eForms Designer for Windows

You must be logged in as a user with administrator rights to run the installer. 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 (FileNet eForms Designer.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 appropriate.
- 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 eForms Designer

1. From the FileNet eForms Designer for Windows CD, run the install program for your operating system. The InstallShield wizard leads you through the installation process. 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**

In this window...	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>Complete</b> . Click <b>Next</b> .
Select Default Target Platform	<p>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>.</p> <p>If the installer detects a previous installation of P8 Application Integration on your system, an additional dialog box is displayed. If you design forms for the P8 eForms fill platform, you can select the <b>Install eForms Integration</b> checkbox to enable the Workplace menu commands in eForms Designer. However, other application integration components (e.g., Office Integration) will be disabled. To re-enable P8 integration for other applications, you must upgrade the integration components for the application after you've finished installing eForms Designer. You can choose not to install P8 Application Integration by clearing the checkbox. Click <b>Next</b>.</p>
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**

In this window...	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	<p>Select <b>Custom</b>. Click <b>Next</b>.</p> <p>If the installer detects a previous installation of P8 Application Integration on your system, an additional dialog box is displayed. If you design forms for the P8 eForms fill platform, you can select the <b>Install eForms Integration</b> checkbox to enable the Workplace menu commands in eForms Designer. However, other application integration components (e.g., Office Integration) will be disabled. To re-enable P8 integration for other applications, you must upgrade the integration components for the application after you've finished installing eForms Designer. You can choose not to install P8 Application Integration by clearing the checkbox. Click <b>Next</b>.</p>
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)**

In this window...	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.

## Remove eForms Designer for Windows

### To remove eForms Designer for Windows

1. Navigate to **Settings > Control Panel > Add/Remove Programs**.
2. Select 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**.