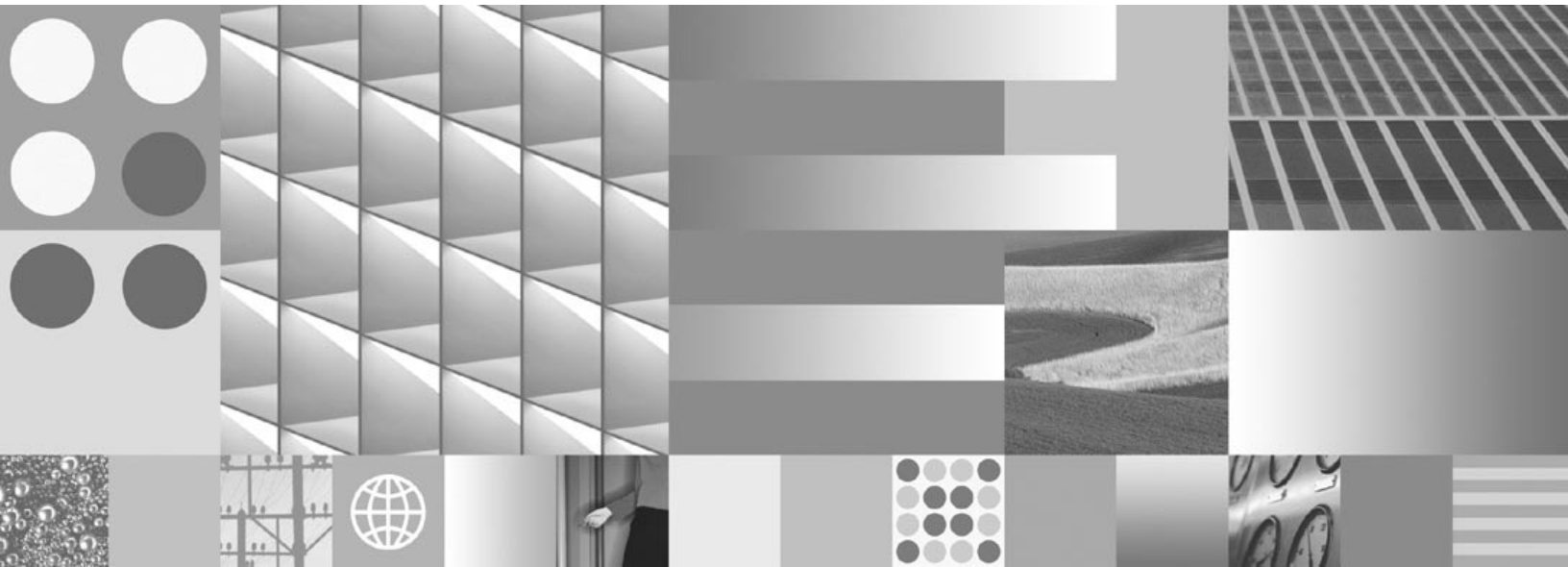


**eForms Integration to BPF**





**eForms Integration to BPF**

**Note**

Before using this information and the product it supports, read the information in “Notices” on page 59.

This edition applies to version 4.0 of IBM FileNet Business Process Framework (product number 5724-R75) and to all subsequent releases and modifications until otherwise indicated in new editions.

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# Contents

Revision Log .....	6
Overview .....	7
The eForms Tab.....	7
How to Configure the eForms Tab .....	7
Presentation of the eForms Tab.....	10
No eForm Attached to Case .....	10
The eForms Tab as a Replacement for the Case Tab .....	11
Synchronization of the eForm with Case Data .....	12
Using an eForm Tab.....	13
Editing an eForm.....	13
Saving an eForm.....	13
Closing an eForm.....	13
Action .....	14
BPF Search with eForms .....	14
eForm Case Creation Tool.....	15
Overview of the eForm Case Creation Tool.....	15
Access Methods for the eForm Case Creation Tool.....	15
Using the eForm Case Creation Tool .....	16
Configuring the Access Method of the eForm Case Creation Tool.....	17
Dropdown Option .....	17
Application Menu Item .....	18
Inbasket Menu Item .....	18
Configuring the eForm Case Creation Tool.....	20
Configuration files for eForms.....	20
Add the Form Template to P8 Workplace.....	20
Add Entry Template .....	25
Add a Form Policy.....	33
Process Engine Changes for eForms Integration .....	46
Transfer New Workflow Definition to Process Engine .....	46
Content Engine Changes for eForms Integration.....	50
Bp8PrimaryForm.....	50
Form Document Class and Properties.....	50
Create a Content Engine Workflow Subscription .....	51
Modifying Form Template.....	56
Updating Form Template P8 Workplace.....	56
Updating Form Policy in P8 Workplace .....	56
Updating BPF Application .....	56
Summary of BPF/eForms Configuration .....	56
Notices .....	59
Trademarks .....	60

## Revision Log

Date	Revision
Nov 2007	Made various changes throughout document to meet IBM requirements.
Mar 2007	Initial document for 4.0 release.
Nov 2007	Made various changes throughout document to meet IBM requirements.

## Overview

**NOTE** This document has not been updated for any new or changed functionality in BPF version 4.1.0. For information on new and changed functionality, see the *IBM FileNet Business Process Framework New Feature Addendum*.

This document focuses on the integration of IBM® FileNet® Business Process Framework (BPF) with FileNet eForms. It covers the following areas:

- The eForms Tab
  - How to configure and deploy the BPF eForms Tab for displaying eForms in a tab within an open Case in the BPF Web Application.
  - Using the eForm in the eForms Tab at runtime in the BPF Web Application.
- Searching BPF eForms Cases
  - Configuration changes required for the BPF CASEQUERY Inbasket to handle the opening of eForms Cases from the Search Results screen.
- The eForm Case Creation Tool
  - How to deploy and configure the BPF Form Template Case Creation Tool that is used for creating a new eForm and launching a Workflow that will create a new Case for it.

This document is intended for BPF application designers and developers who will be required to configure eForms Integration within BPF. It presumes that the reader understands and is experienced with BPF Explorer configuration, Content Engine configuration, the Process Designer tool, Workplace configuration, and eForm creation and design.

## The eForms Tab

### How to Configure the eForms Tab

In order to expose the eForms Tab structure to the BPF Explorer application, it first needs to be added to the BPF Meta database. For the Case Management sample application, this will occur automatically when the **bpf\_cm.xml** manifest is imported using BPF Explorer during the installation process. For other scenarios, this can be done manually by modifying the TABS table in the BPF Metastore and adding the following new record. When upgrading from BPF 3.5.2 to BPF 4.0 and adding eForm Integration, you must manually add the eForm Tab to the TABS table.

Use the following column values to create the eForms Tab entry.

Column	Description
TAB_ID	Incrementing number supplied by the RDBMS when a row is added to the TABS table.
TAB_NAME	eForms (The Display Name of the tab in the BPF Explorer Tool)
TOOL_TIP	eForms (Display Name of the tab in the BPF Inbasket User Interface)
HELP_CTX	Not currently used.
TAB_CONTENT	/BpfFormServlet?Bp8CaseID={CFNAME}&mode=1 (or mode=2)&page=1 Bp8CaseID = The macro {CFNAME} returns the value of the specified case field. In this instance, it would return the current case ID value.

Column	Description
	<p>Mode = Indicates the form mode.            1 = This will open the eForm in editable mode to allow updates. This mode will be used for Cases that are in process.            2 = This will open the eForm in a read-only mode. This mode will be used in the CaseQuery Inbasket. A read-only view will be provided by passing the PERMISSION_STATE value of the eForm API while fetching the eForm from Content Engine (CE).</p> <p>Page = This indicates the particular eForm page (tab) to be opened. If the page number specified does not exist in the eForm, then the first eForm tab will be opened by default.</p>
TAB_TYPE	2 (Numeric Value indicating eForm type of tab)

The BPF eForms Servlet will then fetch the eForm object from Content Engine (CE) based on the GUID value in Bp8PrimaryForm field of the Case object currently open in the BPF Web Application as soon as the eForms Tab is displayed.

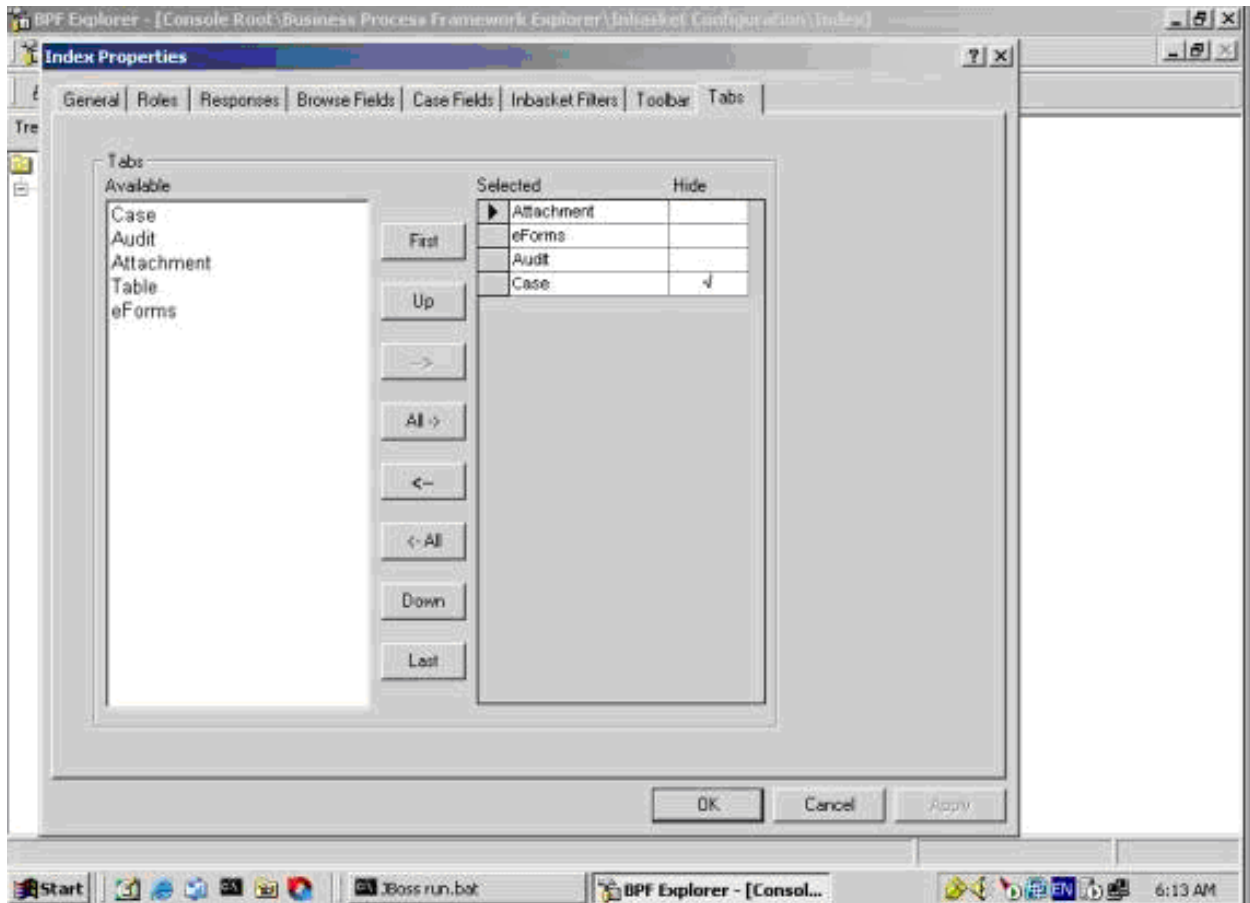
SQL Server Enterprise Manager

Data in Table 'TABS' in 'Bp8Metastore' on '(local)'

TAB_ID	TAB_NAME	TOOL_TIP	HELP_CTX	TAB_CONTENT	TAB_TYPE
1	Case	Case	<NULL>	CaseProps	0
2	Audit	Audit	<NULL>	Audit	0
3	Attachment	Attachment	<NULL>	Bp8AttachmentsTab.jsp?eventTarget=attachmentsTab&eventName=ExecuteSe	1
5	Table	Table	<NULL>	tableTab.jsp?layout=tableTabSample&TabName={TABNAME}&Inbasket={IID}&	1
6	eForms	eForms	<NULL>	/BpfFormServlet?Bp8CaseID={CFNAME}&mode=1&_showatt=0&page=P001	2



Once the configuration described above is complete, all that remains is to add the eForms Tab to those Inbaskets where it is required (as seen in the following screenshot) using BPF Explorer.



As will be explained further below, the “Hide” parameter seen here is provided for the purpose of allowing the Case Tab to be present, in a given Inbasket, for updates and synchronization with one or more eForms tabs - but without actually being visible to the user. This is the typical use case envisioned for the eForms Tab, whereby an eForm actually takes the place of the traditional Case Tab in terms of displaying the Case fields that a user needs to work with in a given Inbasket.

**NOTE** The eForm tab on the Case Management sample application (as configured by importing the bpf\_cm.xml manifest using BPF Explorer) will, by default, not be exposed on any Inbasket. Users will have to expose this tab on the Inbasket in order to see and use eForms functionality within the Case Management sample application.

The following describes the way in which BPF eForms synchronization is performed. When you change the value of an eForm form field that is displayed in the eForms Tab in BPF, the corresponding BPF Case field (on the Case Tab - hidden or not) is not updated until you have closed and reopened the Case from its current Inbasket or dispatched the Case by selecting an Action. Synchronization of values occurs at this point solely by virtue of both fields having the exact same name. Identity of names is the only thing that determines the correspondence between eForm form fields and BPF Case fields. The requirements for successful update and synchronization of the Case Tab are:

- that the Case Tab be present (hidden or not)
- that it expose those fields necessary for the user to perform his or her function in this Inbasket, and
- that the eForm(s) involved contain form fields whose names match *exactly* those of the Case fields involved.

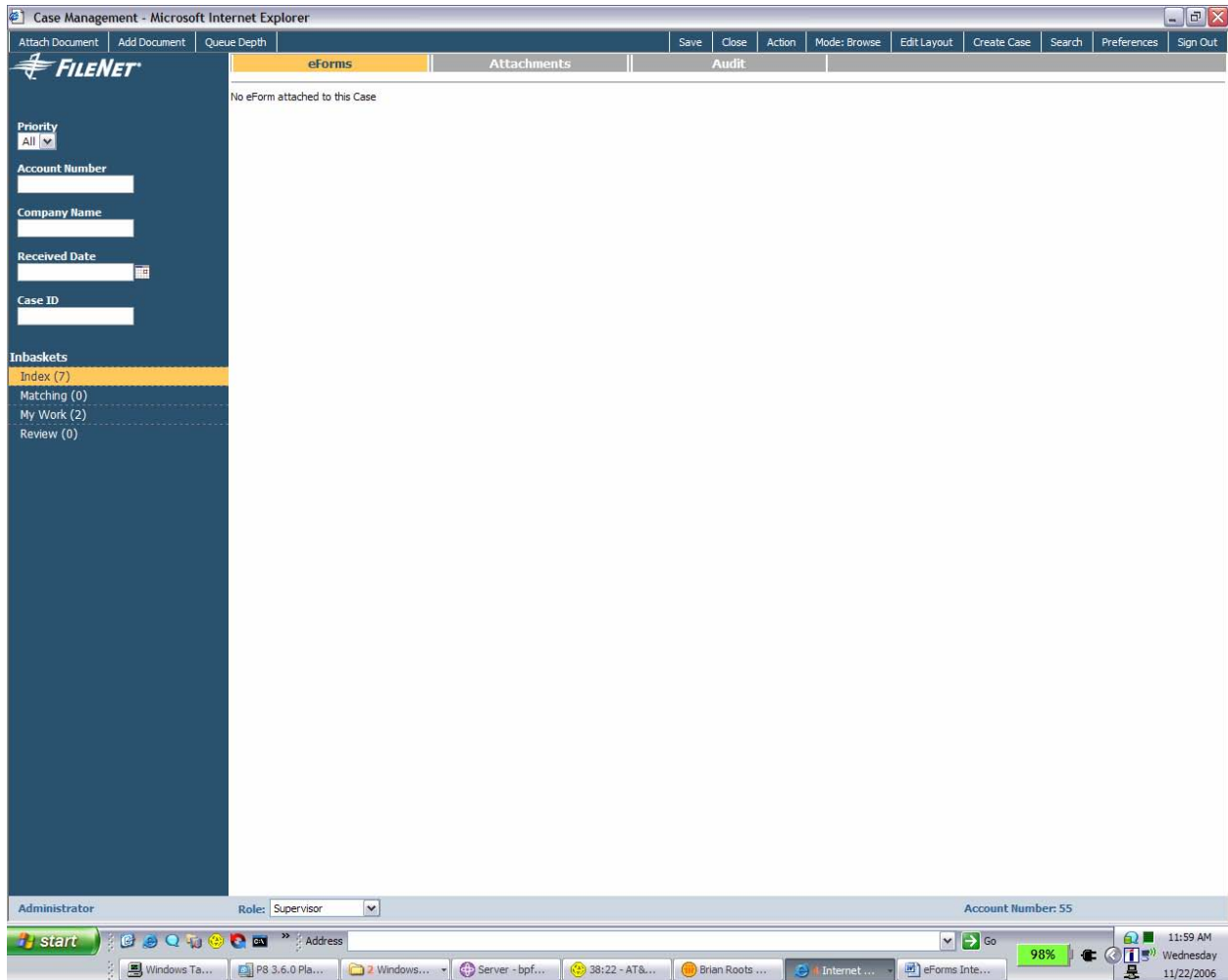
## Presentation of the eForms Tab

The end result of the configuration steps described above should be that the user will be able to view an eForm associated with the current Case in the eForms Tab as shown below:

## No eForm Attached to Case

If there is not an eForm attached to the current Case, the end user will see a “No eForm attached to this Case” message in the eForms Tab in the Web Application.

eForm documents in this context are *not* literally “attached to” the Case in the manner of traditional BPF attachments but rather *associated with* the Case through the following mechanism. BPF will search for an eForm associated with this case based on the value populated in the Bp8PrimaryForm field in the workflow map. This Bp8PrimaryForm field will contain the vsld of the eForm object version to be loaded in the tab. BPF will find the Id of the corresponding Content Engine Document object based on this vsld value and, if the document is found, BPF will open the eForm. Otherwise, BPF will display a message reading, “No eForms attached to this Case.” as shown in the example below.



