



FileNet Forms Manager

Installation Guide

Release 4.2.0

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About the Forms Manager Installation Guide

Welcome to FileNet Forms Manager. FileNet Forms Manager is a web-based electronic forms management solution, a sophisticated product designed to facilitate eBusiness transactions.

About This Guide

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

- A planning section with links to the system requirements.
- Instructions for installing Forms Manager.
- Instructions for configuring the eForms Central library.
- Instructions for installing Forms Designer and Desktop eForms (optional).

What is FileNet Forms Manager?

A server-based product, FileNet Forms Manager is designed to streamline the elements of eForms management. FileNet Forms Manager has four components:

- Forms Manager Server
- eForms Central library
- Forms Designer
- FileNet eForms

Forms Manager Server

Forms Manager Server is comprised of the files that are stored on the web server and the services behind the eForms Central library. Services can include auto-incrementing of numbers on forms created from templates, document tracking, and database lookups (e.g., country codes, industry or company-specific data such as part numbers).

FileNet Forms Manager eForms Central Library

FileNet Forms Manager eForms Central library is a repository of electronic forms that are available from your organization's web server. Your eForms Central library can store ITX Form Templates and Desktop Form Templates.

The library can also store a variety of other document types. These include Microsoft Word and Microsoft Excel files, among others.

Forms Designer

Forms Designer gives you the tools to create and deploy professional-looking templates. Since you store the templates electronically, it's easy to keep them up-to-date. With Form Designer's tools and functions, you can have forms automatically calculate, format, look up, and check information for the user. Forms Designer is a standalone application that is run from your desktop.

FileNet eForms

FileNet eForms is comprised of HTML eForms and Desktop eForms. With these components, users can fill out forms in a browser using HTML eForms or on their desktop using Desktop eForms.

When users click an ITX Form Template icon, a blank form opens in HTML eForms and they can fill it out online. When users save this type of form, a Form Data document is created and it is stored on the My Forms page of the eForms Central library.

When users click a Desktop Form Template icon, a blank form opens in Desktop eForms and a copy of the template is stored in their local Templates folder. When users save this type of form a Desktop Form Data document is created and it is stored on their local computer in **My Documents\My Forms** (Windows 98SE, 2000, and XP Pro) or **Documents\My Forms** (Macintosh OS 9.2.2 and X).

Desktop Form Templates can be accessed offline, and new Desktop Form Data documents can be created using Desktop eForms without going to the eForms Central library. However, when a Desktop Form Template is revised and the new version is added to the eForms Central library, the user is notified the next time he or she attempts to create a new Desktop Form Data document from the template on the local computer.

Features of the eForms Central Library

The eForms Central library can be used to perform the following tasks:

- Create multiple libraries.
- Customize the library interface.
- Display the company or organization name in standard page content.
- Create distribution center profiles automatically.
- Customize the personal information template.
- Implement the appropriate authentication method.
- Determine whether user accounts are required (Built-in authentication method only).
- Determine whether users can manage their accounts and/or personal information.
- Specify an email address for forgotten user passwords (Built-in authentication method only).
- Enable error logging.

What Ships With FileNet Forms Manager

FileNet Forms Manager ships with the FileNet Forms Manager eForms Central Windows CD that contains the installer and related files for Forms Manager Server. Manuals, Help files, and a sample personal information template are also provided.

Installers and related files for Forms Designer and Desktop eForms are provided on the FileNet Forms Designer Windows and FileNet Forms Designer Macintosh CDs. Manuals and Help files are also included on both CDs.

FileNet Forms Manager Documentation

The following documentation is located on the FileNet Forms Manager eForms Central Windows CD in the Documentation folder or on the Help page of the eForms Central library.

- *doc_readme.htm*: Describes the files that are contained in the Documentation folder on the CD.
- *eForms Pre-installation Guide*: Explains how to create and install a server certificate for users who will be signing forms using the I-Sign signature service.
- *Forms Manager Installation Guide*: Contains instructions for installing FileNet Forms Manager. It also includes instructions for configuring the eForms Central library and installing Forms Designer and Desktop eForms.
- *Forms Manager Server Migration Guide*: Explains how to migrate from Informed Quadra Server to Forms Manager Server.
- *Forms Manager eForms Central Tutorial*: Teaches form authors and eForms Central account administrators how to manage user accounts in a library. Also explains how form administrators manage folders, templates, and other documents in a library. Exercises, step-by-step instructions, sample templates, and other documents are provided.
- *Forms Manager Administrator Help*: Explains how account administrators can create and manage user accounts in the eForms Central library. Also explains how form administrators manage folders, templates, and other documents in the library.
- *eForms User Help*: Explains how general users work with forms in the eForms Central library and in Desktop eForms.

FileNet Forms Designer Documentation

The following documentation is located on the FileNet Forms Designer Windows and Macintosh CDs in the Documentation folder or on the Help page of the eForms Central library.

- *doc_readme.htm*: Describes the files that are contained in the Documentation folder on the CD.
- *eForms User Help*: Explains how general users work with forms in the eForms Central library and in Desktop eForms.
- *Forms Designer Help*: Provides instructions for designing templates. It also provides instructions for using functions, formulas, and automated features such as configuring forms for tracking.
- *Forms Designer Tutorial* (intended for form authors): Teaches form authors how to draw a form using the drawing tools and how to add basic intelligence to the template.
- *Forms Designer Advanced Tutorial* (intended for form authors): Teaches form authors how to automate a form using various intelligence features such as JavaScript, custom menus, functions, ODBC and HTTP connectivity for auto-incrementing, form tracking, data submits and data lookups, digital signatures, routing, and dynamic choice lists.
- *Forms Manager API Syntax*: Describes the API Syntax for Forms Manager including data source merging and toolbar configuration.
- *Forms Designer AppleScript Reference*: Provides a description of each eForms AppleScript object, code examples, and terminology to use when writing scripts for Desktop eForms.
(Macintosh Only)

- *Forms Manager Installation Guide*: Contains instructions for installing FileNet Forms Manager. It also includes instructions for configuring the eForms Central library and installing Forms Designer and Desktop eForms.
- *Forms Manager Administrator Help*: Explains how account administrators can create and manage user accounts in the eForms Central library. Also explains how form administrators manage folders, templates, and other documents in the library.

Conventions Used in This Manual

This section describes the conventions used in this manual.

Terminology

Term	Definition
User	Fills out forms in the eForms Central library and Desktop eForms.
Form Author	Creates templates using Forms Designer.
Form Administrator	Deploys templates, manages folders, templates, and other documents in the eForms Central library. May also be a form author.
Account Administrator	Manages user accounts in the eForms Central library.

NOTE In your organization, the form author may have an extra role as form administrator.

Notes

Paragraphs of text that appear with the label “Note” contain information such as warnings, reminders, and conditions to be aware of. The example below shows a typical note.

NOTE Important information appears in a note similar to this one.

Commands and Control Names

When specific instructions for how to perform a certain task are given in this manual, the commands and button names are shown in a bold type. For example:

“Right-click the Forms Manager folder; then click **Properties**.”

