

# **EMC<sup>®</sup> Documentum<sup>®</sup> Forms Builder**

Version 6

**Installation Guide  
P/N 300-005-241**

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# Table of Contents

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<b>Preface</b>	.....	5
<b>Chapter 1</b>	<b>Preparing for Installation</b> .....	9
	About Documentum Forms.....	9
	Supporting software requirements.....	10
	Content Server and Documentum repositories.....	10
	Connection brokers and the dfc.properties file.....	11
	Documentum Foundation Classes .....	11
	WDK application.....	12
	Documentum Application Installer .....	12
	Documentum Application Builder .....	12
	Java Runtime Engine .....	12
<b>Chapter 2</b>	<b>Installing Documentum Forms</b> .....	15
	Installing the Forms DocApp.....	15
	Installing the Forms Builder software.....	17
<b>Chapter 3</b>	<b>Upgrading Forms Builder</b> .....	19
	Overview of the Forms Builder upgrade process.....	19
	Upgrading Forms Builder 5.3 to release 6 .....	20
	Tasks to complete after upgrading Forms Builder .....	21
<b>Chapter 4</b>	<b>Postinstallation Tasks</b> .....	23
	Checking the Forms DocApp installation .....	23
	Giving users access to Documentum Forms.....	25
<b>Chapter 5</b>	<b>Uninstalling Forms Builder</b> .....	27
	Removing the Forms Builder software .....	27



## Purpose of this guide

This guide contains instructions for installing Documentum Forms Builder, the form template creation and editing tool that is installed on a Windows platform. This guide also explains the Forms DocApp, which sets up the object types and roles to create and use forms, and is installed on the Documentum Content Server. In addition, this guide provides information about upgrading the Forms Builder software from an earlier release to release 6.

Forms Runtime is installed as part of a standard installation of Web Development Kit (WDK) applications and is, therefore, not covered in this guide. Forms is supported by WDK, Webtop, TaskSpace, Records Manager Administrator, and Digital Asset Manager.

If you are installing Documentum Forms as part of Process Builder, you do not need to use this guide. Forms Builder is installed by the Process Builder installer, and the Process Builder DocApp will install all of the files and objects necessary for Documentum Forms.

## Intended audience

This guide is intended for administrators who install Forms Builder. The installation process requires installing a Documentum Forms DocApp and copying files onto the Content Server machine, so the user must have EMC Documentum superuser or administrator privileges. Once a EMC Documentum repository has been configured, any number of people can install Forms Builder on their computers.

## Organization

This guide contains the following chapters:

- [Chapter 1, Preparing for Installation](#)  
This chapter describes the tasks to be completed before installing Forms Builder.
- [Chapter 2, Installing Documentum Forms](#)  
This chapter describes how to install the Forms Builder software and the Forms DocApp.
- [Chapter 3, Upgrading Forms Builder](#)  
This chapter describes how to upgrade the Forms Builder software from version 5.3 to version 6.

- [Chapter 4, Postinstallation Tasks](#)  
This chapter describes any tasks that must be completed after Forms Builder is installed.
- [Chapter 5, Uninstalling Forms Builder](#)  
This chapter describes how to uninstall Forms Builder from the computer.  
An index is also included.

## Typographic conventions

The following text conventions are used in this guide.

### Typographic conventions

Convention	Meaning
<b>bold</b>	Boldface type indicates graphical user interface elements associated with an action, key names, or terms defined in text or the glossary.  Example: From the <b>File</b> menu, select <b>Adaptors</b> .
<i>Italic</i>	Italic type indicates book title, or emphasis in text.  Example: More information on installation is available in the <i>Forms Builder Installation Guide</i> .
Courier	Courier type indicates commands within a paragraph, code in examples, syntax examples, system output, filenames and pathnames (if shown on separate line), or text that you enter.  Example: <pre>public void destroy() throws AdaptorException;</pre>
<i>Courier Italic</i>	Courier italic type indicates variables in command strings or user input variables for which you supply particular values.  Example: All filenames have the format <i>&lt;template_name&gt;.xfrm</i>

## Support information

EMC Documentum's technical support services and policies are available at the EMC Powerlink website (<http://Powerlink.EMC.com>). To download the *Customer Guide to EMC Software Support Services* from Powerlink, select **Support > About EMC Customer Service > Software Customer Guide**.