## The eForms Tab as a Replacement for the Case Tab

The new eForms Tab can serve as a replacement for the traditional Case Tab. In this scenario, the Case Tab will typically be hidden using the "Hide" tab option on the Tabs tab in the Inbasket Configuration properties dialog in BPF Explorer. The eForms Tab will be configured as the first tab in place of the Case Tab. The Case Tab will still be available for any operation from BPF and to any custom plug-in code, but will not be visible within the BPF Web Application.

**NOTE** Synchronization does not work if the Case tab is not configured on the Tabs tab for this Inbasket (whether it is hidden or not).

## Synchronization of the eForm with Case Data

BPF Case field data (normally presented on the Case Tab) will be synchronized with eForm data based on the identity of the eForm form field name and BPF Case field name.

Synchronization Rules:

- If there are multiple tabs with the same field name on an eForm, then whichever form field is read last by the synchronization code will be the form field whose value is applied to the corresponding BPF Case field.
- The synchronization will be "one way" in the sense that eForm data will be applied to the Case object but changes made directly to the Case fields will not be synchronized to eForm fields.
- Case fields will have to be exposed for the current CaseType at the Inbasket level for this synchronization to occur even if the Case Tab is hidden. If the Case Tab is hidden then all the required fields on the Case Tab should be present on the eForm so that values will be populated in the hidden Case Tab using synchronization.
- This synchronization will be performed through (and limited by) eForms JavaScript™ APIs. If the Case tab is also exposed as visible, changes made to the eForm fields will only appear on the Case tab after the Case is closed and then re-opened. Just clicking the Save button will not update the display values on the Case tab unless the Case is closed and re-opened. This could cause confusion if the Case Tab is not hidden.

## Using an eForm Tab

### Editing an eForm

When a user opens a Case in the BPF Web Application and clicks on the eForms Tab, BPF will “Check out” the eForm (Form Data) Document object from Content Engine using the eForms API and display it to the user. It will be presented in editable mode if the eForms Tab is configured with mode=1 (via this querystring parameter in the URL specified for the eForms Tab in the TAB\_CONTENT column of the TABS table in the Bp8Metastore). Users will then be able to modify data on the eForm. In case of mode=2, BPF will display the eForm to the user as read-only.

### Saving an eForm

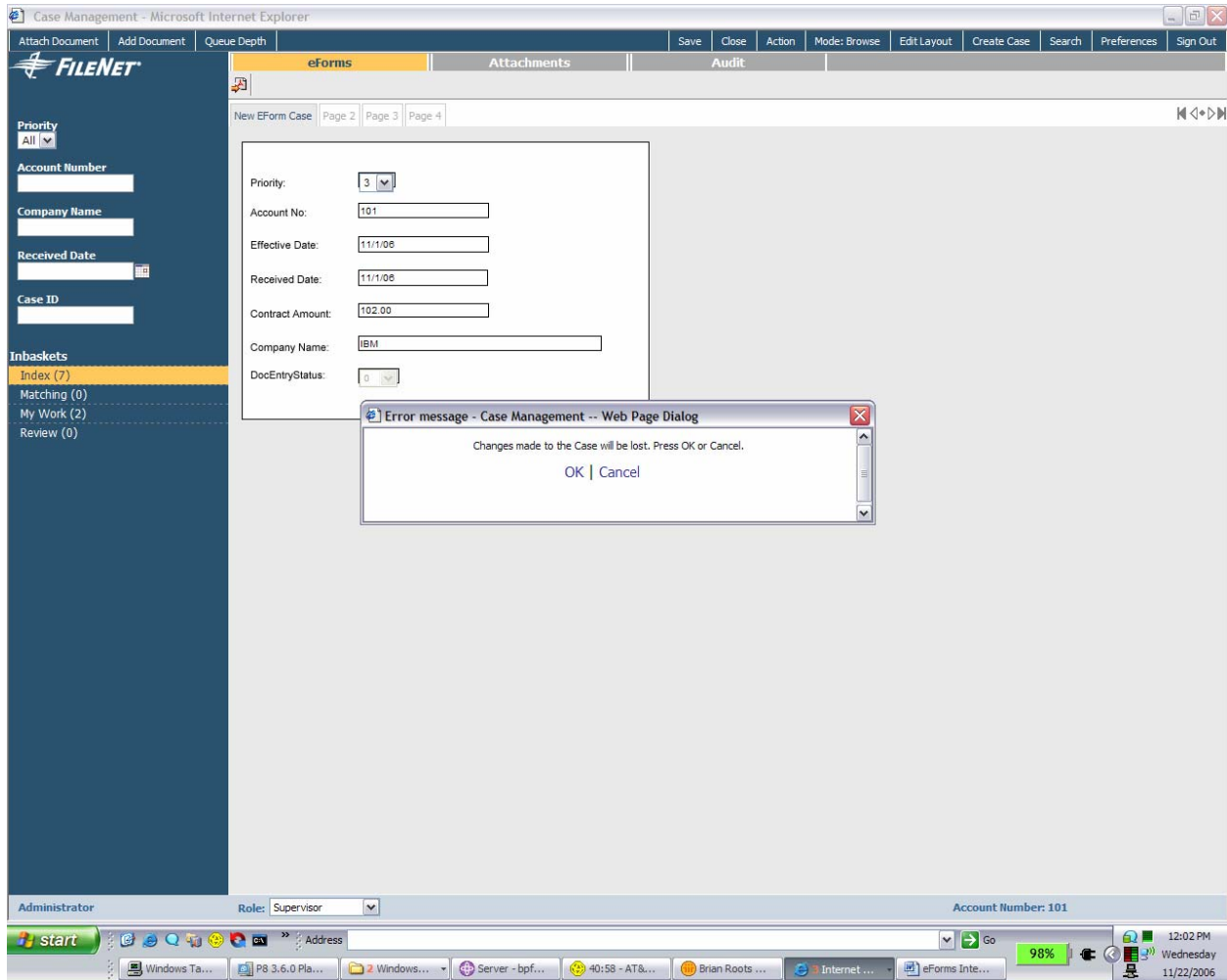
When a user clicks on the “Save” link, BPF will first “Check In” the eForm to the Content Engine and then immediately perform a “Check Out” on the new version. The exact sequence of events will be as follows.

- Synchronize BPF Case data with eForm form fields data based on identical field names
- Check In eForm in Content Engine
- Save BPF Case Object in Content Engine
- Check Out eForm again from Content Engine

**NOTE** Changing the value of an eForm field that is mapped to a choice list will have no effect unless the Tab key is used to move to next field. Once you select the correct choice, press Tab to accept the choice and move to the next field. If you press Tab without selecting a choice, the field is left blank and the cursor moves to the next field. This is a requirement of eForms itself.

### Closing an eForm

When a user clicks on the “Close” link, BPF will silently perform a Content Engine “Cancel Checkout” on the eForm as long as there is no changed, unsaved data on the eForm (called dirty data). If there is dirty data on the eForm, then BPF will show an alert message to the user with “OK” and “Cancel” option as shown below.



If the user clicks "OK", BPF will go ahead and close the current Case. If the user clicks "Cancel", BPF will return to existing screen without performing a close operation and the user will be allowed to click on the "Save" option before attempting to close the Case.

## Action

If the user chooses an Action from the "Action" menu, which closes a case, BPF will first Save the form, just as if the user clicked "Save" on the form, before performing any Action related operations and dispatching the PE work object associated with the case.

## BPF Search with eForms

BPF Searches are configured as CASEQUERY Inbaskets. BPF Inbaskets to be searched using eForms integration should be configured to expose the eForms Tab. If the eForms Tab is configured for mode =1 (editable) in the TAB\_CONTENT column of the TABS table in the Bp8Metastore, the first user will see the eForm in editable mode ("CheckOut" state) but if same Case is then searched and opened by another user while the first one still has it open, the other user will see the eForm in read-only mode with message saying "This eForm is 'checkout' by user <user-name>".

## eForm Case Creation Tool

### Overview of the eForm Case Creation Tool

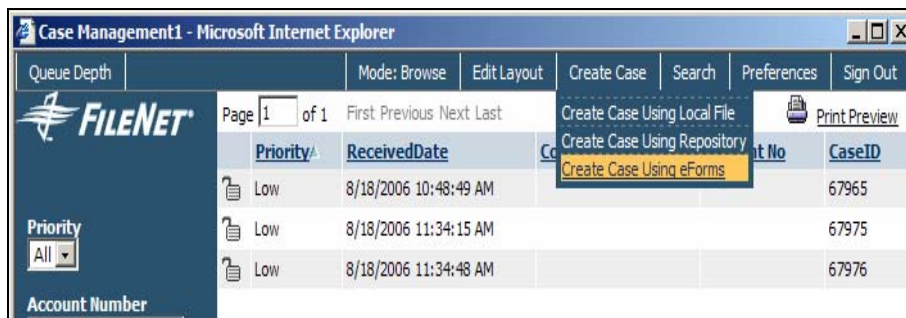
This section describes how to create a new BPF Case with an associated eForm using the eForm Case Creation Tool. This tool can be accessed in a variety of ways in the BPF Web Application user interface depending on how it is configured. Regardless of which method is used to access the eForm Case Creation Tool, the user will be able to create a new BPF Case and from an eForm.

Cases created with the use of this tool are created without any document attachments. An eForm is *associated* with a Case but is *not* actually *attached* to a Case in the manner of a traditional BPF attachment. Other attached content; documents and/or folders, can be added to this Case after Case Creation is complete.

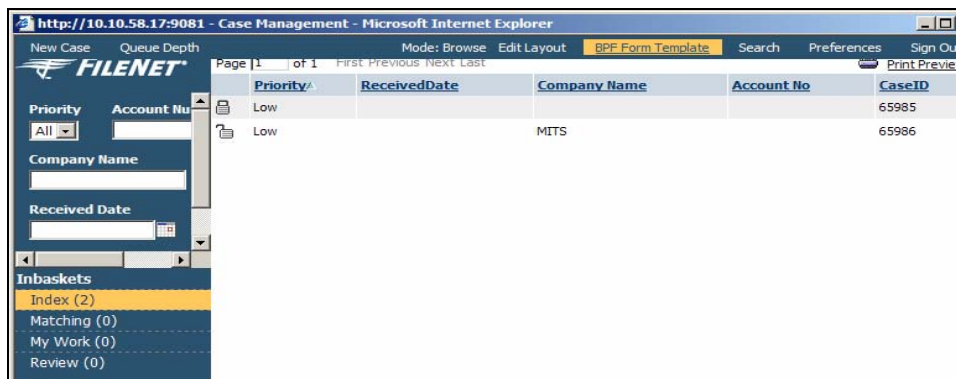
### Access Methods for the eForm Case Creation Tool

The eForm Case Creation Tool can be exposed in the BPF Web Application user interface to be accessed by the user in various ways based on design preferences. The choices are as follows:

1. As a **Dropdown Option** (Create Case Using eForms) among other Create Case tools in a Create Case dropdown menu in the upper right-hand section of the toolbar.



2. As an **Application Menu Item** (BPF Form Template) in the upper right-hand section of the toolbar.



3. As an **Inbasket Menu Item** (New eForms Case) configured through BPF Explorer and displayed in the upper left-hand section of the toolbar. The tool names shown in this document in parenthesis are simply the defaults and can be changed.



**NOTE** Choices 1 and 2 will be visible to all users at all times in the BPF Web Application user interface and are configured and customized via the Toolbar.xml file. Choice 3 is only visible when configured for individual Inbaskets and by tool visibility (Case mode, Browse mode, or both). It is configured using BPF Explorer.

## Using the eForm Case Creation Tool

Regardless of how the eForm Case Creation Tool is invoked, the eForm Case Creation Tool user interface will display a Form Template to be filled in by the user. All form data entry rules and functions will be available and enforced.

The user will complete form data entry and then click on the “Save” icon that appears in the window.

In the case of the sample eForms Case Management workflow that ships with the BPF installation media, this will create a “Case Management Form” class document instance in Content Engine. The Workflow Subscription associated with the “Case Management Form” class will then create a Case by launching a



new workflow that executes the BPF\_Operation CreateCase (configured through a Component Integrator step in the process map). Assuming the current Inbasket is configured to display the eForms Tab, the initiating eForm will then be visible in the custom eForms Tab. The following sections describe how to configure the system in order to achieve this result.

**NOTE** There will be a slight time lag between the moment when the user saves an eForm Form Data document from within the eForm Case Creation Tool and the moment the Case actually appears in the first Inbasket.

## Configuring the Access Method of the eForm Case Creation Tool

### Dropdown Option

This method utilizes the **toolbar.xml** file, located in the WEB-INF directory of the BPF Web Application, to configure the Form Template which will be invoked when the dropdown option is selected by the user.

By default, the hyperlink for this tool is commented out in the toolbar.xml file and must be un-commented and configured with the correct Form Template GUIDs in order to see the dropdown option and invoke the proper Form Template.

There are two GUID parameter values which are passed to invokeFormTemplate. They represent the object\_id and the version\_series\_id, respectively, of the Form Template (.itx) to be invoked.

These values must be edited with the correct values of the Form Template that you wish to invoke from the dropdown option. The **bold** text below shows the specific values that must be substituted with the Form Template GUID parameters.

```
<!--
EXTENSION TIP: Drop-down Create Case menu

A drop-down menu could be configured for selecting Create Case tools and Form Templates.
NOTE: See the top of this file for documentation on invokeFormTemplate() and
executeToolFromToolbar() helper function.
-->

<Item Caption='Create Case' Name='Case Templates' SearchMode='no'>
  <Description></Description>
  <Item Caption='Create Case Using Local File' Name='create_case' >
    <Description>New Case</Description>
    <Action>javascript:executeToolFromToolbar( "create_case","Bp8CreateCase.jsp", 400, 340,
1,1 )</Action>
  </Item>
  <Item Caption='Create Case Using Repository' Name='create_browse' >
    <Description>New with Browse</Description>
    <Action>javascript:executeToolFromToolbar( "create_browse","CreateCase.jsp", 380, 400,
1,1 )</Action>
  </Item>
  <!--<Item Caption='Create Case Using eForms' Name='create_eFormsCase' >
    <Description>Case Template</Description>
    <Action>javascript:invokeFormTemplate("{EEA94519-1382-4329-BC99-
E3BE5B984471}", "{6F434403-DFC8-4E7D-B9D5-4C9572AD80BD}")</Action>
  </Item>
-->
</Item>
```

## Application Menu Item

This method also utilizes the **toolbar.xml** file, located in the \WEB-INF directory of the BPF Web Application, to configure the Form Template which will be invoked when the menu item is selected by the user. Configuration of menu items is found in a different section of Toolbar.xml than previously described in the Dropdown Option.

By default, the hyperlink for this tool is commented out in the toolbar.xml file and must be un-commented and configured with the correct Form Template GUIDs in order to see the dropdown option and invoke the proper Form Template.

There are two GUID parameter values which are passed to invokeFormTemplate. They represent the object\_id and the version\_series\_id, respectively, of the Form Template (.itx) to be invoked.

These values must be edited with the correct values of the Form Template that you wish to invoke from the menu item. The **bold** text below shows the specific values that must be substituted with the Form Template GUID parameters.

```
<!--  
EXTENSION TIP: Invokes the Form Template stored in Content Engine  
-->  
<!--  
  <Item Caption='BPF Form Template' Name='Case Template' SearchMode='yes' >  
    <Description>Case Template</Description>  
    <Action>javascript:invokeFormTemplate("{70ACC01D-B7BE-42D7-BC12-  
2D798AA87BE5}", "{93F9D1C0-657E-4BEC-A286-C728B5F19BC9}")</Action>  
  </Item>  
-->
```

## Inbasket Menu Item

Lastly, if the design decision is made to expose the eForm Case Creation tool as a traditional BPF tool in the BPF Web Application UI and make it available for specific Inbaskets only, this is configured through BPF Explorer.

The Case Management sample application manifest (bpf\_cm.xml) which is typically imported into BPF Explorer as part of a new BPF installation already has the eForm Case Creation tool (create\_eFormsCase) configured as a BPF tool in BPF Explorer. See the BPF Explorer Tools definition below.

The screenshot shows the 'create\_eFormsCase Properties' dialog box. The 'General' tab is selected. The 'Case type' is set to 'Case Management'. The 'Tool name' is 'create\_eFormsCase'. The 'Display label' is 'New eForms Case'. The 'Handler URL' is 'ExtCommand.jsp?eForms&ExtTask=cr'. The 'Appearance' section has 'Window width' set to 463, 'Window height' set to 405, 'Resizable' checked, and 'Modal' checked. The 'Visibility' section has 'Case mode' unchecked and 'Browse mode' checked. A list of fields is shown on the left, and a table on the right with columns: Display Label, Case Field, Value, Required, Visible.

To modify or manually create a new eForm Case Creation tool in BPF Explorer, refer to the Tools section in the *IBM FileNet Business Process Framework Explorer Handbook* for information on the field definition descriptions.

The handlerURL entry for this tool has the following syntax, and any changes or customizations to the handlerURL for this tool must adhere to the following specification:

```
ExtCommand.jsp?eForms&ExtTask=create_eform_case&id={46A4F3A1-41C2-46B9-AE71-4393D906B335}&vsId={6F434403-DFC8-4E7D-B9D5-4C9572AD80BD}&objectType=document
```

There are 5 parameters in the URL passed by this tool to the **ExtCommand.jsp** page:

Parameter name	Case sensitivity	Description	Remarks
eForms	Case sensitive	This value is used to differentiate the "create_eFormsCase" tool from other tools.	Do not change this value.
ExtTask=create_eform_case	Case sensitive	Identifies the external task.	Do not change this value.
id	Always use upper case alpha characters for alpha hex digits.	object_id of the ITX form Template document object.	Change this value to match the object_id of the ITX form Template document object you

			want to use.
vsld	Always use upper case alpha characters for alpha hex digits.	version_series_id of the version of the ITX Form Template to be invoked.	Change this value to match the version_series_id of the version of the ITX form Template document object you want to use.
objectType=document	Case sensitive	Identifies the object type of the ITX Form Template to be invoked.	Do not change this value.

