



FileNet eForms for Open Client Installation Guide

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Welcome to FileNet eForms for Open Client

Welcome to FileNet Corporation's eForms for Open Client, a diverse and sophisticated product family that integrates with eContent and eProcess management applications. eForms for Open Client provides everything you need to design, process, and deploy electronic forms.

About the Installation Guide

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

- Instructions for installing eForms Designer.
- Instructions for installing eForms for Open Client and configuring the eForms HTML Step Processor.
- Setting up document classes.

What is eForms for Open Client?

Using eForms for Open Client, you can integrate electronic forms with the FileNet Open Client infrastructure. eForms for Open Client consists of the following components.

- eForms Designer
- eForms HTML Step Processor
- eForms HTML filler component

eForms Designer

eForms Designer gives you the tools to create professional-looking templates. Because you store the templates electronically, it's easy to keep them up-to-date. With eForms Designer's tools and functions, you can make forms automatically calculate, format, look up, and check information for the user.

eForms HTML Step Processor

The eForms HTML Step Processor integrates with eProcess to provide integration of intelligent eForms into the workflow process. eProcess Services provides the means for designing workflows; it also provides security privileges and a repository for templates, data documents, and workflows. The eForms HTML Step Processor acts as a content development tool that facilitates the design and launching of workflows and workflow components.

The Workflow author uses the eForms HTML Step Processor to integrate the following types of eForms in the Workflow:

- OC (Open Client) eForms Templates
- OC eForms Data
- eForms HTML eRouting slip

For more information, see the *Workflow Author's Guide for eForms for Open Client* and the *FileNet eForms Designer* on-line help.

eForms HTML filler component

The eForms HTML filler component allows users to fill out forms in a web browser. A form can appear in the FileNet Open Client interface in one of the following ways:

- A form can be displayed on its own tab in a workflow.
- A form can be displayed in its own window if it is opened from a workflow's Attachments tab or from a Content Services library.

eForms for Open Client Manuals

The eForms for Open Client manual set is designed to provide a complete reference to the features and functionality of the eForms for Open Client components. The manual set contains documents for form authors, workflow authors, and form users.

Installation Manuals

- *Pre-Installation Guide*. This guide contains instructions for creating and installing a server certificate. This step is necessary if you want users to sign forms using the I-Sign signature service.
- *Installation Guide*. This guide contains instructions for installing eForms for Open Client and eForms Designer. Instructions are also included for configuring the eForms HTML Step Processor and for setting up document classes.

On-line Help and Manuals for Form Authors

For information about how to design templates and add intelligence to forms, see the following on-line help and documents:

- *FileNet eForms Designer Help*. This on-line help provides a complete reference to the design and graphics features and contains information about using digital signatures, linking forms to other data sources, and using formulas and functions to automate your forms.
- *FileNet eForms Designer Tutorial*. This tutorial contains step-by-step instructions about how to draw a template using the drawing tools and how to add basic intelligence to your form using data formatting, calculations, choice lists, help messages, and more.

Manuals for Workflow Authors

For information about how to use the eForms HTML Step Processor, see the following document:

- *Workflow Author's Guide for FileNet eForms for Open Client*. This guide provides comprehensive coverage about the features of the eForms HTML Step Processor.

Manuals for Form Users

For information about how to fill out and manage forms, see the following document:

- *User's Guide for eForms for Open Client*. This guide provides step-by-step instructions for using eForms in the FileNet Open Client interface.

Manuals for Converting eForms Web Templates

For information about how to convert eForms Web Templates so they can be used in FileNet Open Client, see the following document:

- *Converting Panagon eForms 4.2.2-x Files and FileNet eForms for FileNet Web Services 5.x Files for Use With FileNet Open Client.* This manual provides instructions for converting eForms Web templates and Panagon eForms Web templates for use with FileNet Open Client.

Install FileNet eForms Designer

This chapter provides instructions for installing eForms Designer and its associated files on Windows computers. Installation is done with an easy-to-use installer application that you'll find on the eForms Designer CD-ROM.

NOTE FileNet eForms Designer and FileNet eForms for Open Client are provided on separate CDs.