The names of options, fields, and drop-down lists are shown in single quotes. Items that are selected from a drop-down list are shown in double quotes. For example:

If you want to change the application’s default install location, select “Select Folder” from the ‘Install Location’ drop-down list. Browse to select an existing location for the installation folder, or click **New Folder** to create a new destination folder.

Planning

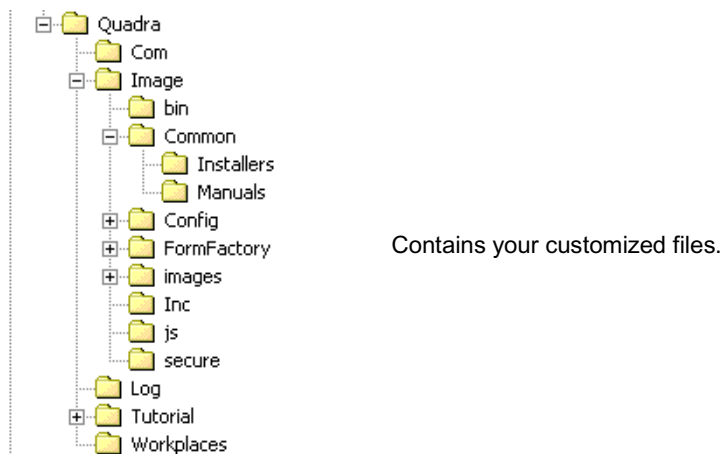
Before you install FileNet Forms Manager:

- If you are upgrading from Informed Quadra version 4.0.1, 4.0.2, or 4.1.0 to version 4.2.0 please follow the instructions in the *FileNet Forms Manager Migration Utility Guide*.
- If users will be signing forms using the I-Sign signature service, create and install a server certificate by following the instructions in the *eForms Pre-installation Guide*.
- Retrieve the following from the [FileNet Worldwide Customer Support web site](#):
 - [FileNet Forms Manager 4.2.0 Hardware and Software Requirements](#)
 - [Forms Manager Release Notes](#)

NOTE You can obtain updates to the FileNet Forms Manager documentation from the product documentation folder on the FileNet Worldwide Customer Support web site.

Before you Install Forms Manager Server

If you are upgrading from Informed Quadra version 4.0.1, 4.0.2, or 4.1 to Forms Manager version 4.2.0 you should first back up your existing personal information templates for all your libraries.



You should also determine your server settings so you can enter the following information during the installation:

- Server name
- HTTPS port
- Whether you are using HTTPS for all requests or only I-Sign signatures.
- Whether you are using 128 bit encryption.

Backing Up Files

If you plan to customize any of your eforms Central files, we recommend that you back up these files. For information about customizing the eForms Central library, see [“Customize the Library Interface” on page 29.](#)

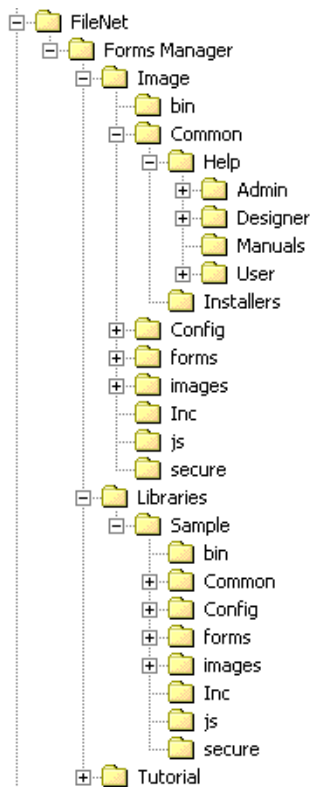
We recommend that you follow standard procedures by backing up your database regularly. Data files, templates, account information, and folders (all the data in your eForms Central library) are stored in your database.

Folder Structures

FileNet Forms Manager

Unless you changed the location during installation, the Forms Manager folder resides in the FileNet folder. If your company uses other FileNet products, such as Forms Designer, you will see the corresponding folders at this level.

When you create a new library, a folder for it with all the necessary files is added below the Libraries folder. The following example shows a library called “Sample.”



Forms Manager folder structure

Folder Permissions

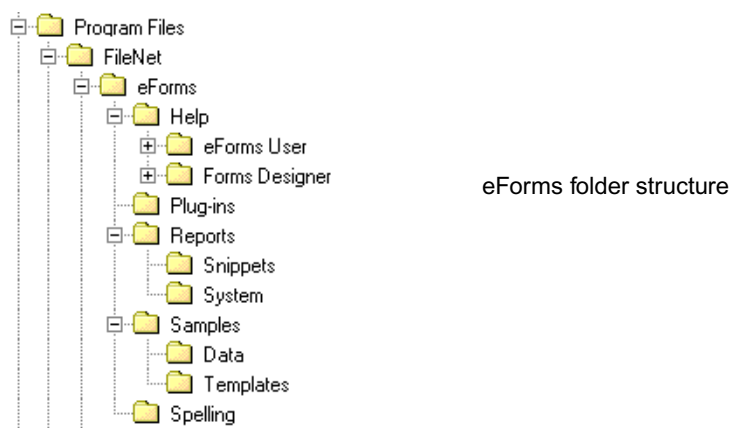
The Forms Manager folder inherits the security permissions of its parent folder. System administrators should modify the security of the Forms Manager folder in accordance with their organization's security policies.

Each eForms Central library inherits the security permissions from its parent folder and eForms Central Manager automatically assigns the appropriate permissions.

eForms

Windows

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



Macintosh

Unless you changed the location during installation, on Macintosh OS 9, the Forms Designer application resides in the **Applications (Macintosh OS 9.2.2)\FileNet eForms** folder. The Data and Templates folders reside in the **Applications (Macintosh OS 9.2.2)\FileNet eForms\Samples** folder.

For Macintosh OS X, Forms Designer can be found in the **Applications\FileNet eForms** folder, and the Data and Templates folders are in the **Applications\FileNet eForms\Samples** folder.

For Macintosh OS 9 and OS X, the default location for the Help, Spelling, and Plug-ins folders are in the Forms Designer package. To display the contents of the package, Control + click the Forms Designer icon in the FileNet eForms folder; then choose **Show Package Contents** from the pop-up menu. The Help, Spelling, and Plug-ins folders are located in the **Contents\Mac OS** folder.

Installation Tasks

This section of the guide describes how to install Forms Manager Server.

If you are upgrading from Informed Quadra version 4.0.1, 4.0.2, or 4.1.0 to version 4.2.0 please follow the instructions in the *Forms Manager Migration Utility Guide*.

To Install Forms Manager

1. Review FileNet Forms Manager Server Requirements ([Task 1 on page 14](#)).
2. Install Forms Manager Server ([Task 2 on page 14](#)).

Task 1: Review FileNet Forms Manager Server Requirements

Review the [FileNet Forms Manager 4.2.0 Hardware and Software Requirements](#) on the [FileNet Worldwide Customer Support web site](#) for the required versions, service packs, and fixes for third-party software.