## Configuring the eForm Case Creation Tool

The remainder of this section on the eForm Case Creation Tool is dedicated to a step-by-step description of how to configure and deploy the tool itself, using the Case Management sample application (as modified and updated for eForms integration) as an example. The following steps will be the same regardless of which of the three access methods is used to expose this tool once it is configured.

### Configuration files for eForms

In order for eForms to be accessed within BPF, the following two configuration files need to be copied to the BPF configuration directory:

- eforms-integration.xml
- eforms-functions.xml

The source configuration files are delivered on the BPF installation media in the following folder:

- CDRoot\misc\solutions\case\_management\config folder

Copy the files into the configuration directory.

- To determine the location of the configuration directory, look for the value of the parameter "**configurationDirectory**" inside <bpf-app>/WEB-INF/web.xml file. The default value for the configuration directory is C:\Program Files\FileNet\Config\BPF.

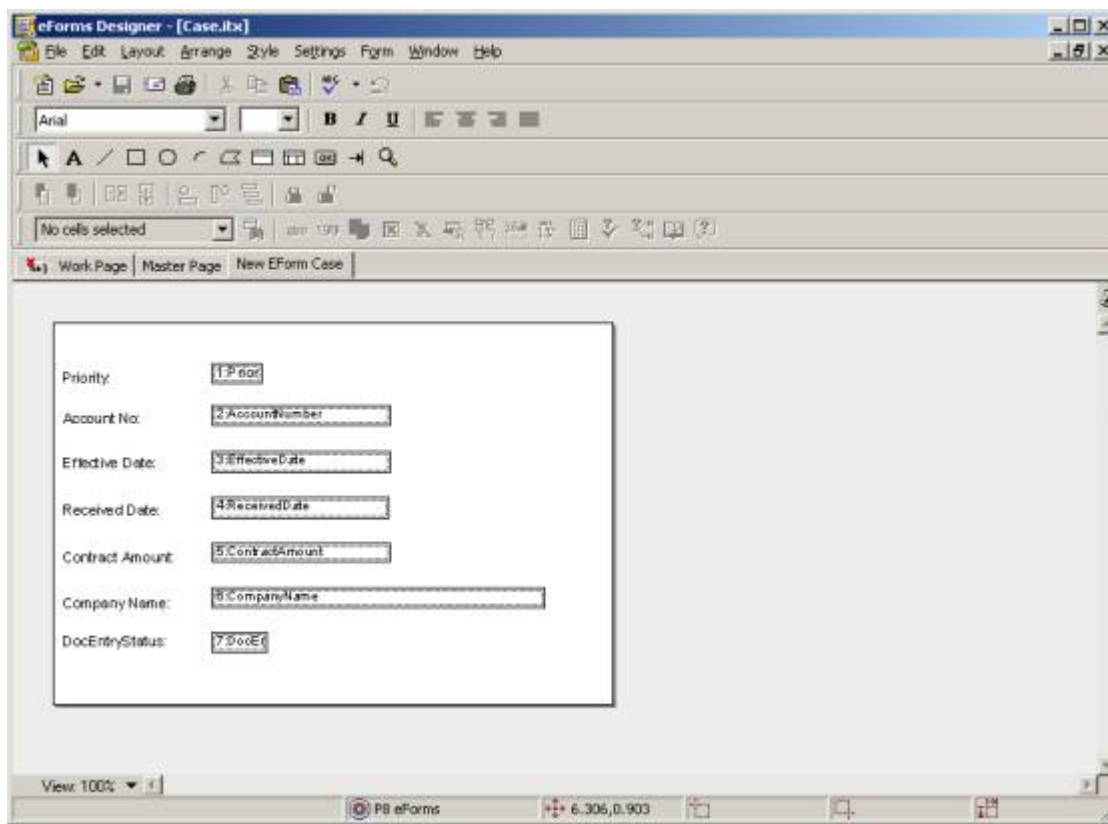
### Add the Form Template to P8 Workplace

The first step in deploying a custom solution would be to create a new Form Template using the FileNet eForms Designer application, saving the result as an .itx file. In designing the template, it would be important to name those form fields that will integrate with BPF Case fields in such a way that the form field names match the names of the corresponding BPF Case fields *exactly*, so that the BPF eForms integration code will recognize the need to synchronize their values and synchronize the data accordingly. If you design a form field in a Form Template as required, this will be enforced when using the eForm Case Creation Tool.

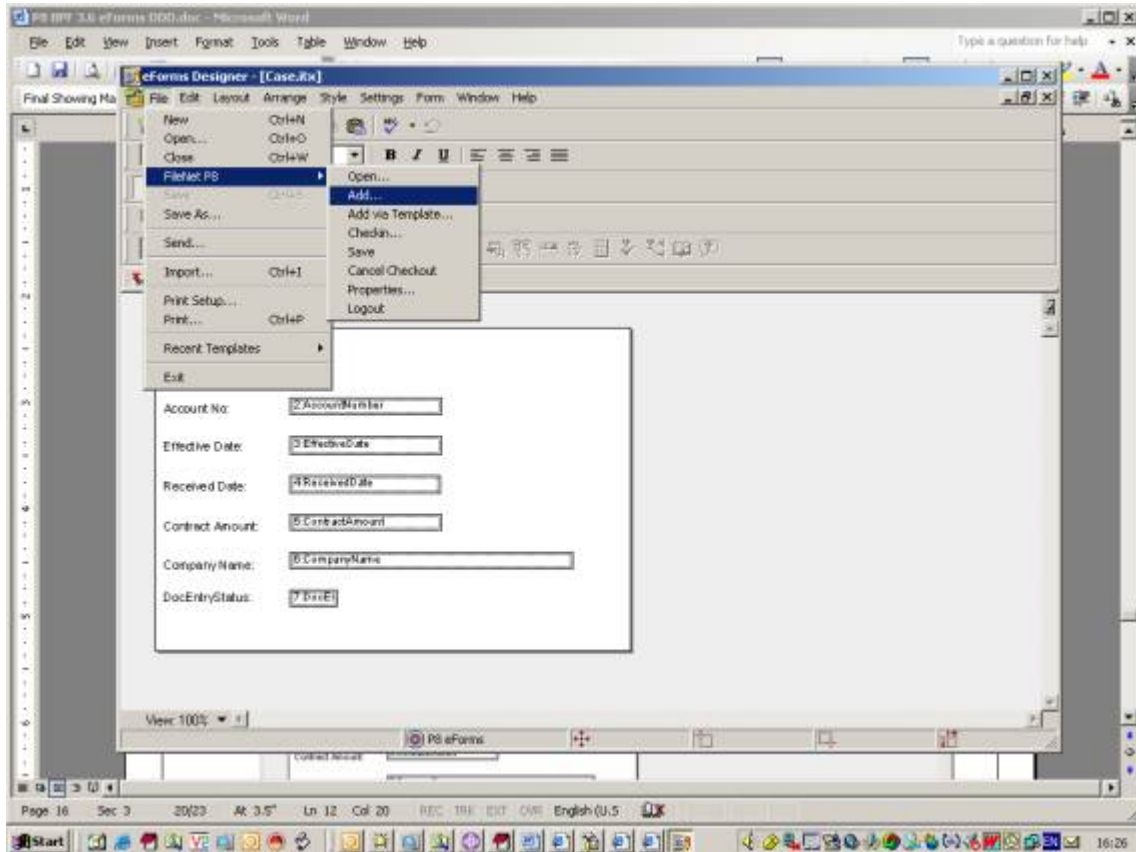
In the Case Management sample application, this has already been done for you. The **Case.itx** Form Template is provided in the "CDRoot\misc\solutions\case\_management\config" folder installed within the file structure of the BPF Web Application by the BPF installation media.

Next, add the **Case.itx** Form Template using Workplace (via eForms Designer) by executing the following steps.

1. Open your Form Template using eForm Designer.

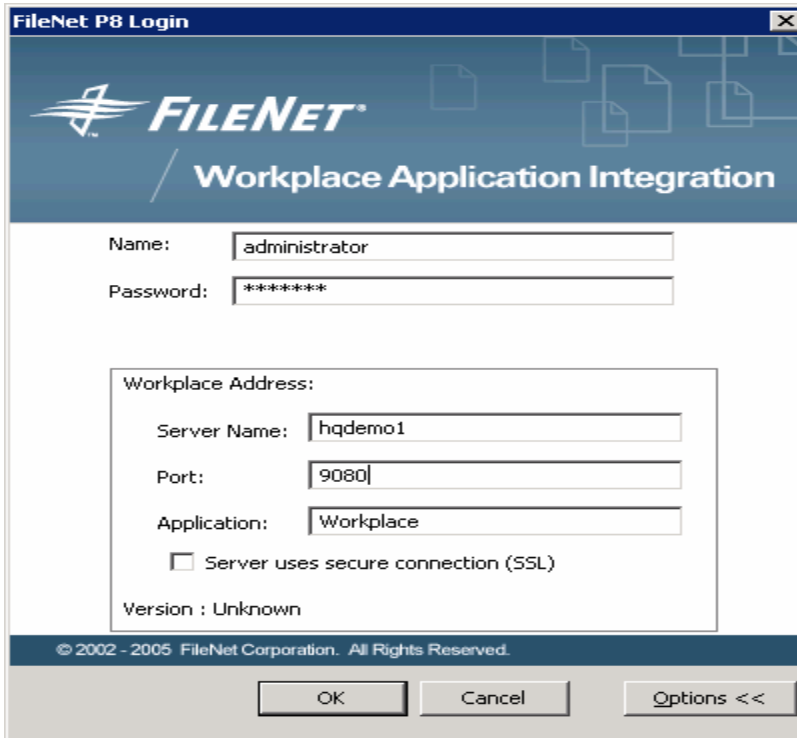


2. Add the Template to Workplace using File > FileNet P8 > Add menu.



This will bring up the Workplace login page. If you are checking in the eForms Template for the first time, you will see the screenshot below, for subsequent logins, you will see the second version of the login screen shown.

3. Enter the required login credentials.



The screenshot shows the 'FileNet P8 Login' dialog box. It features the FileNet logo and the text 'Workplace Application Integration'. The 'Name' field contains 'administrator' and the 'Password' field contains '\*\*\*\*\*'. Below these is a 'Workplace Address' section with 'Server Name' as 'hqdemo1', 'Port' as '9080', and 'Application' as 'Workplace'. There is an unchecked checkbox for 'Server uses secure connection (SSL)' and the text 'Version : Unknown'. At the bottom, there is a copyright notice '© 2002 - 2005 FileNet Corporation. All Rights Reserved.' and three buttons: 'OK', 'Cancel', and 'Options <<'.

FileNet P8 Login

**FILENET**  
Workplace Application Integration

Name: administrator

Password: \*\*\*\*\*

Workplace Address:

Server Name: hqdemo1

Port: 9080

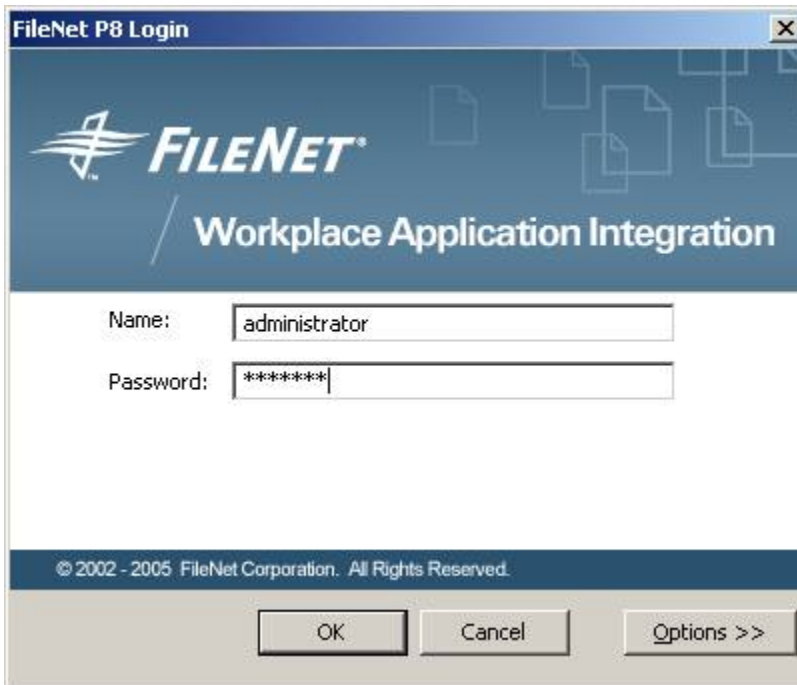
Application: Workplace

☐ Server uses secure connection (SSL)

Version : Unknown

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OK Cancel Options <<



This screenshot is identical to the one above, but the 'Options' button at the bottom right is labeled 'Options >>' instead of 'Options <<'.

FileNet P8 Login

**FILENET**  
Workplace Application Integration

Name: administrator

Password: \*\*\*\*\*

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OK Cancel Options >>

4. Select the Object Store and Folder in which you wish to store this template.

The screenshot shows the 'FileNet P8 Add - Case.itx' dialog box. The title bar includes 'Administrator | Tuesday, April 3, 2007' and 'Help | Close'. The 'Add Document' tab is active. Under 'Steps', '1. Select Folder' is highlighted. The 'Path' is 'Object Stores > Bp8ObjectStore > BPF > eforms > Form Template'. Below the path are icons for 'Get Info', 'Show Contents', and 'Add Folder'. A 'Summary' section shows: Object Store: Bp8ObjectStore, Folder: Form Template, Document Class: ITX Form Template, and Filename: Case.itx. 'Next' and 'Cancel' buttons are on the right.

5. Enter the Document Title. This title will appear on the title bar of the IE window when the eForm Case Creation Tool is invoked in BPF. You must add the Form Template as a major version.

The screenshot shows the 'FileNet P8 Add - Case.itx' dialog box at 'Step 2: Set Properties'. The 'Class' is 'ITX Form Template' with a 'Change Class' link. A table lists properties: 'Document Title' (New eForm Case - Case Management) and 'Form Description' (empty). An 'Options' section has 'Add as major version' set to 'Yes'. The 'Summary' section at the bottom shows the same path and filename as Step 1. 'Previous', 'Next', 'Finish', and 'Cancel' buttons are on the right.

Property	Value
Document Title:	New eForm Case - Case Management
Form Description:	

Options

Add as major version: Yes



6. Apply the desired security settings for the template.

FileNet P8 Add - Case.itx

Administrator | Tuesday, April 3, 2007 Help | Close

**Add Document**

**Steps**

- 1. Select Folder
- 2. Set Properties
- 3. Set Security

Security Policy: [none assigned]

Assign Policy

Title	Owner Control	Promote Version	Modify Content	Modify Props	View Content	View Props	Publish	Remove
#AUTHENTICATED-USERS					✓	✓		<input type="checkbox"/>
Administrator	✓	✓	✓	✓	✓	✓	✓	<input type="checkbox"/>

**Add New**

Summary:

Object Store: *Bp8ObjectStore*

Folder: *Form Template*

Document Class: *ITX Form Template*

Filename: *Case.itx*

Previous Finish

Cancel

7. Click Finish. You should see the following two screens when the Form Template has been added successfully as an ITX Form Template document object in Workplace.

FileNet P8 Add - Case.itx

Administrator | Tuesday, April 3, 2007 Help | Close

**Add Confirmation**

Add succeeded for: **New eForm Case - Case Management**

Summary:

Object Store: *Bp8ObjectStore*

Parent Folder: *Form Template*

Document Class: *ITX Form Template*

Filename: *Case.itx*

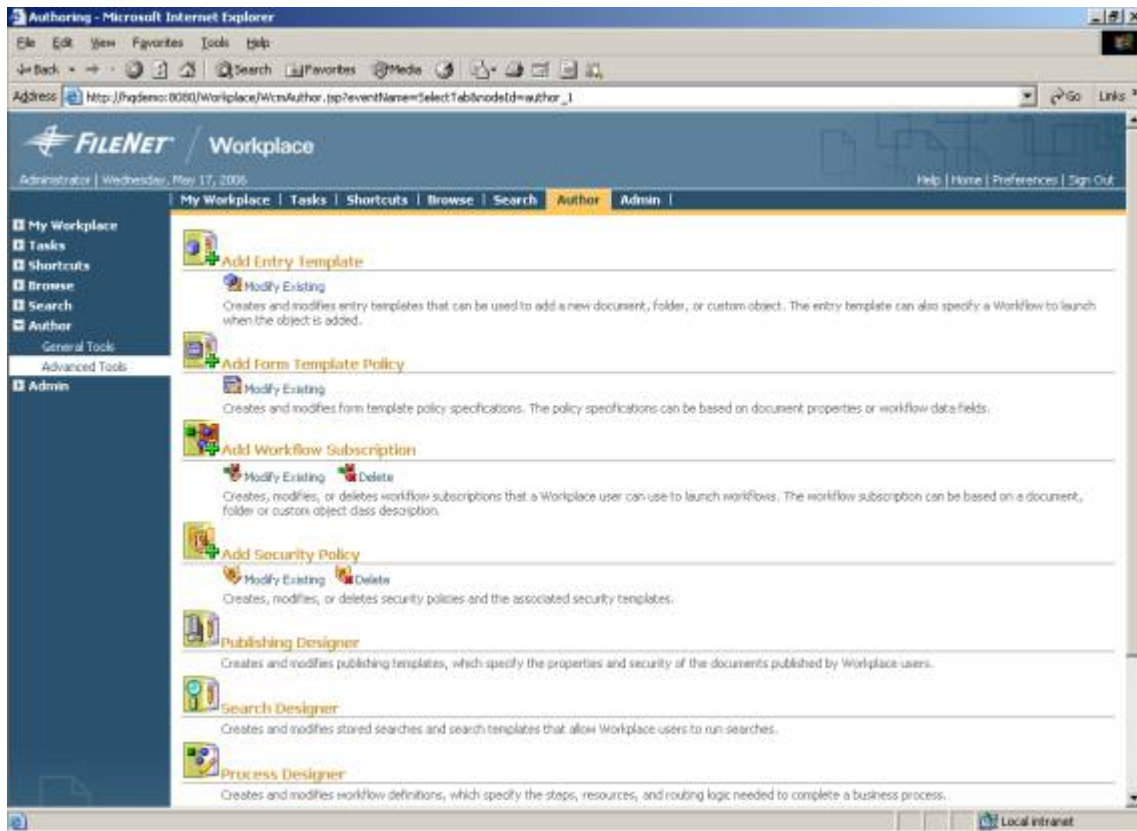
OK

Copyright © 2002, 2006 FileNet Corporation. All rights reserved.