What Comes With eForms Designer

The following files come with eForms Designer:

- eForms Designer application and related files.
- eForms Designer manual set for form authors.

Before You Install eForms Designer

- Obtain the following from the [Worldwide Customer Support website](#):
 - [FileNet eForms for Open Client 5.1.0 Platform Requirements](#)
 - [Release Notes for FileNet eForms for Open Client 5.1.0](#)
- eForms Designer, Forms Designer, and Informed Designer cannot exist on the same machine at the same time. If you have a copy of Forms Designer on your machine, you must uninstall it using **Add/Remove Programs** in the Windows Control Panel before you install eForms Designer.

Install eForms Designer

This section explains how to install eForms Designer 4.1.x on Windows. You can choose the Complete Setup or Custom Setup installation option. Information about these options is provided below. For information on how to install eForms Designer 5.0.0, please visit the [CSS website](#) and download the *FileNet eForms Designer Installation Guide*.

We recommend that you exit all Windows programs before running the installer.

1. Insert the CD-ROM into your computer.
2. If the CD browse page launches eForms automatically, follow the instructions to locate the installer.

If the CD does not launch automatically, double-click your CD-ROM drive icon to show the contents of the CD. Open the eForms Designer folder. Double-click the Setup.exe icon to launch the InstallShield wizard.
3. The InstallShield wizard leads you through the installation process. Follow the instructions in the wizard.

When the Licence Agreement page is displayed, please read the agreement carefully. Then click the appropriate option to continue.

After installation, a message appears informing you that the installation was successful. Click **Finish** to quit the installer.

NOTE The CapiCom plug-in (Windows only) replaces the CryptoAPI plug-in. Registration requirements for the associated dll file are handled during installation. Client machines that are running Windows XP have CapiCom.dll version 2.0. Users running other Windows operating systems must install this dll on their workstations. Users should go to www.microsoft.com, search for "capicom.dll", and download the file.

Installation Options

The installer allows you to choose the Complete setup or Custom setup installation option. Select the appropriate option in the installer window.

Complete Setup

The default option for installation is the Complete setup. If you select this option, the installer application automatically installs the following standard program features:

- eForms Designer.
- All eForms plug-ins.
- Spell checking and online Help.

NOTE eForms Designer integration with Content Services requires the FileNet plug-in. To install the plug-in, you must select the custom setup option. The FileNet plug-in is designed to be compatible with IDM Desktop client version 3.x.

Custom Setup

Select the custom setup option if you want to choose which features to install and where you want them installed. You must select Custom setup if you want to do the following:

- Install the FileNet plug-in to have eForms Designer integrate with Content Services.
- Install a spelling dictionary other than English.
- Install the Entrust® plug-in.

NOTE For eForms for Open Client, the Entrust® signing service is available only for authorizing templates using eForms Designer. Entrust® is not supported for signing or verifying forms.

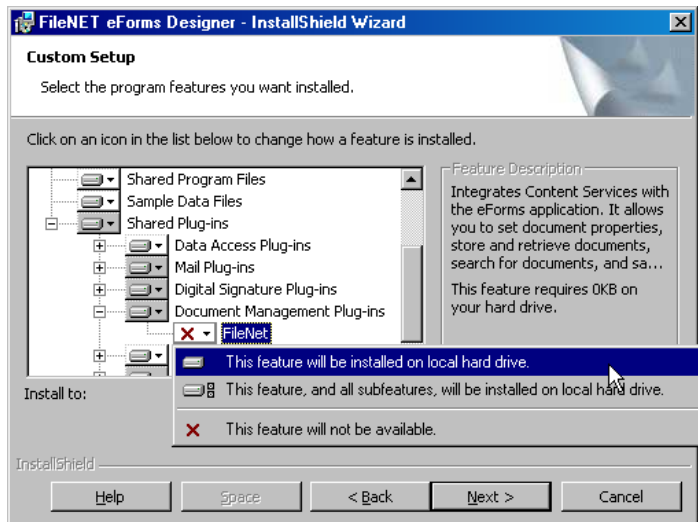
To run the Custom setup option

1. In the InstallShield Wizard, select the 'Custom' setup option.
2. On the Custom Setup screen, click a feature's icon to view a drop-down list of installation options for that feature. Select the items you want to install.