Task 2: Install Forms Manager Server

Important notes:

- The Forms Manager Server setup file (setup.exe) is on the FileNet Forms Manager eForms Central Windows CD.
- Before you start the installation, please **close all open applications**. You must be logged in as an system administrator. After installation, you must restart your computer. Ensure that IIS can be stopped and re-started during the Forms Manager installation. No services should be running that will automatically restart IIS.
- The installation wizard leads you through a series of pages. The user name, company name, and the path to the location where the files are to be installed are pre-filled. You can change this information.

To install Forms Manager Server

1. On the CD, double-click **setup.exe**.
2. The Setup program leads you through the installation process. Follow the instructions on the screen.

User manuals such as the *eForms Pre-installation Guide* and the *Forms Manager eForms Central Tutorial* are provided in PDF format on the CD. *Forms Manager Administrator Help*, *Forms Designer Help*, and *eForms User Help* files are provided in HTML format. Please provide users with access to these files as appropriate. See [“FileNet Forms Manager Documentation” on page 8](#) and [“FileNet Forms Designer Documentation” on page 8](#) for a description of the documentation.

NOTE If you will be migrating data from an Informed Quadra eForms Workplace on an Informed Quadra Server to an eForms Central library on a Forms Manager Server, please see the *FileNet Forms Manager Server Migration Utility Guide* for instructions. If you migrate your data, you will not need to configure the library as described in configuration tasks 3 to 9, [page 16](#) to [page 28](#). However, you should refer to the other configuration tasks described in the guide.

Configuration Tasks

This section explains how to use the eForms Central Manager application to configure the eForms Central library. It also discusses customizing the Home page and the banner (optional) and setting up users to access the library.

For each eForms Central library that you add to the server, you must make decisions about the following configuration questions. These topics are described in the “Configuration Options” section that follows.

- Which authentication method does your organization need?
- If user accounts are required, what permissions will they have?
- What type of [database](#) will you have and where will you store it?
- Which mail authentication type does your organization need?
- Will users require Desktop eForms? If so, will they install it themselves from a link?
- Do you want [error logs](#) to be generated automatically?

To configure and customize an eForms Central library

1. Configure an eForms Central library ([Task 3 on page 16](#))
2. Set up the General Page ([Task 4 on page 17](#))
3. Set up the Authentication page by using one of the following authentication methods:
 - Built-in ([Task 5a on page 18](#))
 - Active Directory ([Task 5b on page 20](#))
 - Window Login ([Task 5c on page 23](#))
 - Headers ([Task 5d on page 24](#))
4. Set up the Database using one of the following:
 - SQL Server ([Task 6a on page 26](#))
 - Other ([Task 6b on page 27](#))
5. Set up Mail ([Task 7 on page 27](#))
6. Set up Desktop Clients ([Task 8 on page 28](#))
7. Error Handling ([Task 9 on page 28](#))
8. View Your New Library ([Task 10 on page 28](#))
9. Remove an eForms Central Library ([Task 11 on page 29](#))
10. Customize the following in the Library Interface
 - Banner ([Task 12a on page 29](#))
 - Home Page ([Task 12b on page 30](#))
 - Set the Start Page ([Task 12c on page 30](#))

- Customize Links on Sidebar and Banner ([Task 12d on page 31](#))
 - Columns on List Pages([Task 12e on page 32](#))
 - Style sheets ([Task 12f on page 32](#))
 - Personal Information Template ([Task 12g on page 33](#))
11. Set up Administrators ([Task 13 on page 33](#))
 12. Download Distribution Center Profiles ([Task 14 on page 34](#))

Task 3: Configure an eForms Central Library

To configure an eForms Central library

1. Launch the eForms Central Manager by clicking the shortcut on the Start menu or by choosing **Program Files > FileNet > Forms Manager > eForms Central Manager**.

When eForms Central Manager opens you'll see the following buttons on the first page:

Option	Description
Add	Adds a new eForms Central library.
Edit	Opens an existing eForms Central library for editing.
Remove	Deletes the selected eForms Central library.
Exit	Closes the eForms Central Manager.

2. Click **Add** to configure a new eForms Central library.
3. See [Task 4 - Task 9](#) for information about how to fill out each tab.
4. When you finish configuring the eForms Central library, click **Finish** to close the eForms Central Manager.

If you selected Built-in Authentication, the Select Anonymous Account dialog box appears. Select "IUSR_[server name]" from the list. Then close the dialog box.

NOTE If the information in a field is required, or if you have entered invalid information in a field, a blinking information symbol appears next to the field when you attempt to move to the next page. A text message appears when you move your pointer over the symbol.

The pages of the eForms Central Manager and the fields on each page are described next.

Task 4: Set up the General Page

Enter the appropriate information in the fields on the General Page:

Field	Description
Folder Name	The internal name of an eForms Central library. This name is used for the folder that contains eForms Central library files. You'll see this name in \\... FileNet\Forms Manager\Libraries on your local computer.
Company	The name of the company or organization for which you are configuring an eForms Central library. This name appears on the Home page.
Library Name	The name of the eForms Central library. This name is displayed on the Home, Help, and Software pages. The name of the eForms Central library can have up to 32 characters. If you are upgrading from Informed Quadra Server, the library name must be the same as your Informed Quadra Server name. See your <i>Forms Manager Server Migration Guide</i> for more information.
Library Description	A description of the contents or purpose of an eForms Central library (optional).
Use HTTPS	Use to select the HTTPS protocol for requests. If you do not select the Use HTTPS checkbox, HTTP is automatically used for all requests and I-Sign signatures. If you choose to use HTTPS, the following options are available: Port: Enter your HTTPS port number or accept the default number, 443. For all requests: Select if you want to use HTTPS for all requests. Only for I-Sign Signatures: Select if you want HTTPS to be used only when users are signing forms using the I-Sign signature service. Use 128 bit encryption: Select if you want 128 bit encryption to be used for HTTPS requests. This checkbox must be selected if you want to use the I-Sign signature service.

Set up Authentication

Four authentication options are available: Built-in authentication, Active Directory, Windows Login, and Headers authentication.

Task 5a: Set up Built-in Authentication

Without User Accounts

This authentication method allows a user to browse the eForms Central library as a guest. Select this authentication method if internal and outside users will access the eForms Central library or if Netscape is your browser. Users who do not have an eForms Central library user account cannot sign forms that open in a browser window; however, they can sign forms that open in Desktop eForms.

If you are using the Built-in authentication method, please read the following user account information before you configure the library.

Users without user accounts can browse only the Blank Forms page.

With User Accounts

This authentication method allows users to create their own accounts or you can create accounts for them.

If you are using the Built-in authentication method, please read the following user account information before you configure the library.

Creating User Accounts

You can allow users to set up their own accounts or you can create the accounts for them. See the Forms Manager *Administrator Help* for details about creating accounts.

NOTE Support is not provided for generating accounts automatically. To generate accounts automatically, you must write the appropriate code and prepare the associated tables.