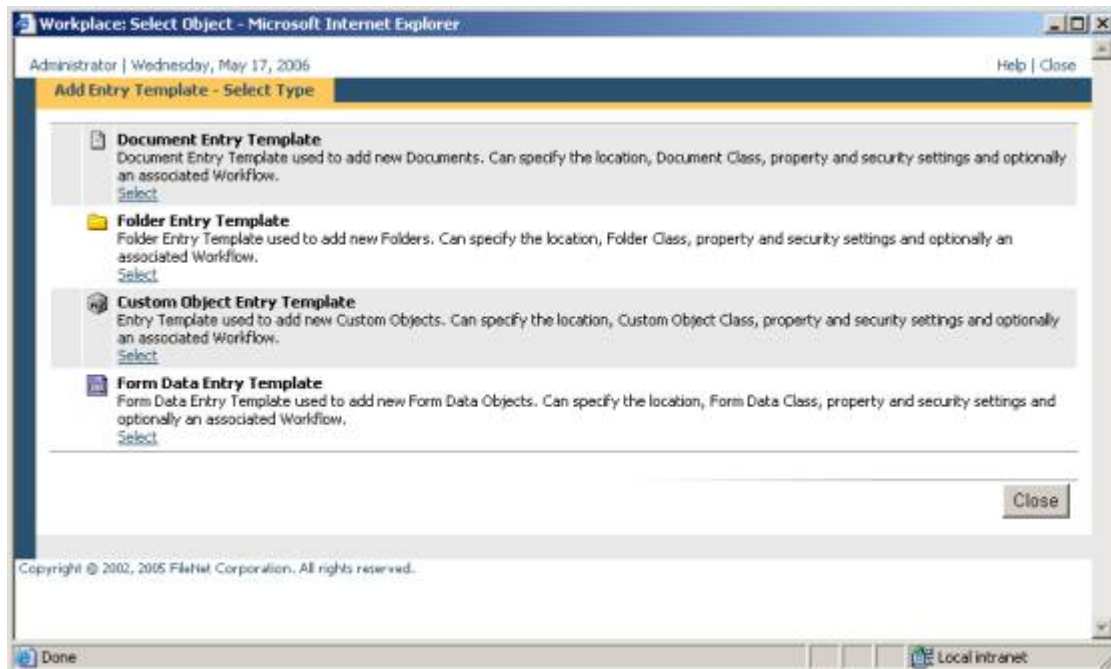
## Add Entry Template

Now that you have added your ITX Form Template document to Workplace, the next step is to add an Entry Template for it.

8. Go to Workplace > Author > Advanced Tools and select "Add Entry Template".



9. Select "Form Data Entry Template".



- Specify the CE Folder location where you plan to store Form Data documents (i.e. individual instances of the completed eForm class - one for each BPF Case - for which you are here configuring an Entry Template). Then check the “Hide Select Folder step” radio option so that end users will not be able to change the Folder location you have configured here.

http://hqdemo1:9081 - Workplace: Entry Template Designer - Microsoft Internet Explorer

Administrator | Tuesday, April 3, 2007

Help | Close

**Add Entry Template**

**Define Template**

- 1. **Select Folder**
- 2. Set Properties
- 3. Set Security

**Define Workflow**

- 4. Select Workflow
- 5. Set Properties

**Save Template**

- 6. Select Folder
- 7. Set Properties
- 8. Set Security

Path: **Object Stores > Bp8ObjectStore > BPF > eforms > Form Data**

Get Info Show Contents Add Folder

Select Folder step display setting:

☐ Show Select Folder step ☒ Hide Select Folder step

☐ Constrain to folder selected or its sub-folders.

Summary:

Object Store: *Bp8ObjectStore*

Folder: *Form Data*

Document Class: *(Not Selected)*

Entry Type: *Form Data*

Next

Cancel

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Done Internet

- Click the “Change Class” link in the “Set Properties” step.

http://hqdemo1:9081 - Workplace: Entry Template Designer - Microsoft Internet Explorer

Administrator | Tuesday, April 3, 2007

Help | Close

**Add Entry Template**

**Define Template**

- 1. Select Folder
- 2. **Set Properties**
- 3. Set Security

**Define Workflow**

- 4. Select Workflow
- 5. Set Properties

**Save Template**

- 6. Select Folder
- 7. Set Properties
- 8. Set Security

Class: **Form Data** [Change Class](#) [Order Class properties](#)

Required	Property	Default Value	Access Level
<input type="checkbox"/>	Document Title		Editable

**Options**

Add as major version: No Editable

Entry template setting:

☒ Show Set Properties step ☐ Hide Set Properties step

Summary:

Object Store: *Bp8ObjectStore*

Folder: *Form Data*

Document Class: *Form Data*

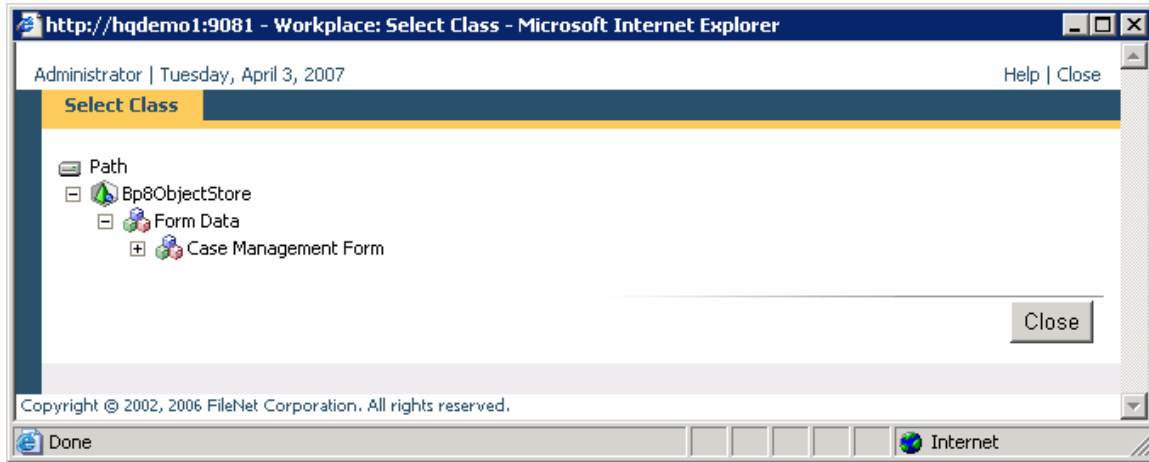
Entry Type: *Form Data*

Previous Next

Cancel

http://hqdemo1:9081/Workplace/# Internet

- Click "Case Management Form" class, if you are deploying the Case Management sample application code. Otherwise, choose the "Form Data" document subclass (creating one, if necessary) that you want to use for your own custom solution.



13. For the Case Management sample application, set the default value for DocEntryStatus=DocEntry (used in the Filter Expression of the Content Engine Workflow Subscription that will launch the eFormsCaseManagement Workflow to create a new BPF Case) and CasePriority=Low (consistent with existing create\_case tool).

Select the “Hide” option under Access Level for “DocEntryStatus” field so that end users cannot change it. Then select the radio button for “Hide Set Properties step” so that end users cannot change the properties either.

Set the value for “Add as major version”=Yes.

http://hqdemo1:9081 - Workplace: Entry Template Designer - Microsoft Internet Explorer  
 Administrator | Tuesday, April 3, 2007 Help | Close

**Add Entry Template**

**Define Template**

- 1. Select Folder
- 2. Set Properties**
- 3. Set Security

**Define Workflow**

- 4. Select Workflow
- 5. Set Properties

**Save Template**

- 6. Select Folder
- 7. Set Properties
- 8. Set Security

**Class: Case Management Form** [Change Class](#) [Order Class properties](#)

Required	Property	Default Value	Access Level
<input type="checkbox"/>	Document Title		Editable
<input type="checkbox"/>	Account Number		Editable
<input type="checkbox"/>	Bp8CaseID		Editable
<input type="checkbox"/>	Company Name		Editable
<input type="checkbox"/>	Contract Amount		Editable
<input type="checkbox"/>	DocEntryStatus	DocEntry	Hide
<input type="checkbox"/>	CasePriority	Low	Editable
<input type="checkbox"/>	Effective Date	<input type="text"/> <a href="#">Clear (MM/d/yy)</a>	Editable
<input type="checkbox"/>	ReceivedDate	<input type="text"/> <a href="#">Clear (MM/d/yy)</a>	Editable

**Options**

Add as major version: **Yes** Editable

Entry template setting::

☐ Show Set Properties step ☒ Hide Set Properties step

Summary:

Object Store: *Bp8ObjectStore*  
 Folder: *Form Data*  
 Document Class: *Case Management Form*  
 Entry Type: *Form Data*

Previous Next Cancel

Done Internet

14. Select the appropriate security settings and then select the "Hide Set Security step" radio button, so that end users cannot change the security settings.

http://10.10.58.17:9081 - Workplace: Entry Template Designer - Microsoft Internet Explorer

Administrator | Wednesday, April 4, 2007

**Add Entry Template**

**Define Template**

- 1. Select Folder
- 2. Set Properties
- 3. Set Security

Security Policy: [none assigned]

Assign Policy

	Title	Owner Control	Promote Version	Modify Content	Modify Props	View Content	View Props	Publish	Remove
	#AUTHENTICATED-USERS					✓	✓		<input type="checkbox"/>
	#CREATOR-OWNER	✓	✓	✓	✓	✓	✓	✓	<input type="checkbox"/>
	Administrator	✓	✓	✓	✓	✓	✓	✓	<input type="checkbox"/>

**Add New**

Select Security step display setting:

☐ Show Set Security step ☒ Hide Set Security step

Summary:

Object Store: *Bp8ObjectStore*

Folder: *Form Data*

Document Class: *Case Management Form*

**Previous** **Next** **Cancel**

Done Internet

15. Skip the "Define Workflow" section ("4. Select Workflow" and "5. Set Properties").

16. At "6. Select Folder", specify the CE Folder where this Entry Template will be saved.

http://hqdemo1:9081 - Workplace: Entry Template Designer - Microsoft Internet Explorer

Administrator | Tuesday, April 3, 2007

**Add Entry Template**

**Define Template**

- 1. Select Folder
- 2. Set Properties
- 3. Set Security

Path: **Object Stores > Bp8ObjectStore > BPF > eforms > Form Entry Template**

Get Info Show Contents Add Folder

**Define Workflow**

- 4. Select Workflow
- 5. Set Properties

**Save Template**

- 6. Select Folder
- 7. Set Properties
- 8. Set Security

Summary:

Object Store: *Bp8ObjectStore*

Document Class: *Entry Template*

Entry Type: *Form Data*

**Previous** **Next** **Cancel**

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Done Internet

17. At "7. Set Properties", Enter an appropriate "Document Title" value for your Entry Template, such as "CreateCaseEntryTemplate" for the Case Management sample application.

The screenshot shows a web browser window titled "http://hqdemo1:9081 - Workplace: Entry Template Designer - Microsoft Internet Explorer". The address bar also shows "Administrator | Tuesday, April 3, 2007" and "Help | Close". The main content area is titled "Add Entry Template" and features a sidebar with a navigation menu. The menu includes sections for "Define Template", "Define Workflow", and "Save Template", each with numbered steps. Step 7, "Set Properties", is currently selected and highlighted. The main area displays a form for the "Class: Entry Template". It contains a table with two columns: "Property" and "Value". The first row has "Document Title:" in the "Property" column and a text input field containing "CreateCaseEntryTemplate" in the "Value" column. The second row has "Description:" in the "Property" column and a text area in the "Value" column. Below the table, there is a "Summary:" section with the following text: "Object Store: BpObjectStore", "Document Class: Entry Template", and "Entry Type: Form Data". To the right of the summary are three buttons: "Previous", "Next", and "Cancel". The footer of the browser window shows "Copyright © 2002, 2006 FileNet Corporation. All rights reserved." and a status bar with "Done" and "Internet" icons.

http://hqdemo1:9081 - Workplace: Entry Template Designer - Microsoft Internet Explorer  
Administrator | Tuesday, April 3, 2007 Help | Close

**Add Entry Template**

**Define Template**

- 1. Select Folder
- 2. Set Properties
- 3. Set Security

**Define Workflow**

- 4. Select Workflow
- 5. Set Properties

**Save Template**

- 6. Select Folder
- 7. Set Properties**
- 8. Set Security

**Class: Entry Template**

Property	Value
Document Title:	CreateCaseEntryTemplate
Description:	

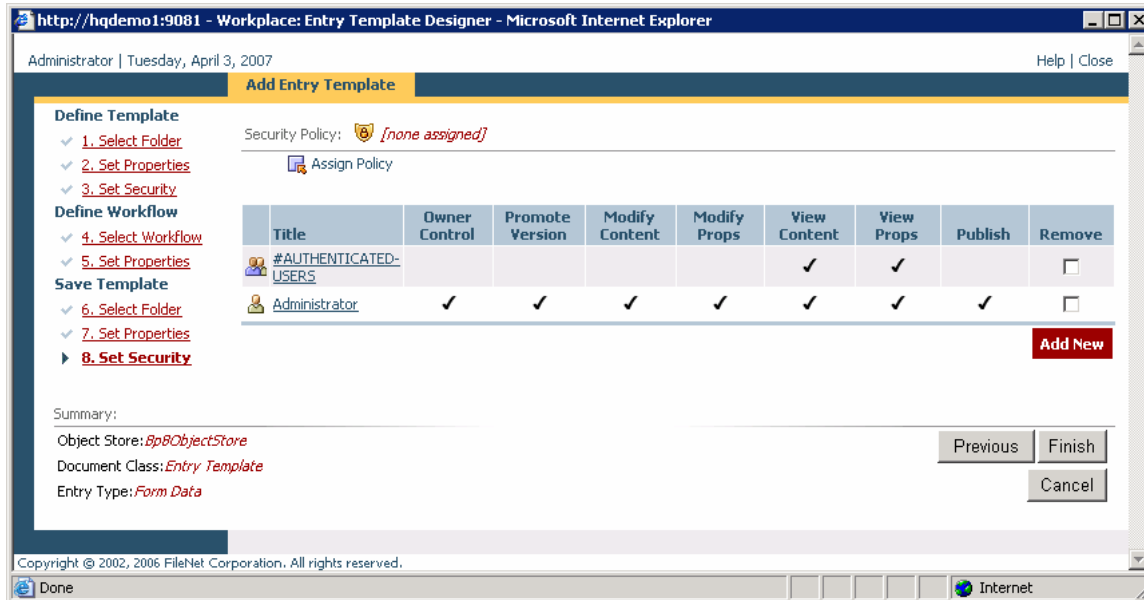
Summary:

Object Store: BpObjectStore  
Document Class: Entry Template  
Entry Type: Form Data