To find out more about a feature, click its name; a description of the feature is displayed on the right side of the screen. To view custom setup tips, click **Help** at the bottom of the screen. You can view disk space requirements by clicking **Space**.

To install the FileNet plug-in

1. From the list of components on the Custom Setup screen, click "Shared Plug-ins," then "Document Management Plug-ins," then "FileNet."



2. From the drop-down menu, select “This feature will be installed on local hard drive.”
3. If you want to change the application’s default destination folder, click **Change**.
4. Click **Next** to continue.
5. Click **Install** to install eForms Designer; then click **Finish** to quit the installer.

When the setup application runs, it checks to see if the IDM Desktop client software has been installed on your computer.

To install the Entrust® plug-in

1. From the list of components on the Custom Setup screen, click “Shared Plug-ins,” then “Digital Signature Plug-ins,” then “Entrust®.” From the drop-down menu, select “This feature will be installed on local hard drive.”
2. Click **Next** to continue.
3. Click **Install** to install eForms Designer; then click **Finish** to quit the installer.

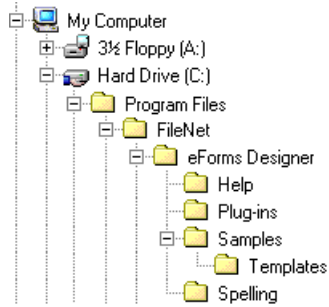
NOTE In addition to the Entrust® plug-in, form authors must have the Entrust® client software installed on their local machines in order to use this signing service to authorize templates.

To install spelling dictionaries other than English

1. From the list on the Custom Setup screen, click “Shared Plug-ins,” then “Spelling Plug-in.” Select the spelling dictionaries you want to install. For each dictionary you select, choose “This feature will be installed on local hard drive” from the drop-down menu.
2. Click **Next** to continue.
3. Click **Install** to install eForms Designer; then click **Finish** to quit the installer.

Folder Structure

Unless you changed the location during installation, the eForms Designer folder resides in the FileNet folder.



Install FileNet eForms for Open Client

This chapter provides detailed instructions for installing eForms for Open Client, how to set up the appropriate document classes for data documents, and how to configure the eForms HTML Step Processor for use with eProcess.

Pre-Installation Tasks

If you want users to sign forms using the I-Sign signature service, you must create and install a server certificate. See the *Pre-Installation Guide* for instructions.

Install eForms for Open Client

Installation of eForms for Open Client is done with an easy-to-use installer application. Installed items include the eForms HTML Step Processor and the eForms HTML filler component.

eForms for Open Client must be installed on the same web server as FileNet Web Workflo and FileNet Open Client. We recommend that you exit all Windows programs before you run the installer.

NOTES

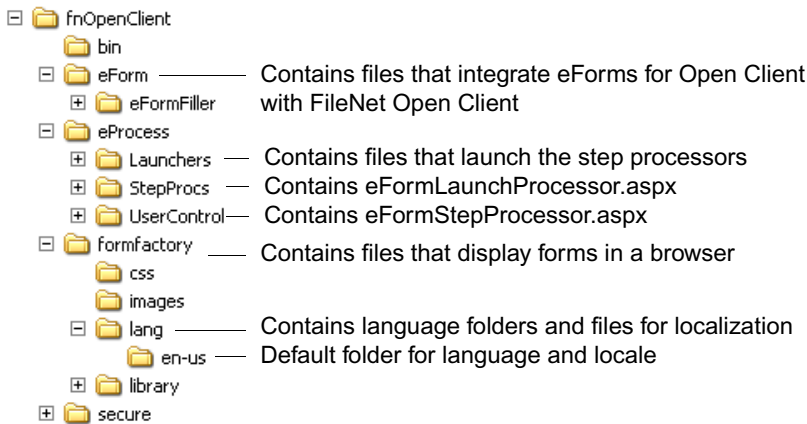
- The eForm.config file is deleted during uninstallation. If you want to keep a copy of your previous eForm.config file for future reference, create a copy before you update or uninstall eForms for Open Client.
- The eForms for Open Client installer detects the FileNet Open Client installation and automatically adds the eForms for Open Client integration preference. When the preference is set, it allows FileNet Open Client to recognize the existence of eForms for Open Client. If you later uninstall eForms for Open Client, the preference is removed.