To order printed documentation or access support information in Powerlink, select **Support > About EMC Customer Service > Software Support Offerings**.

**Note:** You must register online at Powerlink before using it.

## Related documentation

The following guides pertain to forms or to closely related subjects:

- *Documentum Application Builder Installation Guide*  
This guide explains how to install Documentum Application Builder.
- *Documentum Application Installer Installation Guide*  
This guide explains how to install Documentum Application Installer.
- *Documentum Content Server Administration Guide*  
This guide explains how to configure the connection broker information in Content Server.
- *Documentum Content Server Installation Guide*  
This guide explains how to install Content Server on a Windows host.
- *Documentum Content Server Release Notes*  
The release notes contain information on the supported operating system and database combinations for Content Server.
- *Documentum Foundation Classes Development Guide*  
A programmers guide to using DFC. This manual explains how to develop and deploy service-based business objects (SBOs) and modules.
- *Documentum Foundation Classes Installation Guide*  
This guide explains how to install or uninstall DFC on the computer.
- *Documentum Forms Builder Development Guide*  
This guide explains how to create and deploy custom adaptors in forms.
- *Documentum Forms Builder User Guide*  
This guide explains how to build forms without additional programming.
- *Documentum Forms Builder Release Notes*  
The release notes describes the specific hardware and software versions that are required for the installation for Forms Builder
- *Documentum Web Development Kit and Webtop Deployment Guide*  
This guide explains how to install a WDK application.

You can go to the Documentation area of the EMC Powerlink website (<http://Powerlink.EMC.com>) to download product documentation, white papers, or participate in the technical publications customer survey. To locate product

documentation, select **Support > Documentation and White Papers Library**, and then select your product.

## Revision history

The following changes have been made to this guide.

### Revision History

Revision Date	Description
August 2007	Initial publication

## Preparing for Installation

This chapter describes the Documentum Forms installations you can perform and issues to consider before installing the software.

This chapter contains the following topics:

- [About Documentum Forms, page 9](#)
- [Supporting software requirements, page 10](#)

## About Documentum Forms

Documentum Forms allows forms to be designed and used in a web client, with the resulting form data saved in an EMC Documentum repository.

Forms has three components:

- Forms Builder, which is installed on a Windows platform.

Forms Builder allows form designers to create and edit forms by selecting and configuring UI controls and viewing the resulting form in a Preview pane.

- Forms DocApp, which is included with the Forms product.

This DocApp installs the proper object types and roles (permission types) on a Content Server to enable the creation and use of forms.

- Forms Runtime, which is installed with WDK applications.

Forms Runtime allows forms to be displayed in a web client, and submitted form data is saved to a EMC Documentum repository. Forms Runtime includes Chiba, an open source Java implementation of the W3C XForms standard, which delivers Xforms functionality to browsers.

This installation guide includes instructions for the first two Forms components. The third, Forms Runtime, is installed as part of a standard installation of a WDK application.

## Supporting software requirements

Forms Builder is a client application that runs on the user's local Microsoft Windows computer and connects to Content Server using Documentum Foundation Classes (DFC). It is a Java application, and therefore, requires a Java Runtime Engine (JRE). The specific hardware and software versions that are required for the installation platform is described in the *Documentum Forms Builder Release Notes*.

Forms Builder depends on additional supporting software, which must be installed in order for the application to work properly. The supporting software includes Content Server and its associated database, a WDK application installed on an application server, and a browser client for the WDK application.

**Note:** If you install Forms Builder on a computer with other EMC Documentum products installed on it, most of the required supporting software will be in place. The *Documentum Forms Builder Release Notes* contains information about the supported software versions.