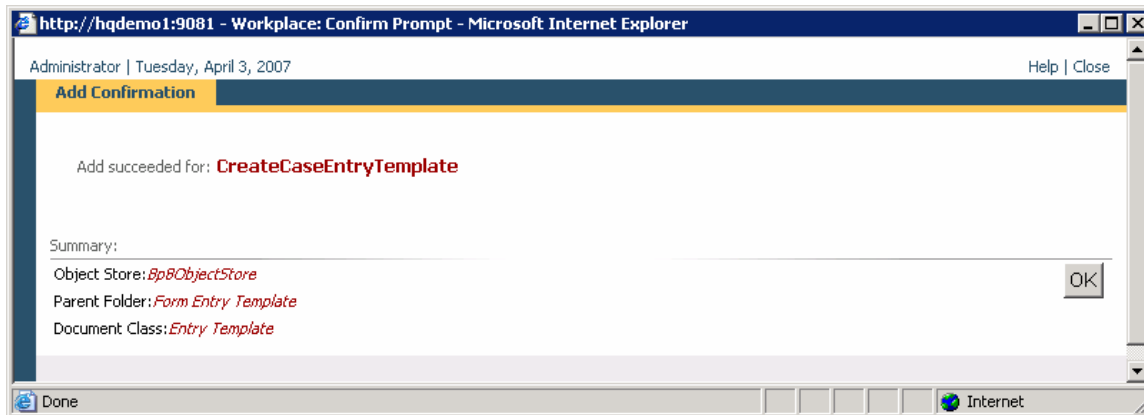
Previous Next  
Cancel

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Done Internet

18. At "8. Set Security ", apply the appropriate security settings and click Finish.



19. Click "OK" on the "Add Confirmation" screen.

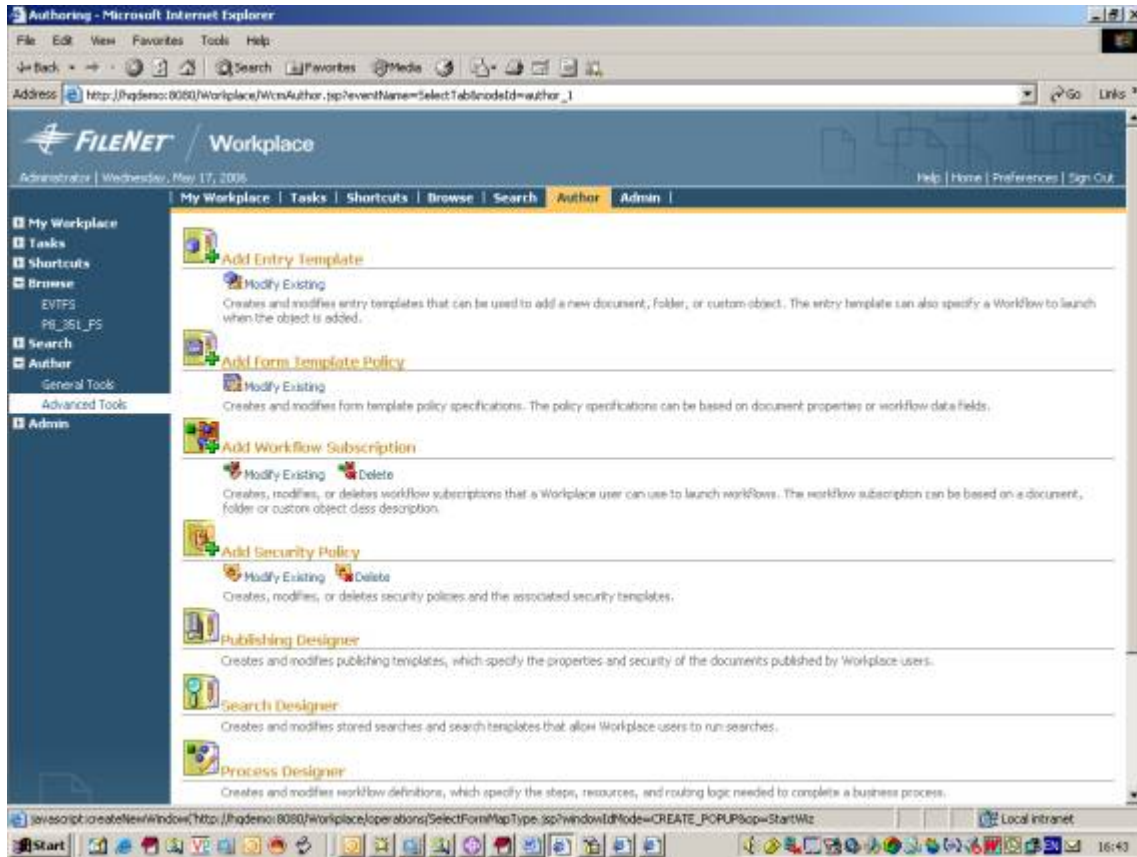




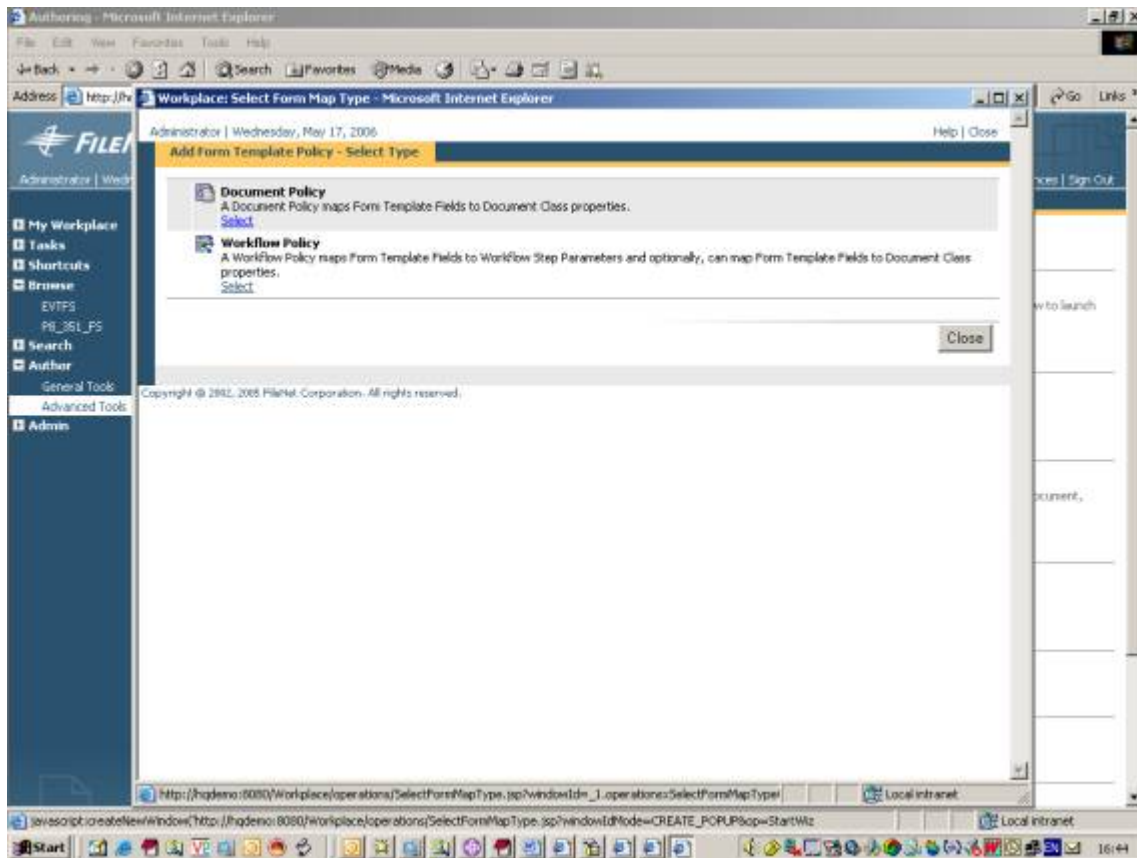
## Add a Form Policy

Now that you have added your Form Template and created your Form Entry Template, you are ready to add a Form Policy to your Form Entry Template using Workplace > Advanced tools > Add Form Policy as follows.

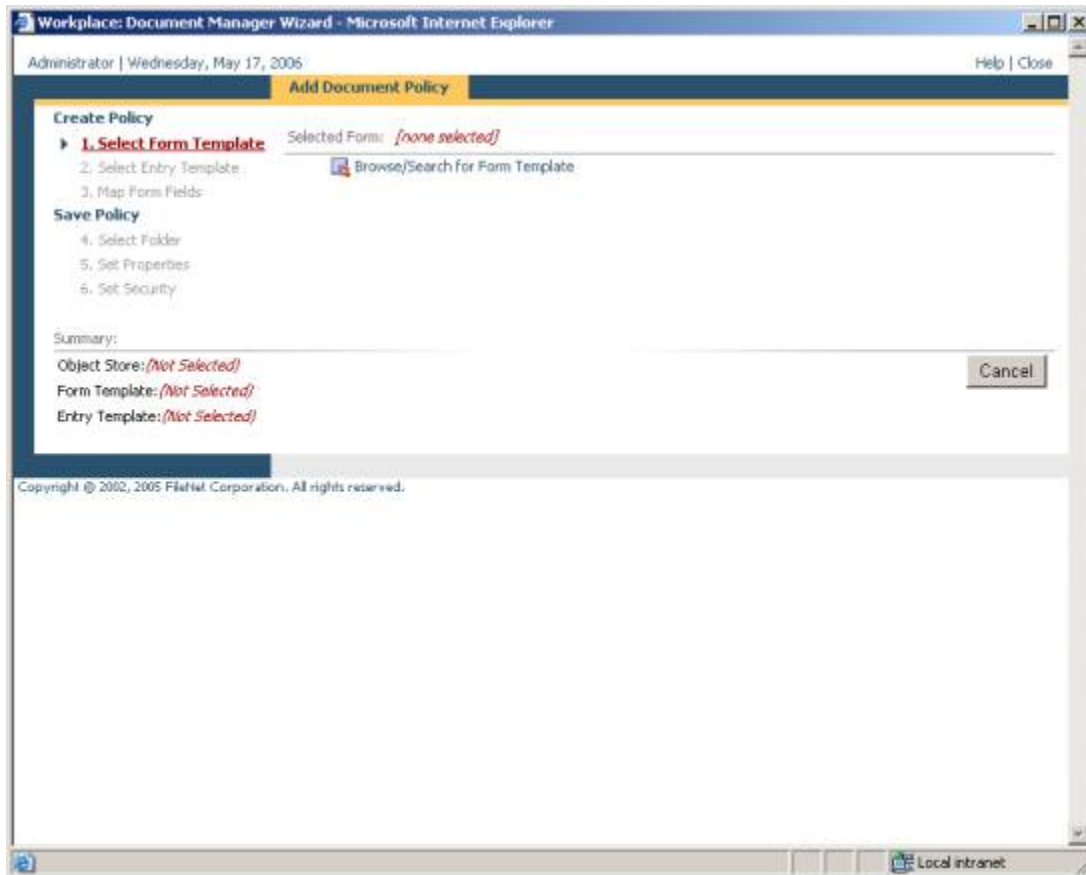
20. Go to Workplace > Author > Advanced Tools and select "Add Form Policy".



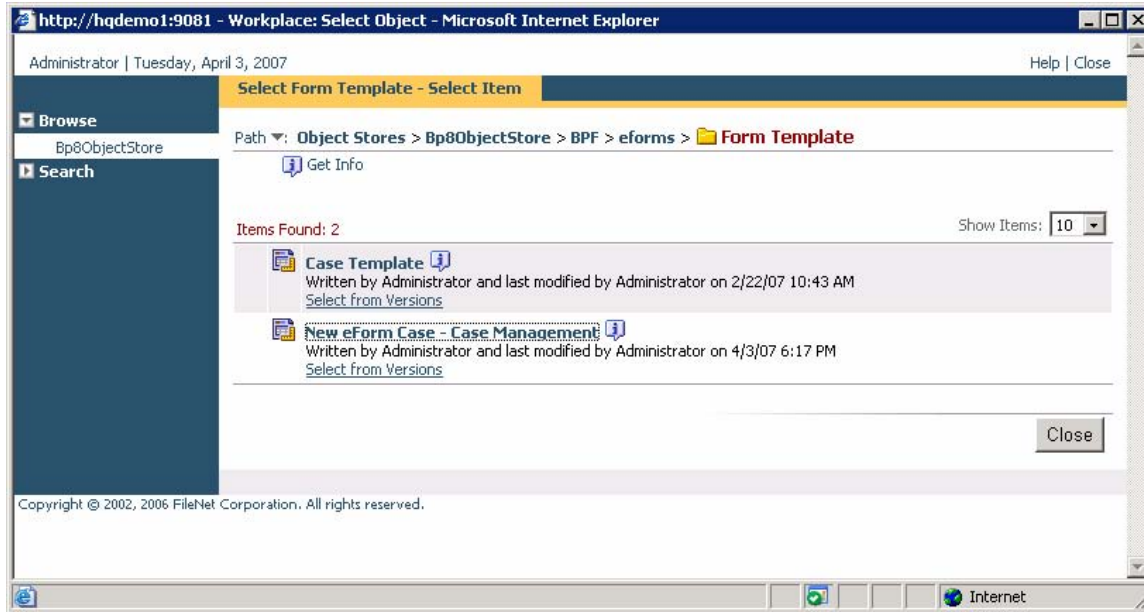
21. Select "Document Policy".



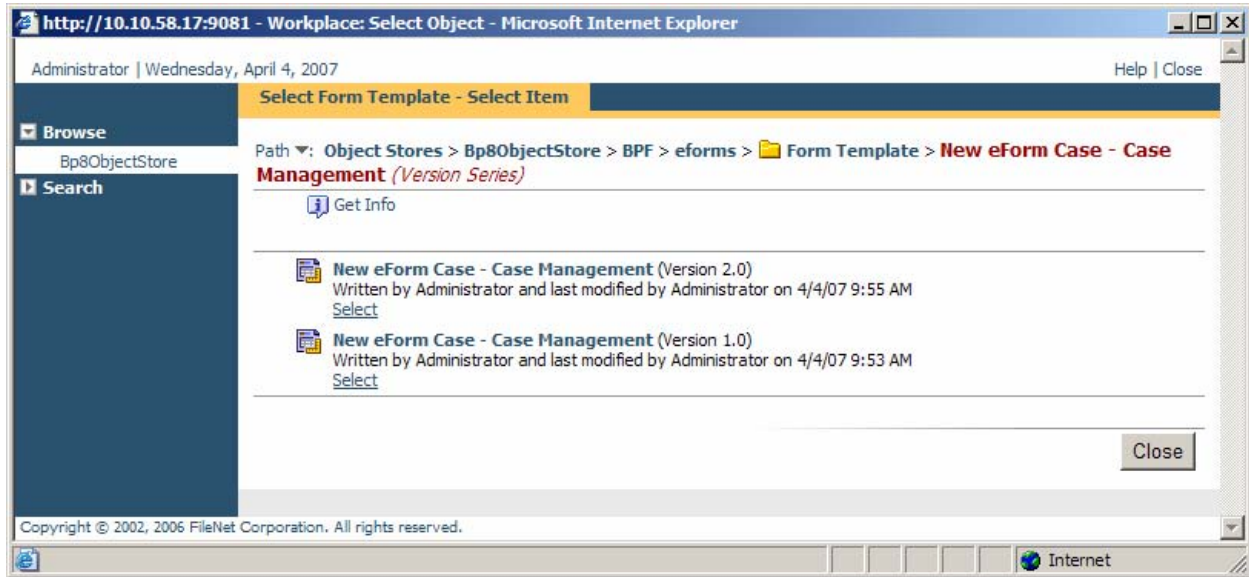
22. At "1. Select Form Template", Select the Form Template you added earlier.



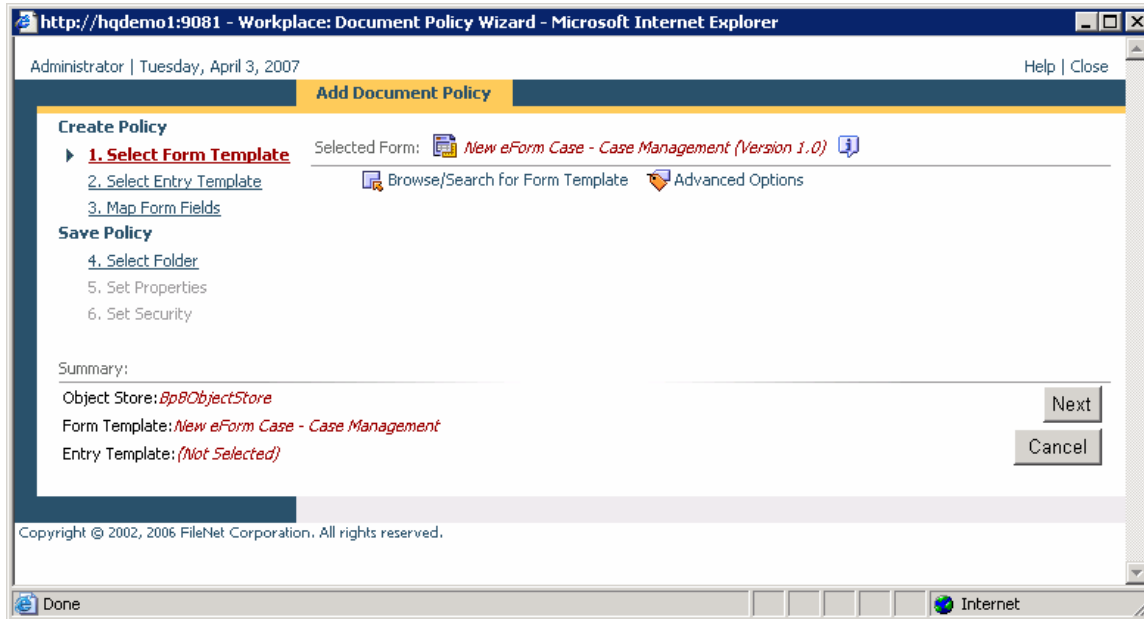
23. Once you have selected your Form Template, choose the correct version of it by first clicking on the "Select from Versions" link...



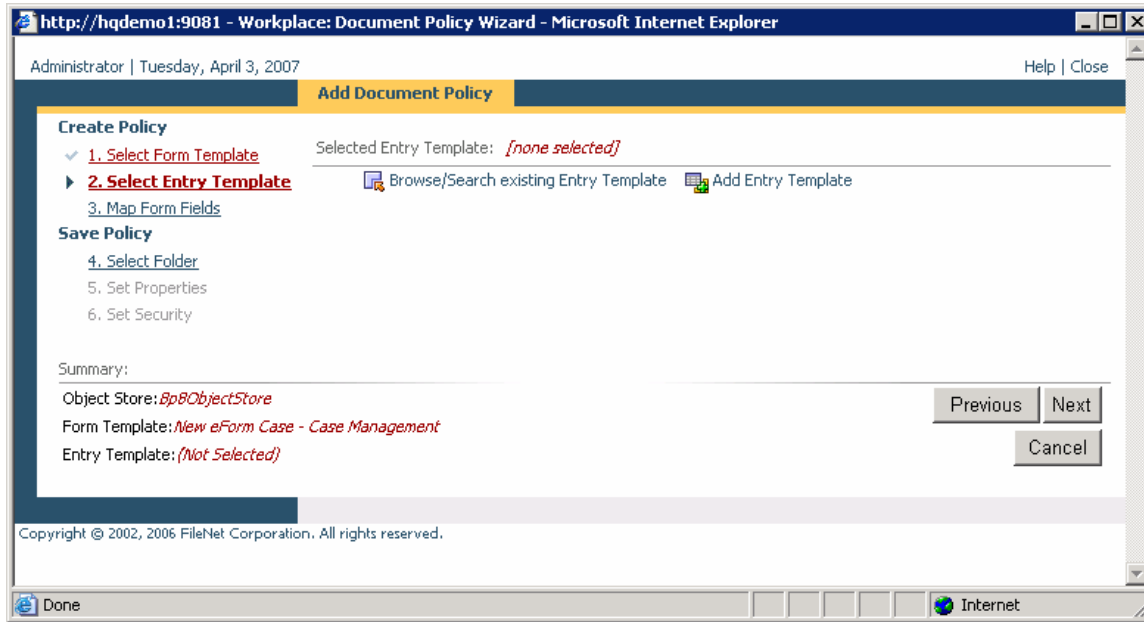
24. Clicking on the “Select” link that appears under the version you want to use.