Updating Account and Personal Information

If you select Built-in authentication and the Accounts Required option, you can also select the options that allow users to update their account and personal information. With both options selected, users can change any of the values in the Account Information dialog box (First name, Last name, Email, User name, New password, and Confirm password). Changes that users make in the Account Information dialog box are reflected automatically in the Personal Information form. The reverse is also true: changes that users make in the Personal Information form are reflected automatically in the Account Information dialog box.

If you do not allow users to update their account information, they can change only the password in the Account Information dialog box. Although they can edit any of the fields in the Personal Information form, these changes are not reflected in the Account Information dialog box.

Enter the appropriate information in the fields on the Authentication page:

Field	Description
Account Required	Specifies that a user must have an account to use an eForms Central library.
Allow Account Administration	Allows users to manage their accounts in an eForms Central library. The Account Information dialog box is launched when the user clicks Account Info on the navigation bar.
Allow Personal Info Administration	Allows users to manage their personal information in an eForms Central library. The personal information form is launched when the user clicks Personal Info on the navigation bar.
Personal Info Template ID	Create a template ID for your Personal Information template. See the <i>Forms Designer Help</i> for information about the Personal information template and template IDs.
First Name Cell	The name of the cell that stores the user's first name as it appears in the Personal Information template.
Last Name Cell	The name of the cell that stores the user's last name as it appears in the Personal Information template.
Email Cell	The name of the cell that stores the user's email address as it appears in the Personal Information template.
Allow Saving of Form Data	Allows users to save forms to their My Forms page.
Maximum Number of User Accounts displayed while browsing	The maximum number of user accounts that can be displayed per page in the browser. The default is 30.
Forgot Password Sender	The address of the email account that is used to send an email message in response to a Forgotten Password request.

Task 5b: Set up Active Directory Authentication

This method authenticates according to user groups set up in Active Directory. Internet Explorer is required. When creating an Active Directory schema, it is recommended that you use Domain Global Security groups or Domain Global Distribution groups in the configuration instead of Domain Local groups.

Set up the following user groups in Active Directory:

- Form Administrators
- General Users

These groups can be named according to your naming standards. In addition to existing as a group on its own, the Form Administrators must be part of General Users. You can have multiple groups of General Users and Form Administrators.

For Active Directory authentication to work, the Active Directory user property for "E-mail" must be set with the user's email address. In most cases, the user property will pre-populate from your organization's email service. If necessary, you can set the 'E-mail' property manually for each user using the Active Directory Users and Computers administrative tool. In the Properties dialog box for each user, click the General tab and enter the user's email address in the 'E-mail' field.

NOTE Forms Manager Server stores security IDs (GUID) in its database. Up to 6 SubAuthority values are supported for each GUID. For more information about Active Directory and GUIDs, see the Microsoft documentation.

User names and passwords are encrypted. FileNet recommends that you also use SSL to encrypt the HTML pages. The extra encryption may result in slower service.

Enter the appropriate information in the fields on the Authentication page:

Field	Description
Supported Domains	<p>Click to select the domains that can be used by the Forms Manager Server to authenticate the eForms Central library users.</p> <ol style="list-style-type: none"> 1. In the Domain Entry dialog box, select a domain from the Domain drop-down list. <p style="text-align: center;">Or</p> <p>If you have credentials for a domain that is not in the list, enter the domain name in the Domain drop-down list.</p> <ol style="list-style-type: none"> 2. Enter the user name and password of the person who is authorized to access this domain. This person must be able to access the “memberOf” attribute. 3. Click OK. The Select Supported Domains dialog box appears, and the domain that you entered appears in the Supported Domains list.
Add	Click to add a domain.
Edit	Click to edit the properties of a domain.
Remove	Click to remove a domain.
General Users	<p>Use to select the appropriate General Users groups.</p> <ol style="list-style-type: none"> 1. In the Select General Users Group dialog box, click Add. The Select General Users dialog box displays all the General Users groups. 2. Select the appropriate groups and click OK. The complete LDAP path is displayed in the Select General Users Group dialog box. 3. Click Done. <p>The number of groups selected is displayed below the General Users button.</p>
Form Administrators	<p>Use to select the appropriate Form Administrators groups.</p> <ol style="list-style-type: none"> 1. In the Select Form Administrators Group dialog box, click Add. The Select Form Administrators Group dialog box displays all the Form Administrators groups. 2. Select the appropriate groups and click OK. The complete LDAP path is displayed in the Select Form Administrators Group dialog box. 3. Click Done. <p>The number of groups selected is displayed below the Form Administrators button.</p>

Field	Description
Allow Saving of Form Data	Allows users to save forms to their My Forms page.

Cell Names/Active Directory Property Table

The Cell Names/Active Directory Property table can be used to map Active Directory user properties to cell names on an ITX Form Template. When a user clicks the ITX Form Template's icon in the library, the form opens in the browser window with the contents of these cells pre-filled.

The properties that are available for mapping depend on how the Active Directory is set up in your organization. Before you enter values in the Cell Names/Active Directory Property table, you need to know the following:

- The cell names that the form author intends to use on the ITX Form Templates.
- The names of the user properties that are supported in your organization's Active Directory (e.g., "ln" for last name).

NOTE You can use ADSI Edit (available on the Windows 2000 installation CD) to find out the names of Active Directory properties.

Field	Description
Cell Names	An entry in the Cell Names column identifies a cell that can be pre-filled with the contents of the corresponding entry in the Active Directory Property column. The template must have a cell with the same name as the cell name in this table.
Active Directory Property	The contents of an entry in this column pre-fill a cell on a template.
Add	Click to add a cell name and Active Directory property.
Edit	Click to edit a cell name and Active Directory property.
Remove	Click to remove a cell name and Active Directory property.
Allow Saving of Form Data	Allows users to save forms to their My Forms page.

Task 5c: Set up Windows Login Authentication

For Windows 2000, this method authenticates according to user groups set up in Windows.

Enter the appropriate information in the fields on the Authentication page:

Field	Description
Allow Account Administration	Allows users to manage their accounts in an eForms Central library. The Account Information dialog box is launched when the user clicks Account Info on the navigation bar.
Allow Personal Info Administration	Allows users to manage their personal information in an eForms Central library. The personal information form is launched when the user clicks Personal Info on the navigation bar.
Personal Info Template ID	Create a template ID for your Personal Information template. See your <i>Forms Designer Help</i> for information about template IDs.
First Name Cell	The name of the cell that stores the user's first name as it appears in the Personal Information template.
Last Name Cell	The name of the cell that stores the user's last name as it appears in the Personal Information template.
Email Cell	The name of the cell that stores the user's email address as it appears in the Personal Information template.
Allow Saving of Form Data	Allows users to save forms to their My Forms page.
Maximum Number of User Accounts displayed while browsing	The maximum number of user accounts that can be displayed per page in the browser. The default is 30.
Administrator Account	The initial account for administering user accounts.

When you've finished creating a library, the Library Folder Security dialog box appears. Click **Yes** to open a new Windows Explorer window. The Library folder will be selected. Use the Security panel of the Properties dialog box to set the security permissions on the Library folder.

If you click **No**, you can set the security permissions later. The eForms Central library will not function until these permissions are set.