This section contains the following topics:

- [Content Server and Documentum repositories, page 10](#)
- [Connection brokers and the dfc.properties file, page 11](#)
- [Documentum Foundation Classes, page 11](#)
- [WDK application, page 12](#)
- [Documentum Application Installer, page 12](#)
- [Documentum Application Builder, page 12](#)
- [Java Runtime Engine, page 12](#)

## Content Server and Documentum repositories

Before installing Documentum Forms, install at least one Content Server and configure at least one EMC Documentum repository. Content Server provides content management services, including check in and check out, versioning, and archiving. All templates and form instances created with Forms Builder and WDK-based client applications are saved in a EMC Documentum repository. Forms Builder and Content Server need not be (and typically are not) on the same host machine.

More information on the supported operating system and database combinations for Content Server is available in the *Documentum Content Server Release Notes*. Complete information on installing Content Server is available in the *Documentum Content Server Installation Guide*. If you are upgrading an existing Content Server and EMC Documentum repository, review the sections on planning for an upgrade, preparing for an upgrade, and upgrading Content Server in the *Documentum Content Server Installation Guide*.

## Connection brokers and the dfc.properties file

Connection brokers provide EMC Documentum repository connection information to client applications. EMC Documentum repositories project their connection information to particular connection brokers, and client applications look to a specified connection broker for the available EMC Documentum repositories. Before you install Forms Builder, obtain the names of the connection brokers to which the appropriate repositories project and the port numbers on which the connection brokers listen.

The name of the connection broker is defined on the client computer in the `dfc.properties` file, installed as part of DFC. All Documentum applications installed on a Windows machine share the same `dfc.properties` file. On a Windows machine, this file is located in the `C:\Documentum\Config` folder. If a `dfc.properties` file does not already exist on the machine where you install Forms Builder, the installer asks for the name of the connection broker and the port number on which it listens and then creates the `dfc.properties` file. The default connection broker port is 1489.

To change the connection broker information after installation, edit the `dfc.properties` file on the machine where Forms Builder is installed. More information on the `dfc.properties` file and connection brokers is available in the *Documentum Content Server Administration Guide*.

## Documentum Foundation Classes

Installing Forms Builder also installs Documentum Foundation Classes (DFC) on the computer. DFC is an object-oriented application programming interface (API) and framework for accessing, customizing, and extending Documentum functionality, implemented as a set of Java interfaces and implementation classes, upon which the Documentum clients are built. More information on DFC is available in the *Documentum Foundation Classes Development Guide* and *Documentum Foundation Classes Installation Guide*.

During the Forms Builder installation you are asked whether you want to install developer documentation. This refers to the DFC JavaDocs. For normal use of forms, installing the developer documentation is not necessary.

If you have another Windows application installed on the Windows host, such as Documentum Desktop or Documentum Application Builder, the version of DFC that Forms Builder installs will be backwards compatible, and these applications are unaffected.

## WDK application

Form data can be gathered using Web Development Kit (WDK), Webtop, or Digital Asset Manager. These products are known as WDK applications, since they are all built on WDK. Version 6.0 of any one of these WDK applications should be installed on an application server. The Forms Runtime component is installed along with the WDK application. More information on installing a WDK application is available in the *Web Development Kit and Webtop Deployment Guide*.

## Documentum Application Installer

Installing Forms Builder also requires installing a DocApp in each EMC Documentum repository in which you will use the application. Documentum Application Installer (DAI) is required for installing DocApps. Documentum Application Installer is part of Documentum Application Builder; if you install Document Application Builder, Documentum Application Installer is included, but you can also install it separately.

To install a DocApp with Documentum Application Installer, you must log in to the EMC Documentum repository as a user with administration privileges. More information on installing Documentum Application Installer is available in the *Documentum Application Installer Installation Guide*.

## Documentum Application Builder

Documentum Application Builder (DAB) is a Windows product only. Use it to create DocApps in Windows or UNIX repositories and to view and edit the contents of the DocApp after creation.

To install a DocApp with Documentum Application Builder, you must log in to the EMC Documentum repository as a user with administration privileges. More information on installing Documentum Application Builder is available in the *Documentum Application Builder Installation Guide*.