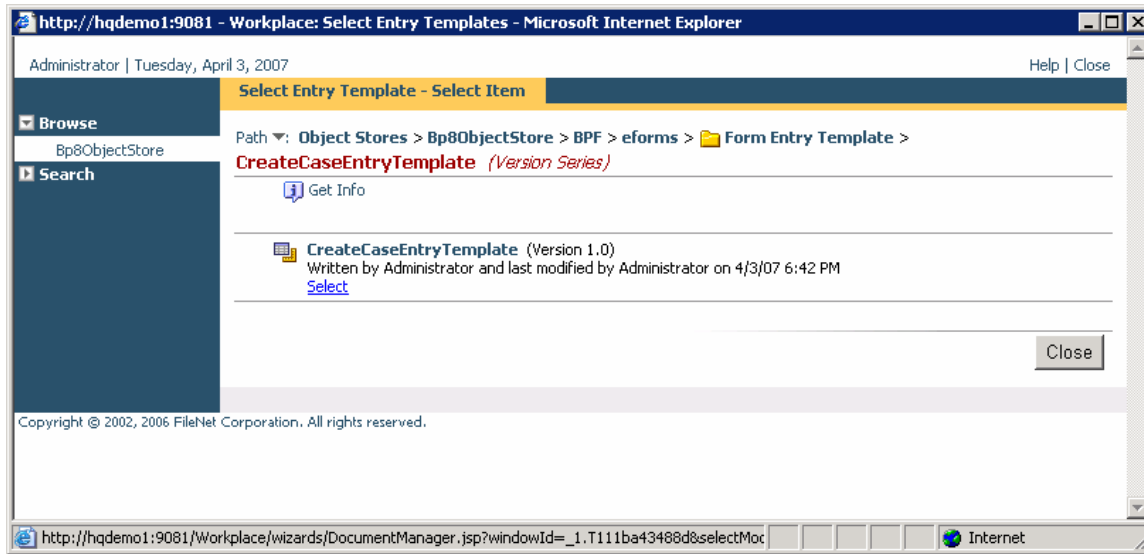
25. Click the "Next" button to complete "1. Select Form Template".



26. At "2. Select Entry Template", select the Form Entry Template (for example, "CreateCaseEntryTemplate" in the case of the Case Management sample application) you created earlier.

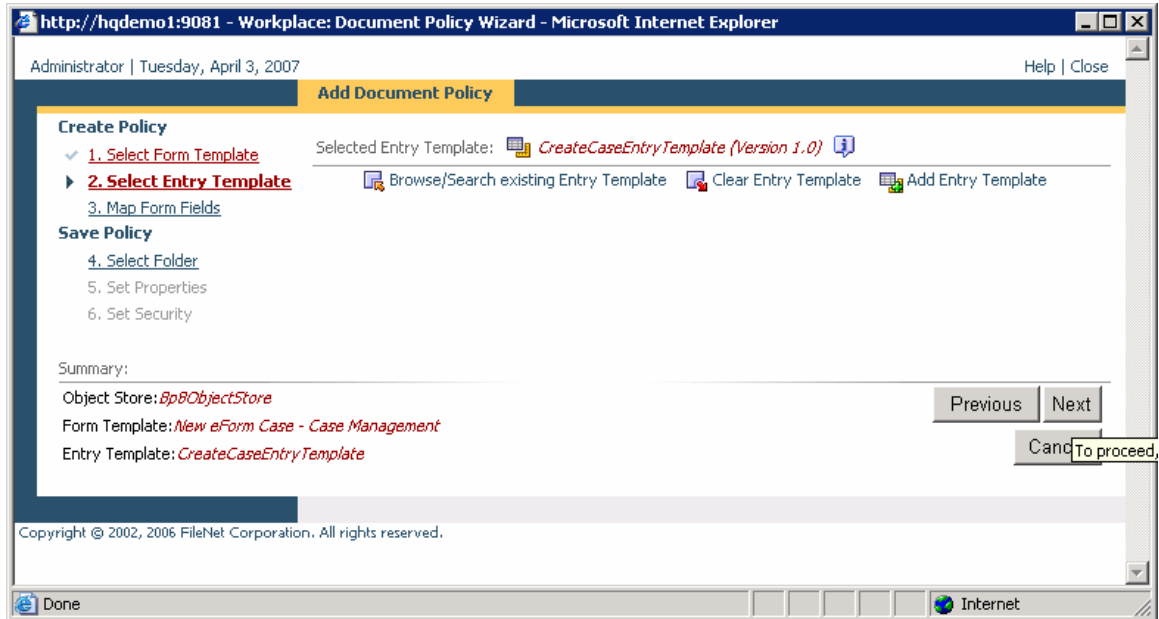


27. Click the “Select” link appearing under the version of your Form Entry Template that you would like to use.





28. Click “Next” to complete “2. Select Entry Template”.



29. At "3. Map Form Fields", map the eForm form fields to the Content Engine Form Data Document subclass (for example, "Case Management Form") properties. (In the case of the Case Management sample application, make sure the mapping is two-way for all fields/properties except for DocEntryStatus.)

http://hqdemo1:9081 - Workplace: Document Policy Wizard - Microsoft Internet Explorer

Administrator | Tuesday, April 3, 2007 Help | Close

**Add Document Policy**

**Create Policy**

- 1. Select Form Template
- 2. Select Entry Template
- 3. Map Form Fields**

**Save Policy**

- 4. Select Folder
- 5. Set Properties
- 6. Set Security

Class: **Case Management Form**

Items Found: 7 Show Items: 10

Published Form Fields	Dir	Class Properties
Priority (Text)	<=>	CasePriority (string)
AccountNumber (Text)	<=>	AccountNumber (string)
EffectiveDate (Date)	<=>	EffectiveDate (date)
ReceivedDate (Date)	<=>	ReceivedDate (date)
ContractAmount (Number)	<=>	ContractAmount (float)
CompanyName (Text)	<=>	CompanyName (string)
DocEntryStatus (Number)	<--	DocEntryStatus (int)

Summary:

Object Store: *Sp8ObjectStore*

Form Template: *New eForm Case - Case Management*

Entry Template: *CreateCaseEntryTemplate*

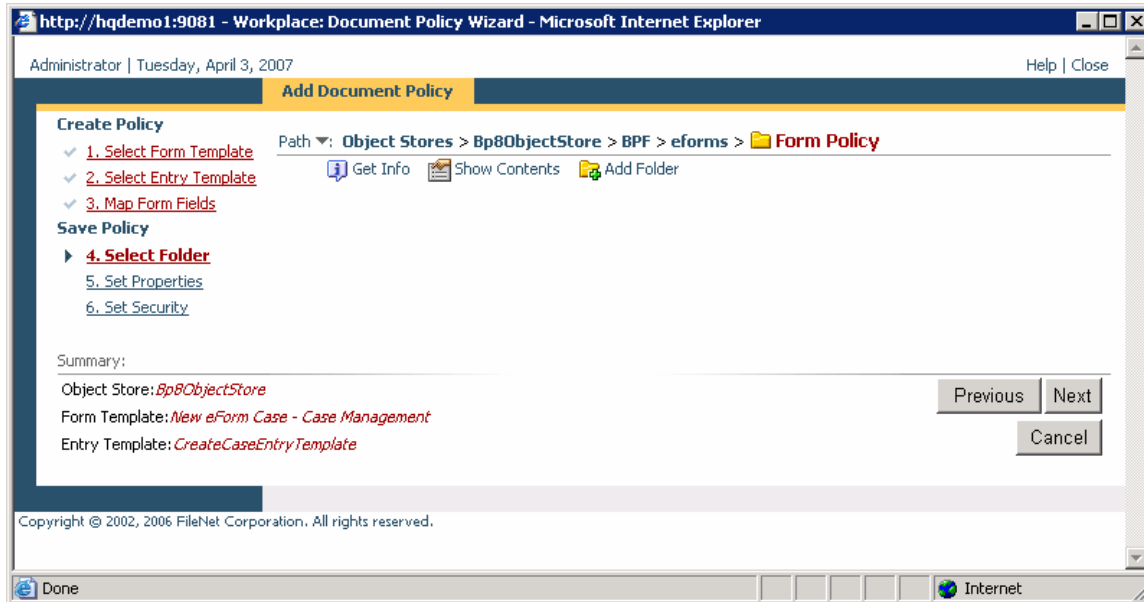
Previous Next

Cancel

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Done Internet

30. At "4. Select Folder", select the Content Engine Folder in which you wish to save the policy.



31. At "5. Set Properties ", specify a Document Title for your Form Policy ("eFormsCreateCasePolicy" in the case of the Case Management sample application).

Add as Major Version must be set to Yes, and then click "Next".

http://hqdemo1:9081 - Workplace: Document Policy Wizard - Microsoft Internet Explorer

Administrator | Tuesday, April 3, 2007 Help | Close

**Add Document Policy**

**Create Policy**

- 1. Select Form Template
- 2. Select Entry Template
- 3. Map Form Fields
- Save Policy
- 4. Select Folder
- 5. Set Properties**
- 6. Set Security

**Class: Form Policy**

Property	Value
Document Title:	eFormsCreateCasePolicy
Form Policy Description:	

**Options**

Add as major version: Yes

Offline Options	Value
Take Policy Offline:	Enabled
Bring Form Online:	Use original Policy version when bringing online
Form Online Display:	Show Form always

Summary:

Object Store: Bp8ObjectStore

Form Template: New eForm Case - Case Management

Entry Template: CreateCaseEntryTemplate

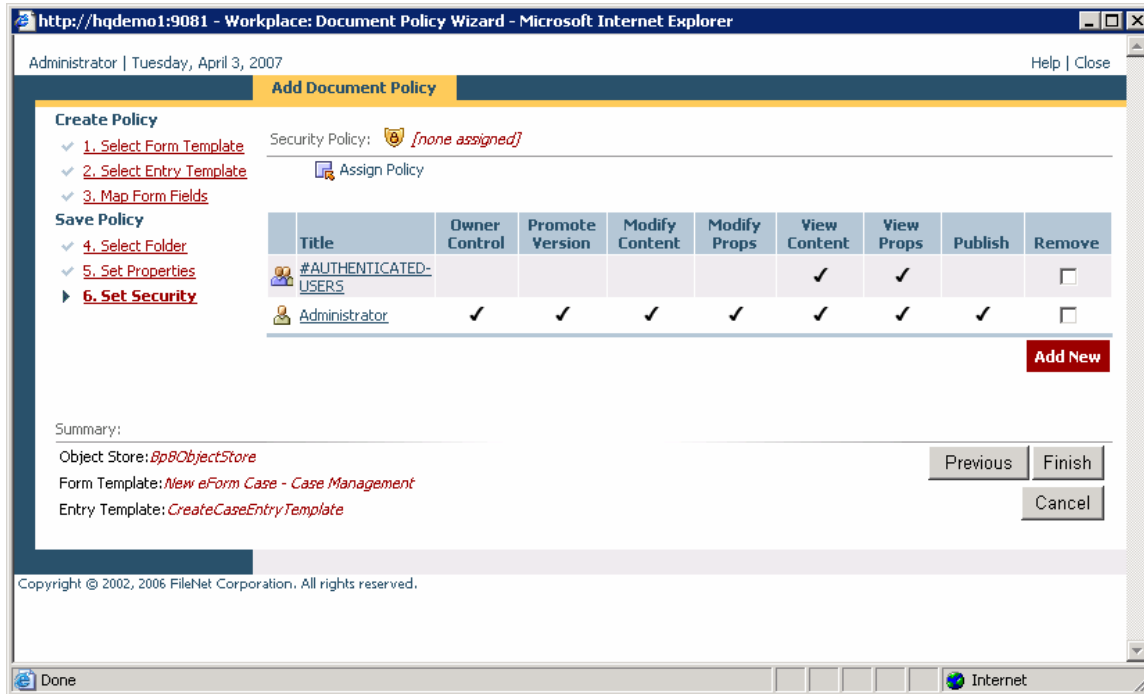
Previous Next

Cancel

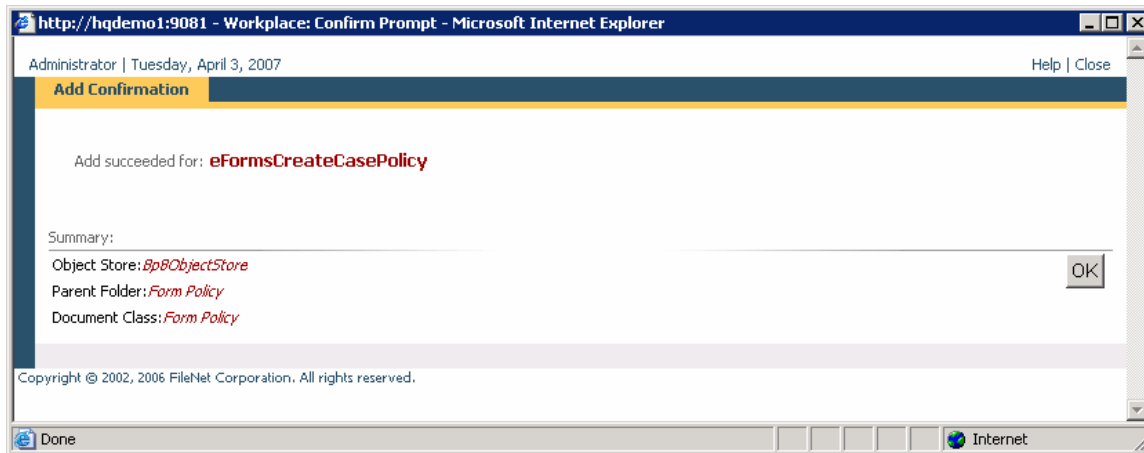
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Done Internet

32. At "6. Set Security ", apply the appropriate security settings, then click "Finish".



33. Click "OK" on the "Add Confirmation" screen.



## Process Engine Changes for eForms Integration

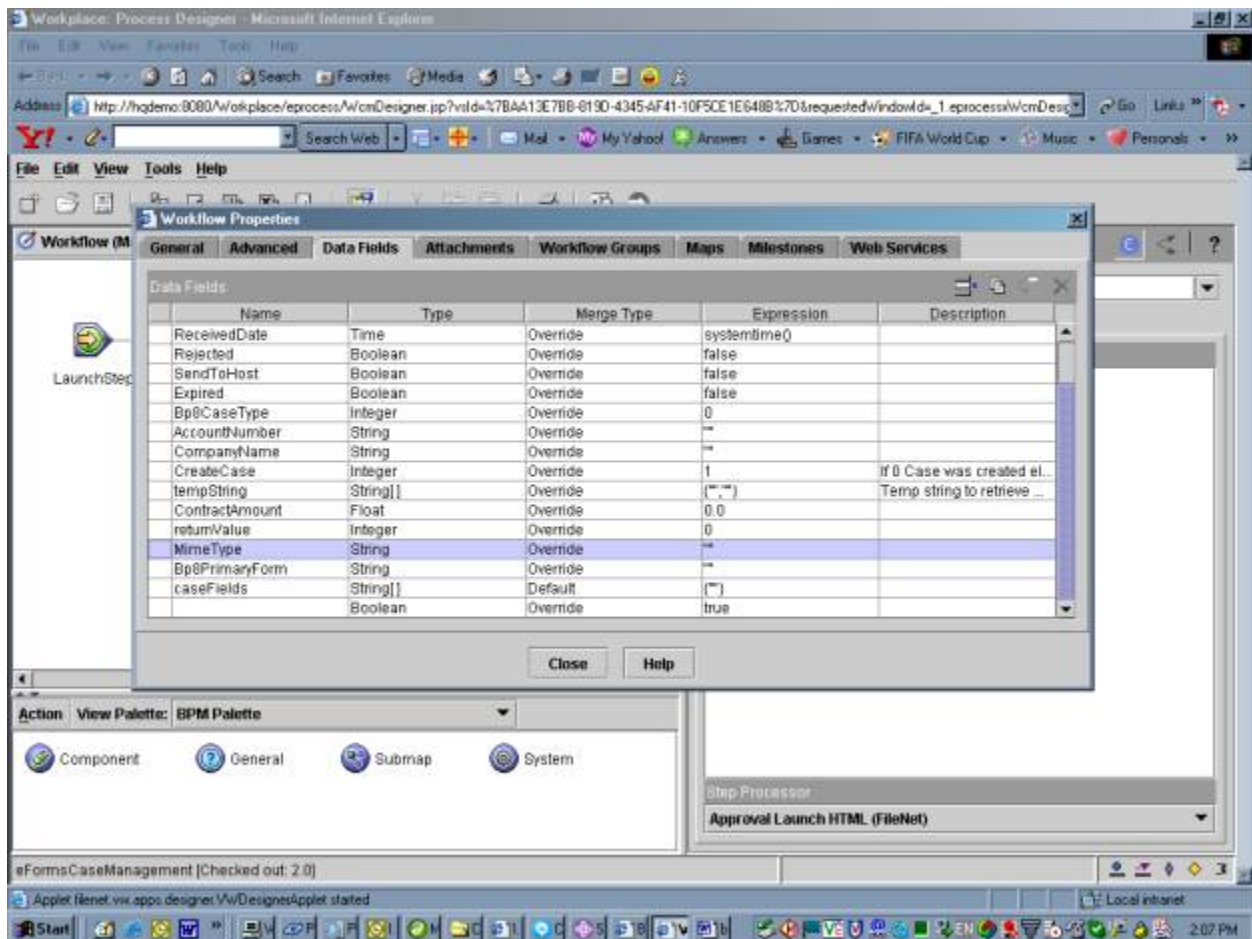
The functional aspects of the BPF eForms Tab and eForm Case Creation Tool have now been covered. The following sections cover in greater detail some of the underlying changes in PE, the BPF Metastore, and Content Engine (CE) that are required to get this functionality to work, beginning, in this section, with PE.