If users will be signing forms using the I-Sign signature service, and you configure the library with Windows Login authentication, you must configure the ASPNET user to "act as part of the operating stem."

To configure an ASPNET user

1. Choose **Start > Settings > Control Panel > Administrative Tools**. For Windows 2003, choose **Start > Control Panel > Administrative Tools**.
2. Double-click the "Local Security Policy" folder.
3. Expand the "Local Policies" folder.

4. Select **User Rights Assignment**.
5. Double-click **Act as part of the operating system**.
6. Select the ASPNET user from the list and click **Add**.
7. Click **OK**.
8. Close all the dialog boxes; then restart the server.

Task 5d: Set up Headers Authentication

With the Headers authentication method, your organization can use a third-party authentication system.

Option	Description
Allow Personal Info Administration	Allows users to manager their personal information in an eForms Central library.
Personal Info Template ID	Create a template ID for your Personal information template. See your <i>Forms Designer Help</i> for information about template IDs.
First Name Cell	The name of the cell that stores the user's first name as it appears in the Personal Information template.
Last Name Cell	The name of the cell that stores the user's last name as it appears in the Personal Information template.
Email Cell	The name of the cell that stores the user's email address as it appears in the Personal Information template.
Allow Saving of Form Data	Allows users to save forms to their My Forms page.
Authentication URL	The web browser address to the customer-provided page, secured by SSL, that validates the user name and password that are used to sign a form.

When headers are received from a third party system, they appear as shown in the next table. These headers establish the user's identity in Forms Manager.

Type	Header Name	Description
Authentication	EForms-UserName	A unique username for the user. This value matches the user's personal information record in the Forms Manager database. A new record is automatically created if there is no match found.
Authentication	EForms-FirstName	The user's first name.
Authentication	EForms-LastName	The user's last name.
Authentication	EForms-Email	The user's email address.
Authorization	EForms-Roles	The user's role. The user can belong to the "design" group for form authors, otherwise if this value is left blank or if the header is missing, the user is assigned to the general user's group.

NOTE When you create lookup, submit, or auto-increment requests, you can declare additional eForms headers and have those headers propagate through the requests. Headers must be specified with the prefix "EForms-".

There are 3 steps performed in setting up Headers Authentication:

1. Browser Authentication.

When connecting from a web browser, all requests must pass the header values (as shown in the table above). After the third party product checks for the user-agent, e.g., Internet Explorer, it checks for the headers. If the headers are missing, the user is prompted for login information.

2. Forms Designer and Desktop eForms Authentication.

With Forms Designer integration, the Designer application passes a user-agent header value of "Informed/1.0" to any web server. If the third party product does not receive the expected header value based on its detection of Forms Designer/Desktop eForms, an application status code response must be sent, e.g., "Error 401 - Unauthorized", which indicates that user authentication is required. The status code appears with a "WWW-Authenticate:" response header, e.g., WWW-Authenticate: Basic realm="SecureWebSite" where 'Basic' refers to the authentication method and the 'realm' parameter displays the website name. Other authentication methods are "NTLM" (Windows) and IDes (Forms Designer).

For IDes authentication, a dialog box appears that prompts for a username and password in order to access the website realm. The username and password are entered in a Forms Manager dialog box prompt and then passed along with an Authorization header, e.g., "Authorization: IDes *jnelson:password*", where *jnelson:password* is encoded as Base64. If the request cannot be made with https, the Basic authentication should be used instead.

If the login is unsuccessful, the 401 status code as explained in step 1 will cause the login dialog box to reappear. If the login is successful, a standard session cookie is created and will be passed along for future requests.

3. I-Sign Signature Authentication.

A custom authorization page secured by SSL must be provided. After the username and password is entered, the page must return an appropriate status code and message. With a successful login, the page should return the “200 OK” status code and message while a failed login should return a status code with message, e.g., “I-Sign returned the following error: 600 Invalid login credentials” or “I-sign returned the following error: 404 page not found”. If the login is successful, the user’s identity for the digital signature is established.

Set up the Database

The eForms Central library requires the Forms Manager database. This database contains all the Forms Manager-related data. There are two options for your database: SQL Server and Other. The name of the database should be unique for each library.

On a single server, you can create multiple libraries, each with its own database. If you want multiple libraries to access the same information, and if the libraries are configured with the same authentication method, you can create a single database.

NOTE If you set up a single database for multiple libraries that use different authentication methods, you cannot prevent users from being able to view each other’s data.

Task 6a: SQL Server

This option specifies that an SQL Server database will be used. For performance reasons, this option is preferred over the connection string method. The eForms Central Manager uses this information to create a SQL database and a SQL script file. The script can be used to re-create your database.

The authentication method for the SQL Server must be “SQL Server and Windows.” If you don’t set the authentication method during installation of SQL Server, you can set it using the FileNet Enterprise Manager. Select the **Sequel Server Authentication** option and enter a password.

Field	Description
Server Name	The DSN or IP address of the machine that is running SQL Server. NOTE If you will be using ODBC lookups and auto-increments on forms, you must enter a system DSN here, not a user DSN.
Database	The database on the server that an eForms Central library connects to.
User Name	The name of the account used to access the database.
Password	The password of the account used to access the database (optional).

Task 6b: Other

This option specifies that an OLE DB.Net provider for a database system will be used (e.g., Access).

Field	Description
Connection String	The connection string to the database.

Task 7: Set up Mail

If your eForms Central library is configured for Active Directory and Windows Login authentication, Windows (NTLM) authentication is applied. For Built-in authentication and Headers authentication, anonymous authentication is applied.

Field	Description
SMTP Server	The name (address) of the SMTP Server used to send links to forms.
Port	The port that the SMTP Server listens to. The default is 25.
Relay Messages	When selected, this option indicates that the server will relay messages sent by library users. The SMTP server must be set up to allow relaying of messages for this to work. Default.
Send from this Address	When selected, this option instructs the Forms Manager Server to send user mail from the address entered in the associated field. This address is used for all the mail that a user sends.
Max Recipient Matches	The maximum number of potential matches that can be returned when a user enters part of a name in the 'To' field of an email message. The default is 100.

Task 8: Set up Desktop Clients

Enter information on this page only if the eForms Central library users will be filling out forms with Desktop eForms. If you are using custom installers, place them in the **Forms Manager\Libraries\[Library name]\Config** folder and change the links in the fields accordingly.

Field	Description
Windows Installer URL	Displays the default URL to the Windows installer for Desktop eForms. Modify this field if you are using a custom installer. If you do not want to include a link to the Windows Desktop eForms installer, delete the default path in the Windows Installer URL field.
Macintosh Installer URL	Displays the default URL to the Macintosh installer for Desktop eForms. Modify this field if you are using a custom installer. If you do not want to include a link to the Macintosh Desktop eForms installer, delete the default path in the Macintosh Installer URL field.
Add link to Installers on Software page	Adds link to the installers on the Software page. Users who must install their own copy of Desktop eForms need the Windows or Macintosh link.
Add link to Distribution Center Profile on Software page	Adds link to Distribution Center Profile on Software page. Form authors need this link. Users who have Desktop eForms installed but do not have a distribution center profile also need this link.