## Java Runtime Engine

Forms Builder is a Java-based application and requires a Java Runtime Engine (JRE) on the computer. The installation program installs the required JRE along with

the application. By default, JRE is installed in the following location: C:\Program Files\Documentum\java.



# Installing Documentum Forms

If your system meets the hardware and software requirements listed in *Documentum Forms Builder Release Notes*, and the supporting software described in Chapter 1 is installed, you are ready to install the Forms Builder software.

**Note:** If you are upgrading the Forms Builder software to a new version, refer to [Chapter 3, Upgrading Forms Builder](#).

This chapter contains the following topics:

- [Installing the Forms DocApp, page 15](#)
- [Installing the Forms Builder software, page 17](#)

## Installing the Forms DocApp

To work properly, Forms Builder requires certain files and objects in any EMC Documentum repository to which it connects. You install these files and objects using a Documentum DocApp, which is an archived collection of Documentum Content Server objects. The files and objects required by Documentum Forms are located in the Forms DocApp. Install the DocApp in the global repository, and once in each EMC Documentum repository in which any user will run Forms Builder.

Install the DocApp from any machine with the latest version of Documentum Application Installer on the local machine. (*Documentum Forms Builder Release Notes* contains specific version requirements.) If Documentum Application Installer is not installed on the local machine, download and install it before running the procedure below.

You must be a superuser or EMC Documentum administrator to install a DocApp using Documentum Application Installer (DAI).

### To install the Forms DocApp:

1. Download the Forms DocApp from the following location:  
<http://Powerlink.EMC.com>

**Note:** The Powerlink website provides access to <https://EMC.subscribenet.com/control/dctm/index> where a complete listing of products is available for download.

2. Unzip the downloaded file, Forms\_Builder\_6.0.0\_Docapp.zip.  
The files comprising the DocApp are extracted into a subdirectory named Forms.
3. From the **Start** menu, select **Programs > Documentum > Application Installer**.  
The login screen for Documentum Application Installer appears.
4. Select the EMC Documentum repository into which you want to install the DocApp and log in as a superuser or administrator.  
Documentum Application Installer starts.
5. Click **Browse** from the DocApp folder selection section and navigate to the Forms directory containing the DocApp files (from step 2 above).
6. In the Installer Log section, type a log filename in the **File name** box; this step is optional. The default log filename is AppInstallerLog.html.  
Click **Browse** to select a directory other than the default to save the log file. You can refer to the log file for any errors that occur during the installation of DocApp.
7. Click **OK**.  
A dialog box appears, detailing the DocApp name, target repository, and the installation status.
8. Click **Start Installation**.  
The installation process takes a few minutes to complete. This is indicated in the dialog box that appears.
9. Click **OK**.  
If users are currently connected to the EMC Documentum repository into which you are installing the DocApp, a dialog box asks whether you want to continue with the installation. Click **Yes**. Users are not affected by the installation, but they will not see the changes made by the DocApp until they reconnect.
10. Repeat steps 3 through 9 for each EMC Documentum repository in which you plan to use Forms Builder.
11. Click **Quit Installer**.

**Note:** After you complete the installation of the Forms DocApp and the Forms Builder software, you must specify the global repository details in the dfc.properties file, if not already set.

# Installing the Forms Builder software

Install the Forms Builder software on the local machine for each user creating or modifying templates.

The installation program also installs a JRE and DFC, which Forms Builder uses to communicate with Documentum Content Server. If the machine has no other EMC Documentum software installed on it, the installation program asks you to choose a home directory for EMC Documentum software and to identify a connection broker that will enable the machine to locate Content Server hosts.