### Transfer New Workflow Definition to Process Engine

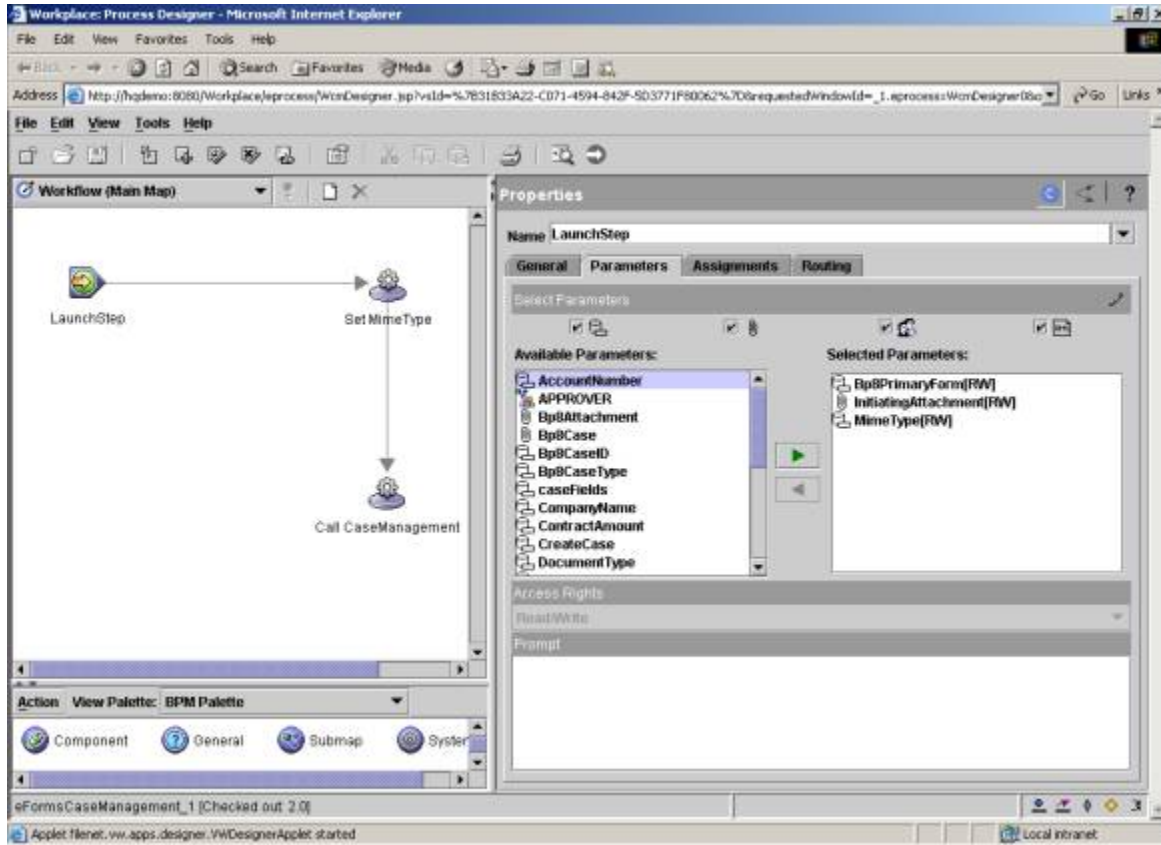
A new Workflow map (**eFormsCaseManagement.pep**) will be provided as part of the Case Management sample application that ships with the BPF install media. This map contains several enhancements over the old **CaseManagement.pep** file, all specifically related to eForms integration. The design is that this workflow will be launched through a Content Engine Workflow Subscription created on the "Case Management Form" Content Engine Document class (a subclass of Form Data), triggered whenever a new instance of this class is created ("Creation Event") through the eForm Case Creation Tool, for example.

34. Specifically, the new Workflow map will have the following eForms-specific data fields:

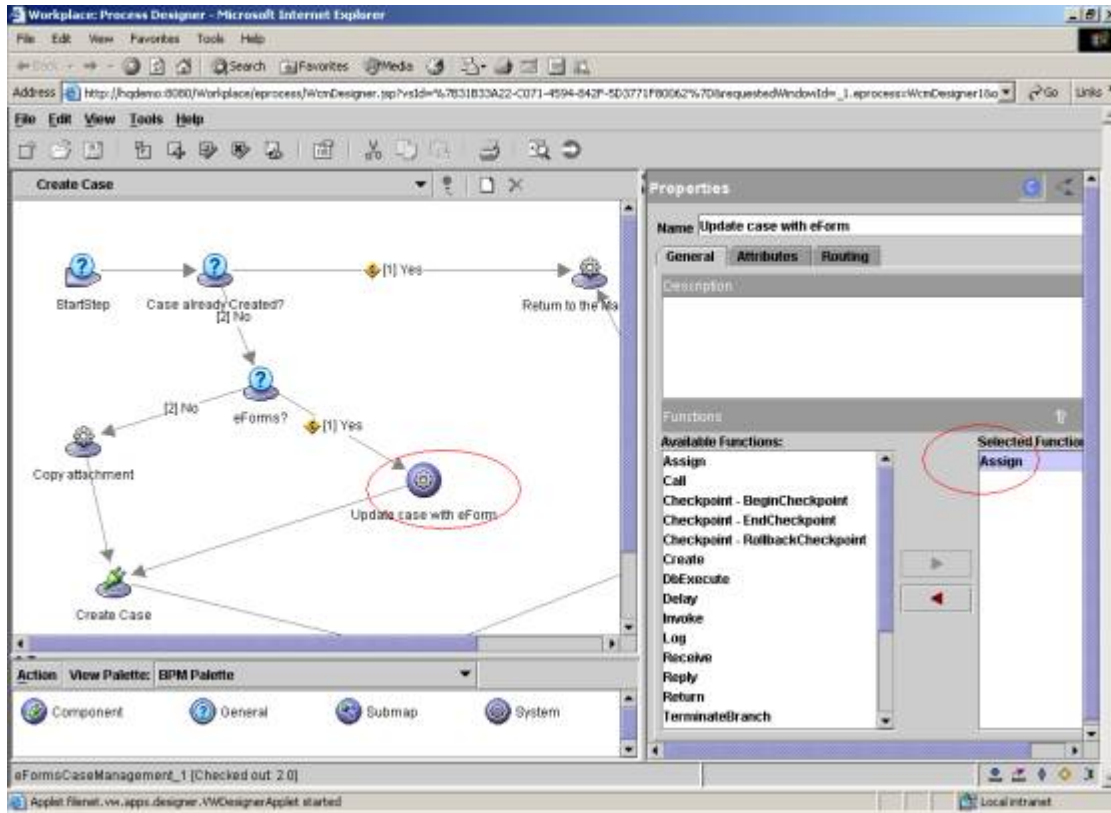
- **MimeType**: - for holding the mimeType of eForm. This will be used for a conditional check in the Workflow map.
- **Bp8PrimaryForm**: - for holding the "vsld" of the eForm used to launch this Workflow.



35. This map acts as a "starter" workflow, which will then call the regular Case Management workflow after setting the MimeType value to "application/x-filenet-formdata". The values of these two properties, plus the InitiatingAttachment VWAttachment field (containing a reference to the new Form Data Document object itself in Content Engine), will then be transferred to the Case Management Workflow.

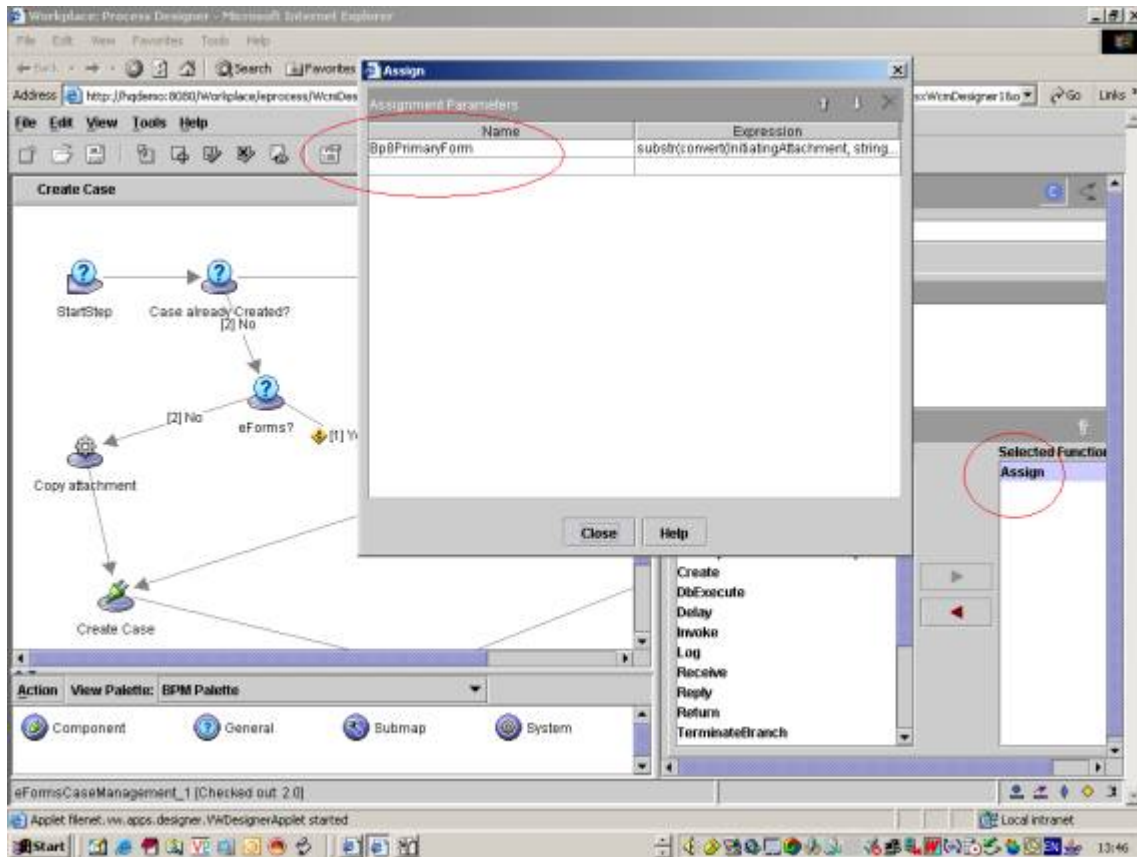


36. The Case Management Workflow includes a System step called "Update case with eForm" in the "Create Case" submap. This step will be executed if it is determined that the current Work Object was launched through the Content Engine Workflow Subscription on the Creation Event of a "Case Management Form" Content Engine Document instance.





37. This System Assignment Step will assign the Case Management Form document to the Bp8PrimaryForm Attachment field on the Work Item.



Both process maps can be found in the BPF installation media in the following directory:

\\misc\solutions\case\_management\config

The BPF Installation process will not add or transfer the **eFormsCaseManagement.pep**. It has to be manually added to the Content Engine and then transferred via Process Designer. Before adding the .pep file to the Content Engine, the default ObjectStore name needs to be modified to the site-specific ObjectStore name used in the BPF application in the three component steps; Create Case, Update Case and Attach Doc. You can use Process Designer or any XML editor to modify the ObjectStore name. The default ObjectStore name used in the **eFormsCaseManagement.pep** file is "**Bp8ObjectStore**".

**NOTE** The specifics of the preceding section apply only to the Case Management sample application. For custom implementations of this feature, the Workflow map(s) may be different, but should still support the configuration described above.

You have now completed the required steps for enabling your deployment of the eForm Case Creation Tool to function as designed in your environment. Please take a moment to test this functionality by launching the BPF Web Application and clicking on the BPF Create Case tool. You should see the Form Template come up, allowing you to enter form field values before selecting the Save button, creating and saving a new Form Data document in Content Engine and launching the Workflow to create a new BPF Case.

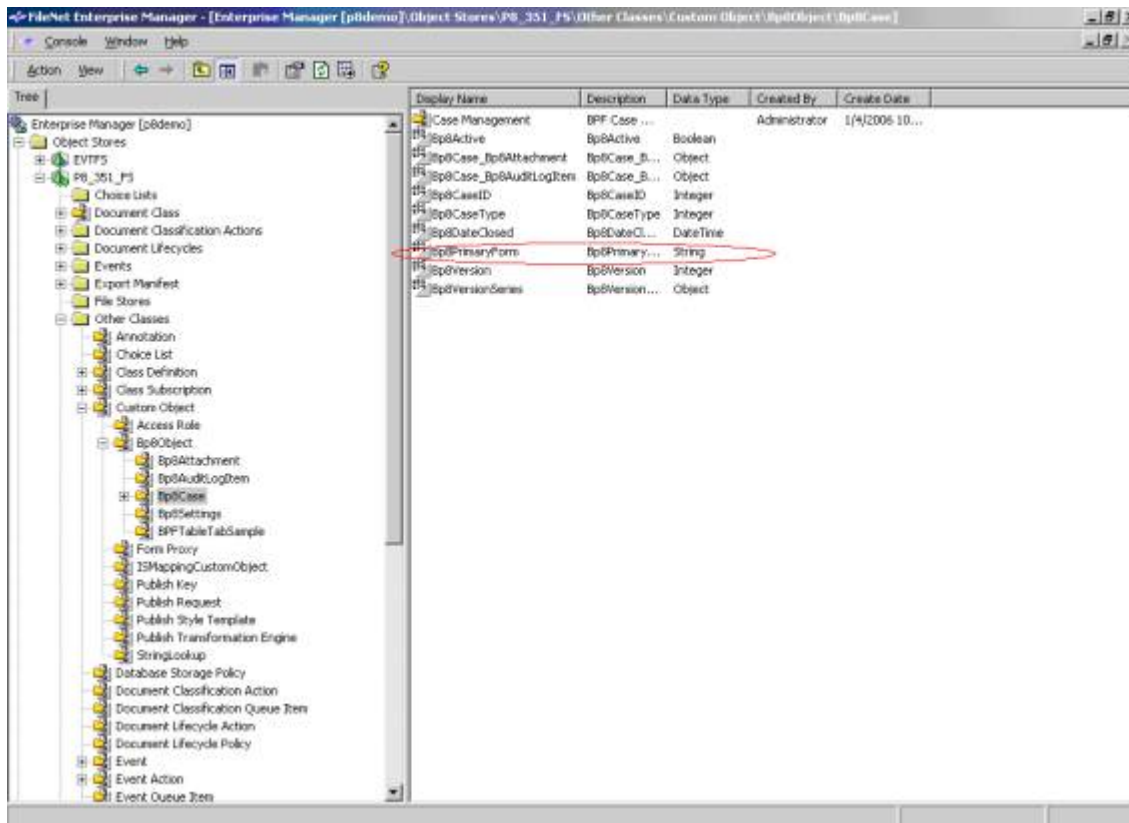
**NOTE** BPF\_Operations need to be running in BPM Process Task Manager's Component Manager in order for your new Case to be created and appear in the first Inbasket.

If you encounter any problems in the course of this test, please review the preceding portions of this document carefully before consulting support to see what you might have missed in the course of your configuration and deployment.

## Content Engine Changes for eForms Integration

### Bp8PrimaryForm

The BPF Installation process imports a Content Engine manifest (**ce\_base.xml**) with the necessary custom object structure to support BPF applications. An additional case property has been added to this manifest to support eForms integration to BPF. It is a string type property called “Bp8PrimaryForm”, and is found in the “Bp8Case” class. This property will hold the “vslid” (version\_series\_id) of the eForm associated with the Case.



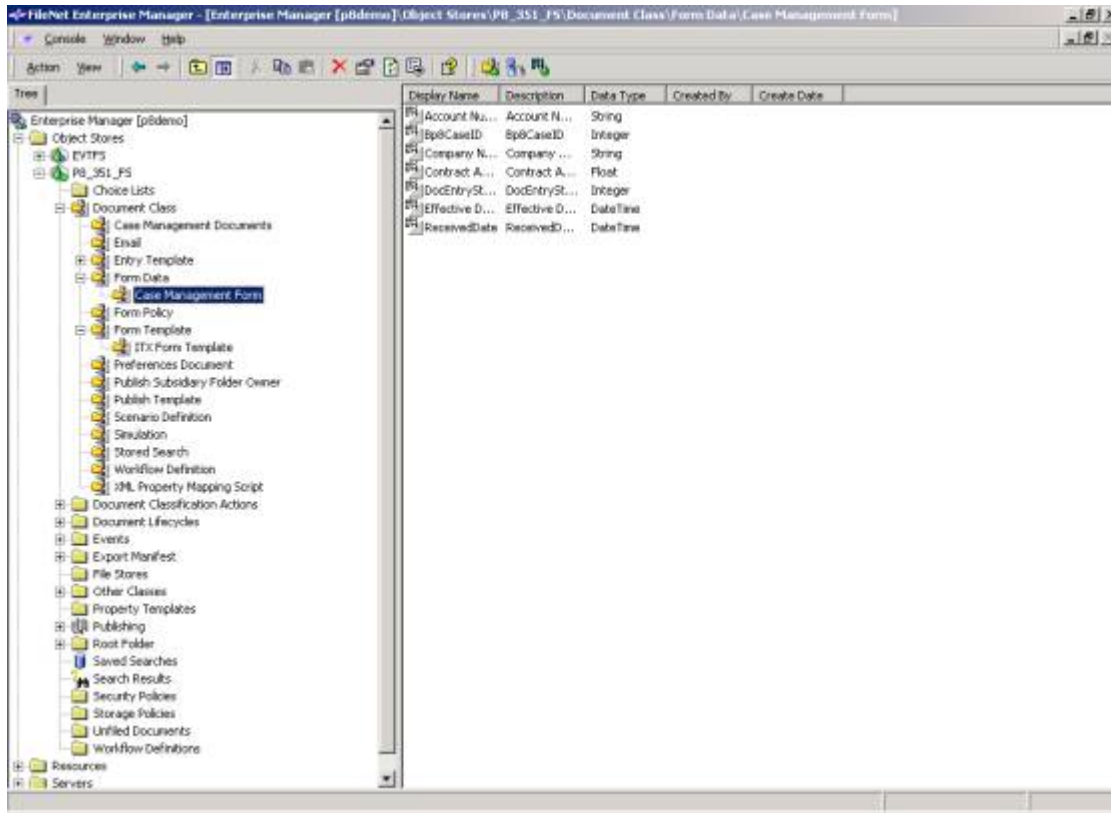
**NOTE** Existing Case objects created before the introduction of eForms Integration to BPF will not have the Bp8PrimaryForm property. Users will not be able to attach/view eForms on these Case objects.