Task 9: Set up Error Handling

On the Error Handling page select or deselect the following checkboxes:

Checkbox	Description
Add Debugging information to Error Messages	Specifies that debugging information will be added to error messages.
Record Errors in Event Log	Specifies that errors will be recorded in a log file.

Task 10: View Your New Library

To view your new library

1. Launch your browser.
2. In the address field, enter **http://[server name]/[Library name]** or **https://[server name]/[Library name]**. If you changed your port from the default of 80 or 443, the port number must be added to the address field.

Task 11: Remove an eForms Central Library

To remove an eForms Central library

1. Start eForms Central Manager.
2. In the Existing eForms Central library field, select the library you want to remove.
3. Click **Remove**. A confirmation message appears.
4. Click **OK** to continue.

NOTE You must restart IIS to delete any bindings to any files when you delete the virtual webshare.

Customize the Library Interface

The library user interface can be customized by modifying certain installed files. Changes to these files may affect the banner, home page, and personal information template. You can also show or hide the home page; add custom links to the sidebar and banner; add, delete, and change the order of the columns; and point to an alternate style sheet.

NOTE Once a library has been configured, if you later re-configure it using the eForm Central Manager application, changes you made in the Library.config file are preserved. For example, if you set a different home page or point to an alternate style sheet, these customizations are not overwritten. These customizations are also preserved when you upgrade.

Task 12a: Banner

The banner spans the top of the eForms Central library window, below the browser toolbar. It typically includes the name you've chosen for the eForms Central library (e.g., Sales eForms Central library), a logo, and a background image.

Images used in the banner must be in a format that is supported by your browser (e.g., JPG, GIF).

NOTE If you want to change the banner background, font, color, logo, etc., use a custom stylesheet as described in [Task 12f Style Sheets on page 32](#). If you want to create your own code to customize the banner, follow the instructions below:

To customize the banner

1. Open the existing **Banner.inc** file in **Forms Manager\Libraries\[Library name]\Config\Inc** folder.
2. Edit the HTML file by adding your own code.
3. Save the file in the **Forms Manager\Libraries\[Library name]\Config\Inc** folder.

To add links to the sidebar or banner, see [Task 12d Customize Links on the Sidebar and Banner on page 31](#).

Task 12b: Home Page

The home page opens by default when users access a library. Your home page can include any information that your company wants to provide for the eForms Central library users. You may want to briefly describe the contents of the eForms Central library and the work processes for electronic forms and their associated documents.

To customize the home page

1. Open the existing **Home.inc** file in the **Forms Manager\Libraries\[Library name]\Config\Inc** folder.
2. Edit the HTML file by adding your own code.
3. Save the file in the **Forms Manager\Libraries\[Library name]\Config\Inc** folder.

To hide the home page

1. Open the existing **Forms Manager\Libraries\[Library name]\Library.config** file.
2. In the display tag: `<display startPage="home" showHomePage="True">` replace "True" with "False."
3. Edit the file.
4. Save the **Library.Config** file in the **Forms Manager\Libraries\[Library name]** folder.

Task 12c: Set the Start Page

The home page is the default start page. You can set the start page to display the Help, Software, Blank Forms, My Forms, Inbox, or Sent Forms page.

To change the default start page

1. Open the existing **Forms Manager\Libraries\[Library name]\Library.config** file.
2. In the display tag: `<display startPage="home" showHomePage="True">` replace "home" with "help," "software," "blankForms," "myForms," "inbox," or "Sent Forms."
3. Save the **Library.Config** file in the **Forms Manager\Libraries\[Library name]** folder.

Task 12d: Customize Links on the Sidebar and Banner

You can add customized links to the sidebar and to the banner. You may want to include links to websites that your company uses or to an intranet site. You can create a link for each language that is required, but all links point to the same IP address.

To add links to the sidebar and banner

1. Open the existing **Forms Manager\Libraries\[Library name]\Library.config** file.
 If you want a link to display in the sidebar (left side of frame), add a sidebar link tag. If you want a link to display in the banner (top of frame), add a banner tag. If you want a link to display in both locations, enter the link information in the sidebar and the banner tags.
2. Create a sidebar or banner tag below the `<sidebarWidth>` tag. To open the tag, type “`<sidebar>`” or “`<banner>`.”
3. On the next line, type “`<link type=>`” and enter “frame,” “window,” or “popup.” If you select “popup” as your link type, you can change the width and height of the popup. The default settings are “width=800” and “height=600.”
4. In the sidebar or banner tag, type “href=” and enter the path to your link.
5. In the sidebar or banner tag, type “text language=” and enter the language you want your link to appear in. For example, enter “en-US” for US English.
6. In the sidebar or banner tag, type “label=” and enter the display name for the link. For example, enter “NBA” as the display name for www.nba.com.
7. In the sidebar or banner tag, type “toolTip=” and enter the tool tip you want to display when the mouse pointer is hovered over the link.
8. To close the tag, type “`</sidebar>`” or “`</banner>`.” To check your code, view the examples below:

Example for adding a popup link in the sidebar.

```
<sidebar>
  <link type="popup" href="http://www.nba.com" width="800" height="600">
    <text language="en-US" label="NBA" toolTip="NBA Home Page"/>
  </link>
</sidebar>
```

Example for adding a frame and window link to the banner.

```
<banner>
  <link type="frame" href="http://www.Google.com">
    <text language="en-US" label="FileNet" toolTip="Google Home Page"/>
  <link>
  <link type="window" href="http://www.filenet.com">
    <text language="en-US" label="FileNet" toolTip="FileNet Home Page"/>
  </link>
</banner>
```

9. Save the **Library.config** file to the **Forms Manager\Libraries\[Library name]** folder.

Task 12e: Columns on List Pages

By changing the configuration of the columns on list pages, you can change how the information is displayed to users. You can add and delete column headings, but the columns widths must add up to 100% so they fit in the frame. You can also change the order, titles, and number of column headings that appear on the following pages in a library: the Blank Forms, My Forms, Inbox, Sent Forms, Accounts, and Tracking.

To change the order of columns on a list page

1. Open the existing **Forms Manager\Libraries\[Library name]\Library.config** file.
2. In the `<listColumns>` tag, modify the column names for the appropriate pages in the library.

For example, the default code for the general Blank Forms page is as follows:

```
<blankFormsGeneral>
  <column name="Title" width="34%"/>
  <column name="Type" width="33%"/>
  <column name="TemplateID" width="33%"/>
</blankFormsGeneral>
```

In the following example, “Title” was changed to “Name” and the widths of the columns are resized.

```
<blankFormsGeneral>
  <column name="Name" width="45%"/>
  <column name="Type" width="35%"/>
  <column name="TemplateID" width="20%"/>
</blankFormsGeneral>
```

3. Save the **Library.config** file to the **Forms Manager\Libraries\[Library name]** folder.

Task 12f: Style Sheets

If you want to change the font styles, sizes, or colors used throughout the library, you can point to a custom style sheet. Use the style sheet to override only the settings you want to change.