FileNet eForms Designer and FileNet eForms for Open Client are provided on separate CDs.

1. Double-click the file called "Setup.exe." The InstallShield Wizard page displays and begins the setup process.
2. On the Welcome page, click **Next**.
3. Read the License Agreement. If you agree, select the 'I accept the terms in the license agreement' option. Then click **Next**.
4. Enter/confirm your customer information in the User Name and Organization fields. Select the appropriate application user option. Click **Next**.
5. The destination folder path (**Program Files\FileNet\IDM\Web\fnOpenClient**) is displayed. This is the standard location for the eProcess fnOpenClient folder. If the fnOpenClient folder on your eProcess web server is at a different location, click **Change**, select the correct location, and click **OK**. Click **Next** to accept the folder path.
6. On the Preferences page in the path field, enter the URL to the custom logo you want to display in the eForms Step Processor window. If you leave this field blank, the FileNet logo is displayed. Click **Next**.
7. Click **Install** to begin the installation.
8. On the InstallShield Wizard Completed page, click **Finish**.

- Verify the version you have installed by opening the version.aspx file. To do this, open your web browser. In the address field, enter the URL for your FileNet Open Client website and add the following to the end of the URL: /eform/eformfiller/version.aspx (e.g., http://[servername]/[virtualdirectoryname]/eform/eformfiller/version.aspx).

Folder Structure



Set Up Document Classes

Before web forms are deployed to a Content Services library, you need to set up two Document Classes: OC eForms Template and OC eForms Data.

- From the menu bar in the CS Explorer Window, choose **Tools > Document Class**.
- Click **New DC** to display the DocClass dialog box.
- In the 'DocClass Name' field, enter **OC eForms Template**.
- Select the 'Item Properties' option. From the Available Properties list, select "Item ID," "Title," "Comment," "Current Version Checked Out," and "Current Version Author." Then click the right arrow to move each item to the DocClass Properties list.
- Click **Add**.
- Return to the DocClass Name field and enter another document class called **OC eForms Data**.
- Repeat step 4.
- Click **Done**. Then click **Exit**.

Security Permissions for OC eForms Data Documents

OC eForms Data documents inherit permissions from the folder that it is saved to.

To set up security permissions for users on a folder that will store OC eForms Data documents

- In the Content Services library, create a folder that will store OC eForms Data documents.
- Click the folder and then choose **Properties**.

3. Click the Security tab and add the users or groups that require access to this folder.
4. Choose the appropriate access level for each user or group that you add.
5. Click **Apply Changes**.

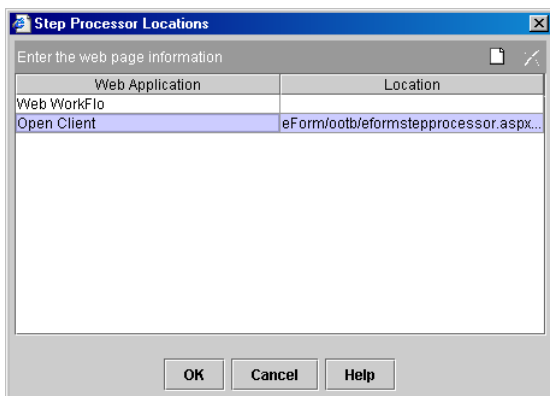
To test the security permissions on the folder

1. Open a blank form template, enter some data in the form.
2. Save the form to the folder. The form is saved as a OC eForms Data document.
3. Return to the folder and view the properties for the document. Ensure that the properties are the same as the ones set for the folder.

Configure the eForms HTML Step Processor

Before workflow authors can use an eForm in a workflow, it must be configured for use in the isolated region where the workflow will run.