Create the Bp8PrimaryForm property in the Bp8Case subclass or verify that it was imported using the ce\_base.xml during the installation process.

### Form Document Class and Properties

When implementing eForms, a Form Document Class is typically created to define the Form Data to be stored for each Form instance. When the eForm is to be used with BPF, it is important to define the properties of the Form with the same name as the properties of the BPF Case object. This is how BPF synchronizes the data between the eForm and the Case object.

The BPF Installation process imports a Content Engine manifest (**ce\_cm.xml**) with the necessary custom object structure to support the BPF Case Management sample application. This manifest contains a form document class called "Case Management Form" which is added under "Form Data" class when imported into Content Engine. It has all the same properties as the Case Management case object.



Define a Form Data subclass and properties or verify that it was imported using the ce\_cm.xml during the installation process.

## Create a Content Engine Workflow Subscription

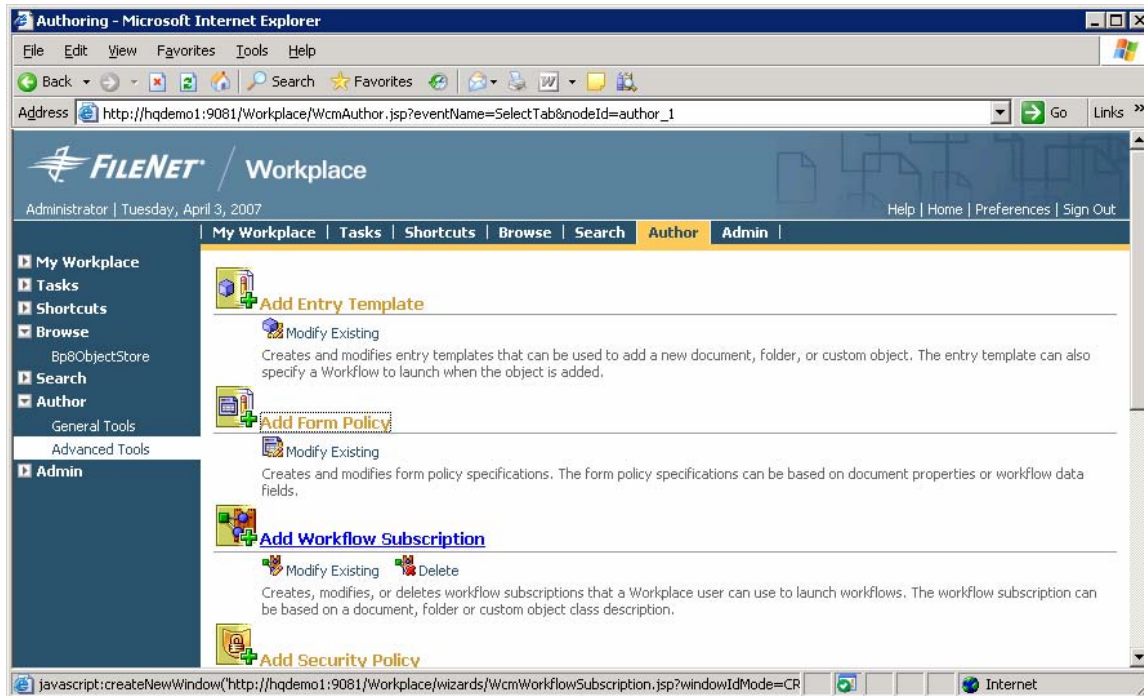
Once your process map is transferred into the PE Isolated Region, you will need to configure a Content Engine Workflow Subscription for the "Creation Event" of the "Case Management Form" Content Engine Document class. The result is that when the eForm Case Creation Tool is executed and creates a new form in this document class, the subscription will launch the eformsCaseManagement workflow which creates a new BPF Case.

The Case Management sample application is designed to show you the steps involved in creating new cases from eForms. Custom solutions will vary in their particulars, but, in each case, the logic of the steps involved will be the same.

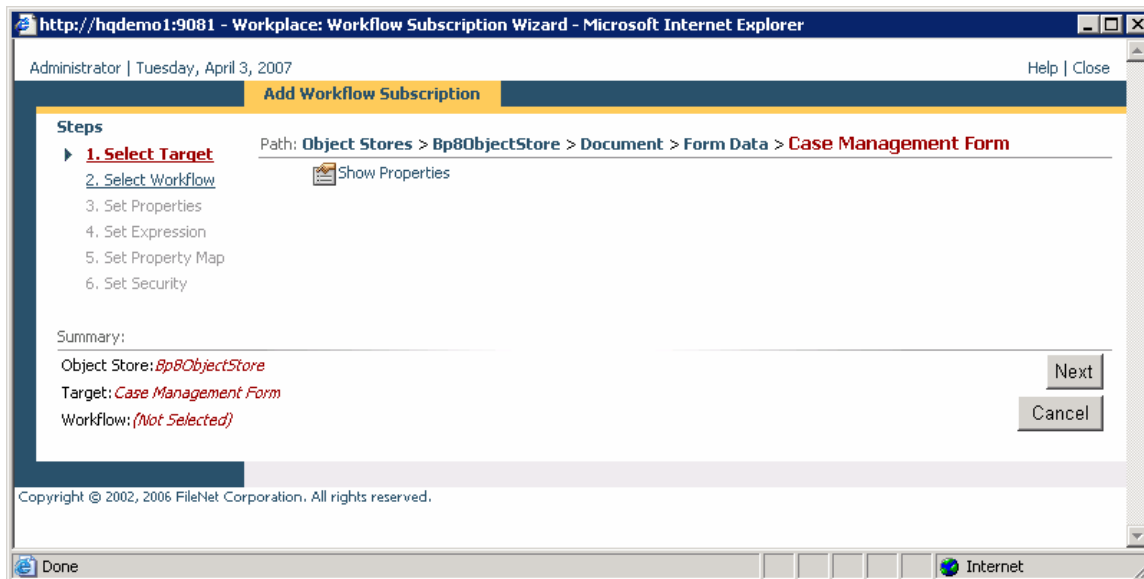
You can create a Workflow Subscription either through Enterprise Manager or through Workplace. The following verbiage and screenshots describe the process for Workplace only.

To create the required Content Engine (CE) Workflow Subscription for the Case Management sample application using Workplace, the following steps are required.

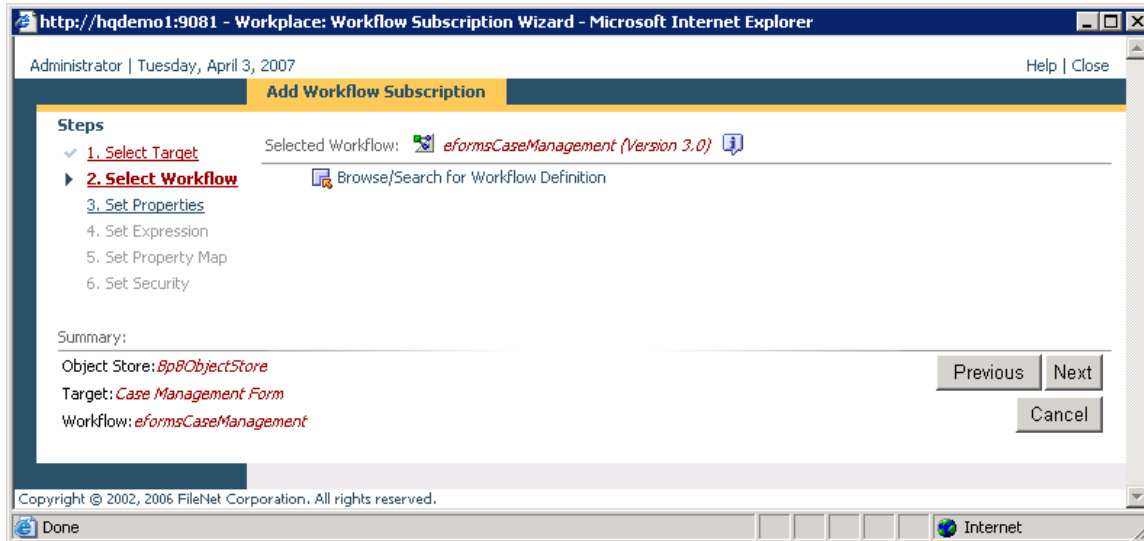
38. First, navigate to Workplace > Author > Advanced Tools and select Add Workflow Subscription.



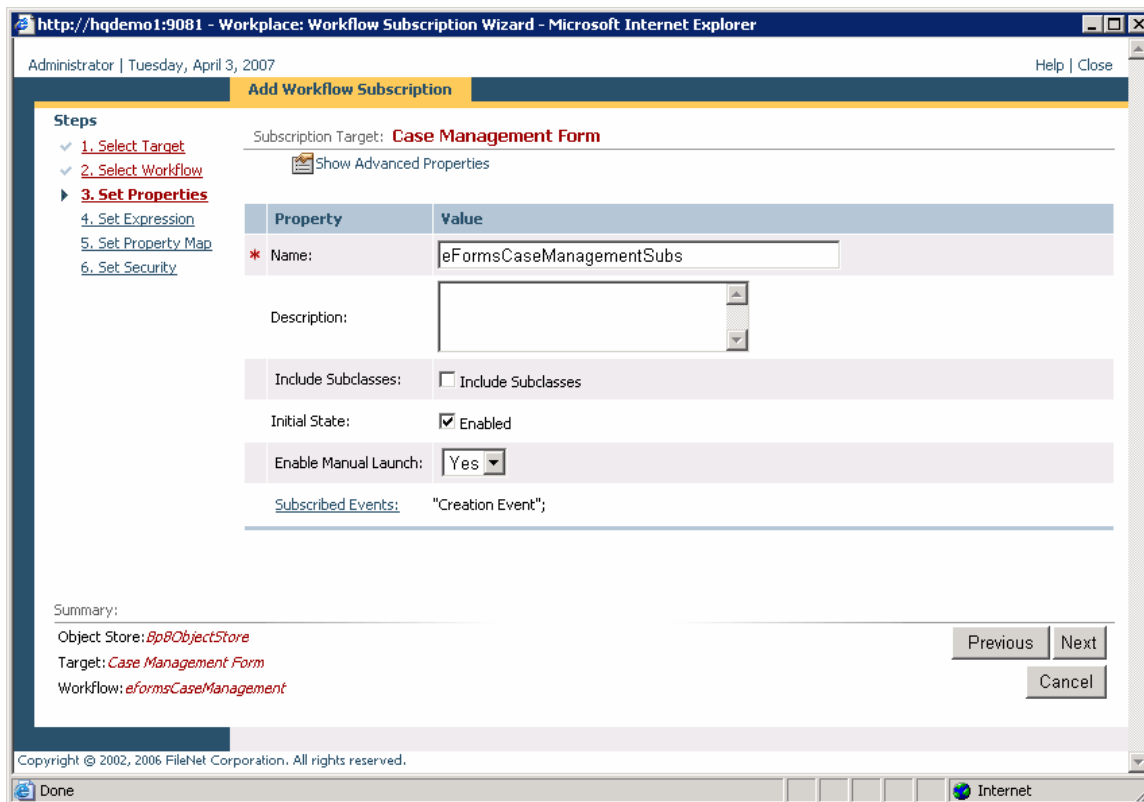
39. At "1. Select Target ", choose the Object Store and subclass of the "Form Data" Document class whose "Creation Event" you want to trigger your Workflow.



40. At "2. Select Workflow", select the new "eFormsCaseManagement" Workflow.



41. At "3. Set Properties > Subscribed Events", add "Creation Event" and set "Enable Manual Launch" to "Yes" or "No" as desired (neither setting will affect normal use of this Subscription).



42. At "4. Set Expression", use the Event Expression builder to specify the condition DocEntryStatus=1.

**NOTE** Due to an issue with Content Engine itself, this filter condition is required to avoid launching the Workflow each time a "Case Management Form" instance is checked in.

http://hqdemo1:9081 - Workplace: Workflow Subscription Wizard - Microsoft Internet Explorer

Administrator | Tuesday, April 3, 2007 Help | Close

**Add Workflow Subscription**

**Steps**

- 1. Select Target
- 2. Select Workflow
- 3. Set Properties
- 4. Set Expression**
- 5. Set Property Map
- 6. Set Security

Subscription Target: **Case Management Form**

**Event expression builder**

DocEntryStatus (Integer) =

and or ( ) not

Event expression:

DocEntryStatus=1

Summary:

Object Store: *Bp8ObjectStore*

Target: *Case Management Form*

Workflow: *eformsCaseManagement*

Previous Next

Cancel

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Done Internet

43. At "5. Set Property Map", map the "eFormsCaseManagement" Workflow fields to the "Case Management Form" Document class fields (AccountNumber, ContractAmount, ReceivedDate, Priority, and CompanyName).

http://hqdemo1:9081 - Workplace: Workflow Subscription Wizard - Microsoft Internet Explorer

Administrator | Tuesday, April 3, 2007

Help | Close

**Add Workflow Subscription**

**Steps**

- 1. Select Target
- 2. Select Workflow
- 3. Set Properties
- 4. Set Expression
- 5. Set Property Map**
- 6. Set Security

Subscription Target: **Case Management Form**

Data Field Name	Property Name
CompanyName (String)	Company Name (String)

**Property Map**

```
AccountNumber=AccountNumber
ContractAmount=ContractAmount
ReceivedDate=ReceivedDate
CompanyName=CompanyName
```

Summary:

Object Store: *Bp8ObjectStore*

Target: *Case Management Form*

Workflow: *eformsCaseManagement*

Previous Next

Cancel

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Done Internet

44. At "6. Set Security ", apply the appropriate security settings and then click Finish.

http://hqdemo1:9081 - Workplace: Workflow Subscription Wizard - Microsoft Internet Explorer

Administrator | Tuesday, April 3, 2007

Help | Close

**Add Workflow Subscription**

**Steps**

- 1. Select Target
- 2. Select Workflow
- 3. Set Properties
- 4. Set Expression
- 5. Set Property Map
- 6. Set Security**

Title	Owner Control	Modify Props	View Props	Remove
#AUTHENTICATED-USERS			✓	<input type="checkbox"/>
Administrator	✓	✓	✓	<input type="checkbox"/>

Add New

Summary:

Object Store: *Bp8ObjectStore*

Target: *Case Management Form*

Workflow: *eformsCaseManagement*

Previous Finish

Cancel

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Done Internet

You have now successfully created the Content Engine Workflow Subscription required to launch a Workflow to create a new BPF Case whenever the eForm Case Creation Tool is used to create a new instance of the "Case Management Form" Content Engine Document class.



## Modifying Form Template

Users may modify the existing Case.itx Form Template as per project requirements by completing the following sections below.

### Updating Form Template P8 Workplace

Step 1. The existing Form Template can be modified using eForms Designer. To do this, download the Form Template to be modified from Workplace and open it using eForms Designer. Perform form modifications.

Step 2. After modifying the Form Template Policy check it back into the Content Engine using Workplace.

### Updating Form Policy in P8 Workplace

Step 3. After the Form Template is modified and checked in, the version of the Form Template will be updated. Because of this, we will need to modify the Form Policy attached to the Form Template to use the correct version. This can be accomplished by performing the following steps below:

45. Go to Workplace > Author > Advanced Tools
46. Under "Add Form Policy" click "Modify Existing"
47. Select "Document Policy"
48. Browse to the Form Policy you want to change and select that Form Policy.
49. At "1. Select Form Template", browse to the modified Form Template. Click on "Select Current" to select the current version of the Form Template.
50. Click "Finish".

### Updating BPF Application

Anytime the Form Template is updated, you must update the the Form Template ID which will be accessed in the BPF application when the eForm Case Creation tool is launched.

Refer to the section in this document entitled *Configuring the Access Method of the eForm Case Creation Tool* which describes how to set the Form Template ID based on access method.

## Summary of BPF/eForms Configuration

The following is a summary of the necessary steps involved in configuring eForms Integration to BPF. Use this as a quick check point for troubleshooting your eForms configuration. Detailed documentation of each step is covered under different sections in this document above.

- Verify eForms functionality with Workplace application alone. Opening, closing, saving, and PDF generation of eForms should already be functional within the Workplace application.
- Verify that BPF/eForms workflow (eFormsCaseManagement.pep) is transferred to the isolated region after verifying that it references the correct ObjectStore name.
- Verify that the necessary eForms configuration files (eforms-functions.xml and eforms-integration.xml) are present in the BPF configuration directory.
- Verify that the metastore type that you are using for the BPF Application has been configured in the BPF Operation configuration file. (Bp8\_config.xml)
- Verify that the event subscription for the Form Document Class (Case Management Form) has been set to auto-launch and is working properly.
- Verify that Bp8ViewActions.jsp is present inside the Workplace folder. This step is the part of the BPF installation.



- Verify the workflow subscription on “Case Management Form” class is working properly.
- Verify <bpf-app>/WEB-INF/toolbar.xml for correct eForm template object\_id and version\_series\_id.
- Using BPF Explorer, verify that the eForms tab is exposed on required Inbasket Configurations.
- Verify that following steps were performed in the following order:
  - Add Form Template
  - Add Entry Template
  - Add a Form Policy



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