## To install Forms Builder:

1. Download the Forms Builder installer, Forms\_Builder\_<version>\_windows.exe. You should have received instructions through email regarding how to download products from the EMC Documentum download site at <http://Powerlink.EMC.com>.  
**Note:** The Powerlink website provides access to <https://EMC.subscribenet.com/control/dctm/index> where a complete listing of products is available for download.
2. Run the downloaded executable file to expand the compressed archive to a temporary directory.
3. Navigate to the temporary directory, and run the installation program. The installation program is dfbWinSetup.exe.  
A welcome screen appears, listing the products that will be installed.
4. Read the welcome screen, and then click **Next**.  
The EMC Documentum software license agreement appears.
5. Read the license agreement.
6. To continue with the installation, click **I accept the terms of the license agreement** and click **Next**.  
The next screen offers the option to install the developer documentation and a primary interop assembly for DFC.  
**Note:** If you do not accept the license agreement terms, the **Next** button is grayed out. You cannot continue with the installation.  
The next screen gives you the option to install the developer documentation and a primary interop assembly for Documentum Foundation Classes (DFC).
7. To install the DFC developer documentation, select **Developer Documentation**.
8. To request installation of a Microsoft installer package (.msi file) for the DFC primary interop assembly (PIA), select **Primary Interop Assembly Installer**, or leave the box unchecked if you do not wish to have the package installed.

If you select this option, the installer places the installation package for the DFC primary interop assembly into the setup directory of the DFC program root directory.

**Note:** Forms Builder does not require the Primary Interop Assembly.

9. Click **Next**.
10. If the machine has DFC installed on it, the installation program uses the existing values and does not display a screen asking for configuration information.  
If the machine has no other EMC Documentum software installed on it, enter basic configuration information for DFC. (This information is stored in the `dfc.properties` file on the local machine where the Forms Builder software is installed.)
  - a. Accept the default DFC program root directory (`C:\Program Files\Documentum`) or enter a different directory and click **Next**.
  - b. Accept the default user directory (`C:\Documentum`) or enter a different directory and click **Next**.
11. If prompted, enter a connection broker hostname and port number or accept the default and click **Next**.
12. Confirm the final installation settings and click **Next**.  
The installation program starts copying files to the appropriate locations. When the installation is complete, a message screen appears indicating a successful installation.
13. Click **Finish**.  
The installation program displays a reminder that you must perform additional installation steps to prepare a EMC Documentum repository for use with Forms Builder. You can now install a DocApp, as described in [Installing the Forms DocApp, page 15](#).

## Upgrading Forms Builder

You can choose to upgrade the Forms Builder software from an earlier release (5.3) to the current release (release 6).

This chapter contains the following topics:

- [Overview of the Forms Builder upgrade process, page 19](#)
- [Upgrading Forms Builder 5.3 to release 6, page 20](#)
- [Tasks to complete after upgrading Forms Builder, page 21](#)

### Overview of the Forms Builder upgrade process

The Forms Builder release 6 software contains a migration tool that you can use to upgrade an earlier version of the software. However, the migration tool *does not* migrate individual templates from the 5.3 object model to the release 6 object model. This is done by the Forms Builder software.

The migration tool migrates all templates in the repository that have adaptors associated with it. It establishes a relationship between the template and the adaptor configuration.

The migration tool works in the following order:

1. In the previous release, all template adaptors were grouped in the `adaptor_config.xml` configuration file in the `/System/Forms` folder in the repository. When migrating adaptor configuration information, the tool checks whether the subject attribute of the adaptor configuration file is marked. If it is marked, then the tool does not migrate the adaptor configuration information. This means the content of the configuration file has already been mapped to the corresponding release 6 `dmc_xfm_adaptor_config` object attributes. If the subject attribute is not marked, the tool continues with the migration process, as described in step 2.

2. The migration tool maps all XML elements and attributes from the adaptor configuration file to the corresponding release 6 `dmc_xfm_adaptor_config` object attributes.

## Upgrading Forms Builder 5.3 to release 6

This section guides you through the process of upgrading the Forms Builder 5.3 software to release 6.

Before upgrading the Forms Builder software, do the following:

- Ensure your system meets the software and hardware requirements, as described in [Supporting software requirements, page 10](#) and in the *Forms Builder Release Notes*.
- Uninstall the older version of the Forms Builder software, as described in [Chapter 5, Uninstalling Forms Builder](#). (If you uninstall all Documentum products from your local machine, the `dfc.properties` file will be removed. During the installation of the Forms Builder software, you must provide the DFC configuration information.)