1. In your web browser, go to your FileNet Open Client website.
2. Click the **Process** link in the top right corner of the window.
3. Click the Tools tab. Then click **Configuration Console**.
4. If prompted, enter the system administration user name and password.
5. In the Root directory, right-click “vwrouter” and choose “Connect.”
6. Right-click “vwrouter” and choose “Properties.”
7. In the Isolated Region Properties dialog box, click the Step Processor Info Tab.
8. Click the **Add** icon.
9. Enter the following values as indicated in bold:
 - Type **Step**
 If most of your workflows will include eForms attachments, you may want to make the eForms HTML Step Processor the default step processor. If this is the case, select “Default step” in the ‘Type’ field.
 - Name **eForms**
 - Language **HTML**
10. Double-click the ‘Location’ field to display the Step Processor Locations dialog box.
11. In the Open Client ‘Location’ field, enter **eForm/ootb/eFormStepProcessor.aspx**.



12. Click **OK** to close the Step Processor Locations dialog box.

13. Enter the following values as indicated in bold:

- Width **800**
- Height **600**
- Class name leave blank

14. Click **Add**.

15. Enter the following values as indicated in bold:

- Type **Launch**

If most of your workflows will include eForms attachments, you may want to make the eForms HTML Step Processor the default step processor. If this is the case, select "Default launch" in the 'Type' field.

- Name **Launch eForms**
- Language **HTML**

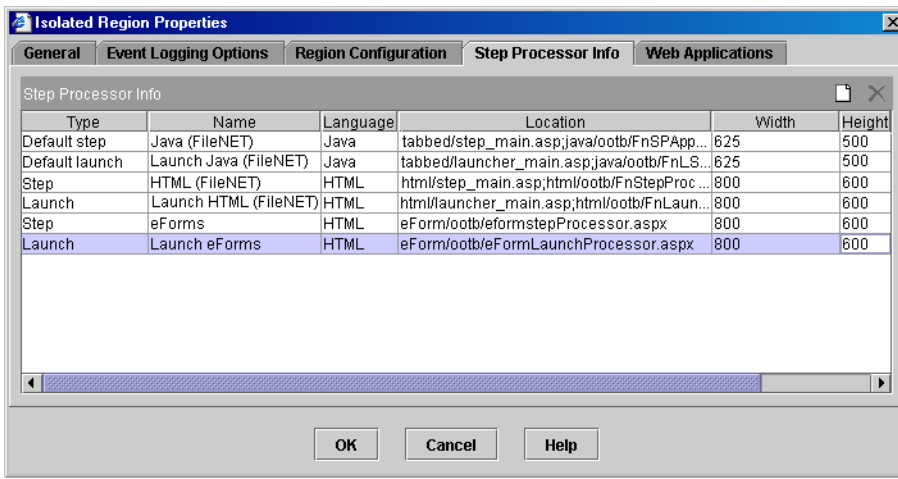
16. Double-click the 'Location' field to display the Step Processor Locations dialog box.

17. In the Open Client 'Location' field, enter **eForm/ootb/eFormLaunchProcessor.aspx**.

18. Click **OK** to close the Step Processor Locations dialog box.

19. Enter the following values as indicated in bold:

- Width **800**
- Height **600**
- Class name leave blank



20. Click **OK**.
21. Right-click “vwrouter” and choose “Commit Changes” from the pop-up menu.
22. Close the eProcess Configuration Console window.

Customize the eForms HTML Step Processor

In the eForms HTML Step Processor, use the eForm.config file to customize the banner.

NOTE The Print HTML button is not supported in eForms for Open Client 5.1.0

The selected default code from the “eForm.config” file is shown below. This setup keeps the FileNet logo, Home Link, Logout Link, Logout All Link, and Help links and Processing step tag and tab on the banner.

```
...
<stepProcessor>
<fnbanner imgsrc="" />
</stepProcessor>
...
```

To customize the eForms HTML Step Processor

1. Navigate to the FNOpenClient folder on the server and open the “eForm.config file.”
2. In the `<fnbanner imgsrc="" />` code, enter the path to the image that will appear in the banner.

For example, the image referenced below is under the FNOpenClient/Images/Header folder.

```
<fnbanner imgsrc="../../../Images/Header/eForm-w.jpg" />
```

NOTE The Home Link, Logout Link, Logout All Link, and Help links and Processing step tag and the tab will not appear on the banner.