To point to your own style sheet

1. Create a style sheet and save it in the **Forms Manager\Libraries\[Library name]\Config** folder or create a **css** folder in the **Config** folder and save the style sheet in the **css** folder. You may want to save your style sheet to a different location, so it can be accessed by multiple libraries.

NOTE Do not replace or modify the default style sheet (**Forms Manager\Files\Server\css\Library.css**). If you save your style sheet here, it will be overwritten when you apply a Forms Manager upgrade. However, you can view the tags in the existing style sheet to see what styles can be changed in the library.

2. Open the **Forms Manager\Libraries\[Library name]\Library.config** file. In the `display` tag, type “`customStylesheet=`” and type the path to your custom style sheet.

Example

```
<display startPage="home" showHomePage="True" customStylesheet="http://localhost/test/
library.css">
```

3. Save the **Library.config** file to the **Forms Manager\Libraries\[Library name]** folder.

Task 12g: Personal Information Template

For the Built-in authentication and Windows Login (with user accounts required) method, you can select the 'Allow personal info administration' option. With this option in place, users can enter their personal information by displaying the Personal Info form and filling it out in their web browser.

A default Personal Information template is provided on the FileNet Forms Manager eForms Central Windows CD (in the Personal Info Template folder), but you may want to use Forms Designer to modify the default template or create a customized form. This would allow you to collect the kind of information required by your department or company. For more information see "About the Personal Information Template," in your *Forms Designer Help*.

Task 13: Set up Administrators

Important notes:

- For Built-in and Windows Login authentication, a default account administrator account is created when Forms Manager is installed. The account administrator modifies this account and sets up all users to use the eForms Central library.
- The first time the account administrator logs in to the eForms Central library, he or she must use the account that was created during the installation.

To log in the first time

1. In the **User Name** field, enter "Administrator."
2. In the **Password** field, enter "password."
3. Click **OK**.
4. On the navigation bar, click **Account Info**.
5. In the Account Information dialog box, change the user name on the account (optional) and the password to prevent access by users who are not authorized.
6. In the **Email** field, enter your email address.
7. Click **OK**. If the Built-in authentication (with accounts) or Windows Login method is being used for the library, the account administrator may create the user accounts. An alternative is to allow General Users to create their own accounts when they log in for the first time.

NOTE For Windows Login, the default account administrator is specified on the Authentication tab in the eForms Central library in the **Account Administrator** field.

Task 14: Download Distribution Center Profiles

Form authors must download eForms Central distribution center profiles whether they are designing templates for use in a web browser or on the desktop.

To download the distribution center profile

1. Enter **http://[Server name]/[Workplace name]/GetProfile.aspx** in the browser **Address** field and press **Enter**.

Or

2. Log in to the eForms Central library.
3. Click the **Software** button.
4. Click the link to download the distribution center profile.

General Users

General users can follow the above steps to download the distribution center profile. They also need instructions about whether they will create their own accounts or use accounts created for them.

Install Forms Designer

This section gives detailed instructions on how to install the Forms Designer and Desktop eForms applications and their associated files on Windows and Macintosh computers.

Installation is done with an easy-to-use installer application that you'll find on the CD. While the installation process differs slightly between Windows and Macintosh, the installation options are the same. Forms Designer and Forms Manager installers are provided on separate CDs.

See "[FileNet Forms Manager Documentation](#)" on page 8 of this guide for a description of the documentation that is available for this product.

NOTES

- Before you install Forms Designer retrieve the following from the [FileNet Worldwide Customer Support web site](#) for the required versions, service packs, and fixes for third-party software:
 - [FileNet Forms Manager 4.2.0 Hardware and Software Requirements](#)
 - [Forms Manager Release Notes](#)
- You can obtain [updates to the FileNet Forms Manager documentation](#) from the product documentation folder on the [FileNet Worldwide Customer Support web site](#).
- Informed Designer, Forms Designer, and eForms Designer cannot exist on the same machine at the same time.
- All user manuals are available on the eForms Central library Help page.

To install Forms Designer on

- Windows ([Task 15a on page 36](#)).
- Macintosh ([Task 15b on page 37](#)).
- Uninstalling Forms Designer

Task 15a: Install Forms Designer on Windows

The following sections explain the procedures for installing on Windows. On Windows 2000 and XP you must be logged in as an administrator to install software. We recommend that you exit all Windows programs before running the installer.

To install Forms Designer on a Windows Machine

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

If the CD does not launch automatically, double-click your CD drive icon to show the contents of the CD. Open the Forms 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. If you do not want to display the readme file, clear the checkbox on the final page.

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 setup type that best suits your installation needs: Complete Setup or Custom Setup. You select one of these options on the Setup Type screen 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:

- The Forms Designer and Desktop eForms applications appropriate for the computer you're installing on.
- All eForms plug-ins.
- Spell checking and online Help.

Custom Setup

If you're an advanced user or a system administrator, you may want to choose which features to install and where you want them installed.

1. 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.

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**.

3. If you want to change the application's default destination folder, click **Change**.
4. Click **Next** to continue.
5. Click **Install** to install Forms Designer; then click **Finish** to quit the installer.

Task 15b: Install Forms Designer on Macintosh

You must be logged in as an administrator to run the installer, and you should copy the installer to your local machine before you run it. If you try to install from a network, you may see an error message.

To install Forms Designer on a Macintosh machine

1. Insert the CD into your computer.
2. If the CD browse page launches automatically, follow the instructions to locate the installer.
If the CD does not launch automatically, double-click your CD drive icon to show the contents of the CD. Open the Forms Designer folder. Double-click the Forms Designer Install icon to launch the installer.
3. The Setup program leads you through the installation process. Follow the instructions on the screen.

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

NOTE Desktop eForms no longer requires a registration number.

After you click **Install** to install the application, you are prompted to enter your user name and company. When the installation is finished, a message appears informing you that the installation was successful.

If you have installed all the items you need, click **Quit** to quit the installer. If you wish to change the installation options you chose, click **Continue** to repeat the installation process.

Installation Options

The installer allows you to choose the installation method that best suits your needs: Easy Install or Custom Install. You select one of these options in the drop-down list at the top of the Installer window.

Easy Install

If you select the **Easy Install** option, the installer application automatically installs the following standard program features:

- The Forms Designer and Desktop eForms applications appropriate for the computer you're installing on.
- All eForms plug-ins.
- Spell checking and online Help.

Custom Install

If you're an advanced user or a system administrator, you may want to choose which features to install and where you want them installed.

1. Select **Custom Install** from the drop-down list at the top of the Installer window.
2. Select or clear checkboxes for the features you want to install. Click the arrow to the left of the feature's name to view a drop-down list of installation options for that feature.
3. To read a description of the feature and its disk space requirements, click the Information icon to the right of the feature's name.
4. If you want to change the application's default install location, select **Select Folder** from the **Install Location** drop-down list. Browse to select an existing location for the installation folder, or click **New Folder** to create a new destination folder.
5. Click **Install** to continue.