### To upgrade Forms Builder:

1. Install the Forms DocApp, as described in [Installing the Forms DocApp, page 15](#).
2. Install the Forms Builder software, as described in [Installing the Forms Builder software, page 17](#).
3. Run the migration tool.
  - a. Open a **Command Prompt** window.
  - b. Navigate to the location where the Forms Builder software is installed. The software is typically installed at `C:\Program Files\Documentum\dfb`.
  - c. To start the migration tool, run the following command:

```
"C:\Program Files\Documentum\java\1.5.0_<version>\jre\bin\java.exe" -Dsun.java2d.noddraw=true -cp lib\classpath.jar;..\dctm.jar;"C:\Documentum\config"; com.documentum.xforms.utils.MigrateTemplatesToD6 -docbase <repositoryName> -username <userName> -password <password> -domain <domain>
```

**Note:** If you do not use a domain, then do not include the `-domain` option in the above command.

---

## Tasks to complete after upgrading Forms Builder

After you have upgraded the Forms Builder software, you must update the global repository connection database information. To do this, edit the following lines in the `dfc.properties` file on the machine where the Forms Builder software resides.

```
dfc.globalregistry.repository=<repositoryName>
dfc.globalregistry.username=<userName>
dfc.globalregistry.password=<password>
...
dfc.docbroker.host[0]=<IP_address_of_repository>
dfc.docbroker.port[0]=<port_number>
```

More information on the `dfc.properties` file and connection brokers is available in the *Documentum Content Server Administration Guide*.



## Postinstallation Tasks

This chapter describes any tasks that you may need to perform after installing Forms Builder and before it can be used.

This chapter contains the following topics:

- [Checking the Forms DocApp installation, page 23](#)
- [Giving users access to Documentum Forms, page 25](#)

## Checking the Forms DocApp installation

Use the following procedure to view the Forms DocApp installed onto one or more EMC Documentum repositories.

### To view the Forms DocApp:

1. From the **Start** menu, select **Programs > Documentum > Application Builder**.  
The login screen for Documentum Application Builder appears.
2. Type your administrator user name and password and click **OK**.  
The **New Application** dialog box appears.
3. Click **Open existing DocApp from Docbase**.  
The **Open Application** dialog box appears and displays the Applications folder.
4. Double-click the Forms folder.
5. Select **Forms**, and then click **Open**.  
The DocApp opens and is displayed in Application Builder.

The Forms DocApp includes the following files and objects that are required by Documentum Forms.

- Roles
  - form\_designer  
Required role for users who will design and edit forms in Forms Builder.
  - form\_user  
Required role for users who will create forms from templates.
- Formats
  - property  
File format for a resource.
  - xml  
File format of a form instance.
  - xsd  
File format for a form schema.
  - xfm  
File format of a template.
- Relation Types
  - dm\_xfm\_form\_baseform  
Describes the relationship between the current template and the base template; used when a form shares a data model with another form or is copied from another form.
  - dm\_xfm\_form\_schema  
Describes the relationship between the template and the XML schema.
  - dm\_xfm\_image\_form  
Describes the relationship between the template and the image. However, if a template does not contain any image, then a relationship is not created.
  - dm\_xfm\_instance\_form  
Describes the relationship between a template and the form instance.
  - dm\_xfm\_instance\_schema  
Describes the relationship between a form instance and the XML schema.
  - dm\_xfm\_layout\_form  
Describes the relationship between the template and the layout.
  - dm\_xfm\_resource\_form  
Describes the relationship between the template and the repository property.

- dm\_xfm\_xmlapp\_schema  
Describes the relationship between the XML schema and an XML application. A relationship is created only if a template is configured to store form data as XML content in the repository.
- dm\_xfm\_adaptor\_form  
Describes the relationship between the template and an adaptor. If a template does not have template adaptors associated with it, a relationship is not created.
- dm\_xfm\_adaptor\_schema  
Describes the relationship between the adaptor and the form schema.
- Folder
  - /System/Forms  
Used for storing templates.
  - /System/Forms/Images  
Used for storing images.
  - /System/Forms/Adaptors  
Used for storing template adaptors.