3. In the `<showProgressbar value="false">` tag, change “false” to “true” if you want to display a progress bar to indicate when a request (especially a long one) is being processed.
4. In the `<signatureValidation value="false">` tag, change “false” to “true” to enable a check for signatures when the user clicks Launch, Complete, Reassign, Save, and Checkin.

5. Save and close the “eForm.config file.”

NOTE In the eForm.config file, you may change the form background color. The default color is currently set to light grey (EEEEEEEE):

```
<configuration>
...
  <formAttributes>
    <backgroundColor>EEEEEE</backgroundColor>
  </formAttributes>
...
</configuration>
```

6. The refreshRate variable determines how often a request is posted to a server that helps an opened session in the eFormLaunchProcessor and the eFormStepProcessor to remain open and editable. In the <refreshRate value="5"> tag, you can change the value to the desired refresh rate in minutes. If you want to set the refresh rate so that it doesn't refresh for several hours, set it to a high number, for example, 1000. To set the refresh rate so that it never refreshes, set it to 0.

Customize I-Sign Signature Verification

The default I-Sign signing service verifies signatures with Content Services. However, you can customize I-Sign so that it verifies signatures using a protocol (for example, LDAP).

To customize the I-Sign signature verification

1. Open Visual Studio.NET and create a .dll project. Ensure that the “namespace” is the same as the “classname” in the eForm.config file.

For example, in the .dll project:

```
namespace isignoverload
public class CustomSign
```

Then in the eForm.config file:

```
<details classname="isignoverload.CustomSign"...
```

The username and password are both passed into the method as a String Array within an Object[]. An example of this is shown below:

```
namespace isignoverload
{
...
  public class CustomSign
  {
    public CustomSign()
    {
    }
    public XmlDocument isignXML(Object[] userInfo)
    {
      XmlDocument xml = new XmlDocument();
      ...
      return xml;
    }
  }
}
...
}
```

2. Navigate to the FNOpenClient folder on the server and open the “eForm.config file.”

The eForm.config file specifies the dll, class, location, and method name that are invoked to return the valid UserInfo xml.

3. Enter the following code:

```
...
<customSign>
  <details classname="isignoverload.CustomSign" methodname="isignXML"
    dllname="isignoverload.dll" assemblylocation="C:\\Program
    Files\\FileNET\\IDM\\Web\\FNOpenClient\\"/>
</customSign>
...
```

NOTE If the login is invalid, the method must return a null value. This triggers the code to prompt a window stating the login has failed. The two strings within the string array can then be used to perform whatever verification is desired. The bold fields need to be provided with values within the code. The CurrentDateTime value needs to be formatted as “yyyy-MM-dd HH:mm:ss zzz.”

After the verification, the following xml structure must be duplicated and returned.

```
<?xml version="1.0">
  <userInfo>
    <cn>UserName</cn>
    <o>CompanyName<o>
    <sn>UserName</sn>
    <signer>
      <attr name="cn" value="UserName" />
    </signer>
    <signingTime>CurrentDateTime</signingTime>
  </userInfo>
```

This xml is then used to replicate a valid user and sign the field as necessary.

Customize the Signature Certificates Filter

When one or more digital and non-digital signature certificates exist on a client machine, by default a filter is enabled. When the user clicks the Sign button in a signature field, the following can occur:

- form data is automatically signed with a single, valid digital signature certificate if only one valid digital signature certificate exists.
- a selection dialog box displays all the signature certificates with an available private key that's installed on the client's machine.

To disable the filter and allow the user to choose from a list of all signature certificates

1. Navigate to the FNOpenClient folder on the server and open the “eForm.config file” with any text editor.
2. In the <CSPFilter> tag where <CSPFilter value=“true”>, change the value to “false.”

Disable Tooltips for Text Objects (Optional)

By default, tooltips for text objects display when the user hovers the mouse over the text on the form. This makes it easier for the user to see small text on the form. If you want to disable this feature, you can modify the `ToolTipForText` parameter in the `eForms.config` file.

To disable tooltips for text objects

1. Navigate to the `FNOpenClient` folder on the server and open the “`eForm.config` file” with any text editor.
2. In the `<ToolTipForText>` tag where `<ToolTipForText value=“true”>`, change the value to “`false`.”