Uninstall Forms Designer

When you uninstall Forms Designer, (using **Settings > Control Panel > Add/Remove Programs**), folders that were not part of the original installation are not removed. If you want to remove the following folders, delete them manually:

- **My Forms folder**
 - On Windows 98SE, 2000, and XP Pro: **My Documents\My Forms**.
 - On Macintosh OS 9.2.2 and X: **Documents\My Forms**.
- **Templates folder**
 - On Windows 98SE, 2000, and XP Pro: **My Documents\My Forms\Templates**.
 - On Macintosh OS 9.2.2 and X: **Documents\My Forms\Templates**.
- **Working folder**
 - On Windows 98SE, 2000, and XP Pro: **My Documents\My Forms\Working**.
 - On Macintosh OS 9.2.2 and X: **Documents\My Forms\Working**.
- **Preferences**
 - On Windows 98SE, 2000, and XP Pro: **Documents and Settings\[user name]\Application Data\FileNet\Forms**.
 - On Macintosh 9.x: **System/Library/Preferences/FileNet\Forms**.
 - On Macintosh OS X: **[Username]\Library/Preferences/FileNet\Forms**.
- **Application Preferences**
 - On Windows, in the Registry Editor window:
 - **HKEY_CURRENT_USER\Software\FileNet\Forms**.
 - **HKEY_LOCAL_MACHINE\Software\FileNet\Forms**.

- On Macintosh OS X: **Library\Preferences\Network and [Username]\Library\Preferences\com.filenet.eforms.plist.**
- On Macintosh OS 9.x: **System Folder\Preferences\com.filenet.eforms.plist.**

Install Desktop eForms

Important notes:

- Before you install Forms Designer retrieve the following from the [FileNet Worldwide Customer Support web site](#) for the required versions, service packs, and fixes for third-party software:
 - [FileNet Forms Manager 4.2.0 Hardware and Software Requirements](#)
 - [Forms Manager Release Notes](#)

NOTES

- You can obtain [updates to the FileNet Forms Manager documentation](#) from the product documentation folder on the [FileNet Worldwide Customer Support web site](#).
- This section gives detailed instructions on how to install the Desktop eForms application and its associated files on Windows and Macintosh computers.
- Installation of Desktop eForms is done with an easy-to-use installer application that you'll find on the Forms Designer CD. While the installation process differs slightly between Windows and Macintosh, the installation options are the same.

To install Desktop eForms on

- Windows ([Task 16a on page 41](#)).
- Macintosh ([Task 16b on page 42](#)).
- Uninstalling Desktop eForms

Task 16a: Install Desktop eForms on Windows

The following sections explain the procedures for installing Desktop eForms on Windows. We recommend that you exit all Windows programs before running the installer.

To install Desktop eForms on a Windows machine

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

If the CD does not launch automatically, double-click your CD drive icon to show the contents of the CD. Open the Desktop eForms folder. Open the second Desktop eForms folder. Double-click the Setup.exe icon to launch the InstallShield Wizard.
3. The Setup program leads you through the installation process. Follow the instructions on the screen.

NOTE Desktop eForms no longer requires a registration number.

After installation, a message informs you that installation was successful. If you have installed all the items you need, click **Quit** to quit the installer. If you wish to install more items, click **Continue** and repeat the installation process to install the desired items.

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. However, in order to sign forms using the Microsoft CSP signing service, 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 setup type that best suits your installation needs: **Complete Setup** or **Custom Setup**. You select one of these options on the Setup Type screen 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:

- The Forms Designer and Desktop eForms applications appropriate for the computer you're installing on.
- All eForms plug-ins.
- Spell checking and online Help.

Custom Setup

If you're an advanced user or a system administrator, you may want to choose which features to install and where you want them installed.

1. 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.

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**.

3. If you want to change the application's default destination folder, click **Change**.
4. Click **Next** to continue.

Task 16b: Install Desktop eForms on Macintosh

You must be logged in as an administrator to run the installer, and you should copy the installer to your local machine before you run it. If you try to install from a network, you may see an error message.

To install Desktop eForms on a Macintosh machine

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

If the CD does not launch automatically, double-click your CD drive icon to show the contents of the CD. Open the Desktop eForms folder. Open the second Desktop eForms folder. Double-click the Desktop eForms Install icon to launch the InstallShield Wizard.
3. The Setup program leads you through the installation process. Follow the instructions on the screen.

NOTE Desktop eForms no longer requires a registration number.

Installation Options

The installer allows you to specify **Easy** or **Custom** install. You select either of these options from the drop-down list at the top of the main installer window.

Easy Install

The default method of installation is **Easy** install. If you select this method, the installer application automatically installs the following items:

- Desktop eForms application appropriate for the computer you're installing on.
- All eForms plug-ins.
- Spell checking and on-line Help.

If you're an advanced user or system administrator and wish to change the installation configuration, choose **Custom Install**.

Custom Install

When you choose the **Custom Install** option from the drop-down list, the installer window changes to display installation options for you to select.

Select an item by clicking its checkbox. Some items have additional options that you can view by clicking the triangles to the left of the item names. You can obtain information about each option by clicking its corresponding 'information' button on the right.

After installation, a message informs you that installation was successful. If you have installed all the items you need and wish to quit the installer, click **Quit**. To install more items, click **Continue** and repeat the installation process to install the desired items.

Uninstall Desktop eForms

When you uninstall Desktop eForms, (using **Settings > Control Panel > Add/Remove Programs**), folders that were not part of the original installation are not removed. If you want to remove the following folders, delete them manually:

- **My Forms folder**
 - On Windows 98SE, 2000, and XP Pro: **My Documents\My Forms**.
 - On Macintosh OS 9.2.2 and X: **Documents\My Forms**.
- **Templates folder**
 - On Windows 98SE, 2000, and XP Pro: **My Documents\My Forms\Templates**.
 - On Macintosh OS 9.2.2 and X: **Documents\My Forms\Templates**.
- **Preferences**
 - On Windows 98SE, 2000, and XP Pro: **Documents and Settings\[user name]\Application Data\FileNet\eForms**.
 - On Macintosh 9.x: **System\Library\Preferences\FileNet\eForms**.
 - On Macintosh OS X: **[Username]\Library\Preferences\FileNet\eForms**.
- **Application Preferences**
 - On Windows, in the Registry Editor window:
 - **HKEY_CURRENT_USER\Software\FileNet\eForms**.
 - **HKEY_LOCAL_MACHINE\Software\FileNet\eForms** is also deleted.
 - On Macintosh OS X: **Library\Preferences\Network and [Username]\Library\Preferences\com.filenet.eforms.plist**.
 - On Macintosh OS 9.x: **System Folder\Preferences\com.filenet.eforms.plist**.

After You Install

Task 17: Edit the Personal Information Template

If you have upgraded from Informed Quadra version 4.0.1, 4.0.2, or 4.1 to Forms Manager version 4.2, run the eForms Central Manager application and edit the following eForms Central library settings after the installation is complete:

1. On the Authentication page, for Built-in authentication or Windows Login authentication, enter the template ID for the personal info template.
2. On the Desktop Clients page, ensure that the path to the Desktop eForms installer is correct.

Finally, deploy an ITX Form Template version of the personal info template to the upgraded eForms Central library.

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