## Giving users access to Documentum Forms

Before using Documentum Forms, users must be assigned to one of two forms roles.

- form\_designer  
The form\_designer role is required for users who will use Form Builder to create, edit, validate, install, and obsolete templates. The form\_designer role has WRITE permission on all templates stored in /System/Forms.

The form\_designer role includes all the privileges of the form\_user role.

- form\_user  
The form\_user role is required for users who will create forms from templates. The form\_user role has READ permission on all forms stored in /System/Forms.

You add users to the form\_designer or form\_user role using Documentum Administrator.

### To add users to the form\_designer role:

1. Start Documentum Administrator and log in as a user with administrator privileges.
2. Navigate to **Administration > User Management > Roles** to access the Roles list page.

3. Double-click the `form_designer` role.  
The list page with members of the role is displayed.
4. Click **File > Add Member(s)**.  
The **Choose a user/group** page appears.
5. To jump to a particular user, group, or role, type the name in the text box and click **Go**.
6. To filter the page, select one of the following from the list box at the top of the page:
  - **Show Users, Groups, And Roles**
  - **Show Users**
  - **Show Groups**
  - **Show Roles**
  - **Show Private Groups and Roles**
7. Select the names of the users, groups, or roles you want to add to the role.
8. Click the right arrow.  
The selected members are moved to the list box on the right of the page.
9. Click **OK**.

Repeat the above procedure to add users to the `form_user` role, selecting `form_user` as the role in step 3.

# Uninstalling Forms Builder

Forms Builder is installed as a standard Microsoft Windows application. To remove the application from a computer, use the Add/Remove Programs option from the Windows Control Panel.

**Note:** The following procedure removes the Forms Builder software from a local machine. It does not uninstall the supporting objects from any EMC Documentum repositories to which you applied the Forms DocApp.

## Removing the Forms Builder software

The following steps describe how to remove the Forms Builder software from the local machine.

### To uninstall the Forms Builder software:

1. Close the Forms Builder application, if it is running.
2. From the **Start** menu, select **Settings > Control Panel**.  
The **Control Panel** appears.
3. Double-click **Add/Remove Programs**.
4. Select **Documentum Forms Builder** from the list of currently installed programs, and click **Change/Remove**.  
The uninstallation program starts. A screen appears showing a list of the software to be uninstalled.
5. Click **Next** to continue.  
A screen appears showing the file system location where the uninstallation program found the Forms Builder software.
6. Click **Next** to remove the application.
7. When the process is complete, click **Finish** to close the uninstallation program.

8. Close the **Control Panel**.

## A

Application Builder, 12  
Application Installer, 12

## C

connection broker, 11  
Content Server, 10

## D

dfc.properties, 11, 21  
DocApp, 12  
    installing, 15  
    objects, 23  
    verifying, 23  
Documentum Forms  
    Forms Builder, 9  
    Forms runtime, 9  
Documentum Foundation Classes  
    (DFC), 11

## F

Forms Builder  
    installing, 17  
    postinstallations tasks, 23  
    preinstallation tasks, 9  
    supported software, 10  
    uninstalling, 27  
    upgrading, 19

## I

installing  
    Application Builder, 12  
    Application Installer, 12  
    connection broker, 11  
    Content Server, 10  
    DFC, 11  
    DocApp, 15

Documentum repositories, 10  
Forms Builder, 17  
JRE, 12  
WDK application, 12

## J

JRE, 12

## P

postinstallation tasks, 23  
postupgradation tasks, 21  
preinstallation tasks, 9  
primary interop assembly, 17

## R

roles  
    adding users, 25  
    form\_designer, 25  
    form\_user, 25

## S

supported software  
    Application Builder, 12  
    Application Installer, 12  
    connection broker, 11  
    Content Server, 10  
    DFC, 11  
    JRE, 12  
    WDK application, 12

## U

uninstalling, Forms Builder, 27  
upgrading  
    Forms Builder, 19 to 20  
    overview, 19

## **W**

WDK application, 12