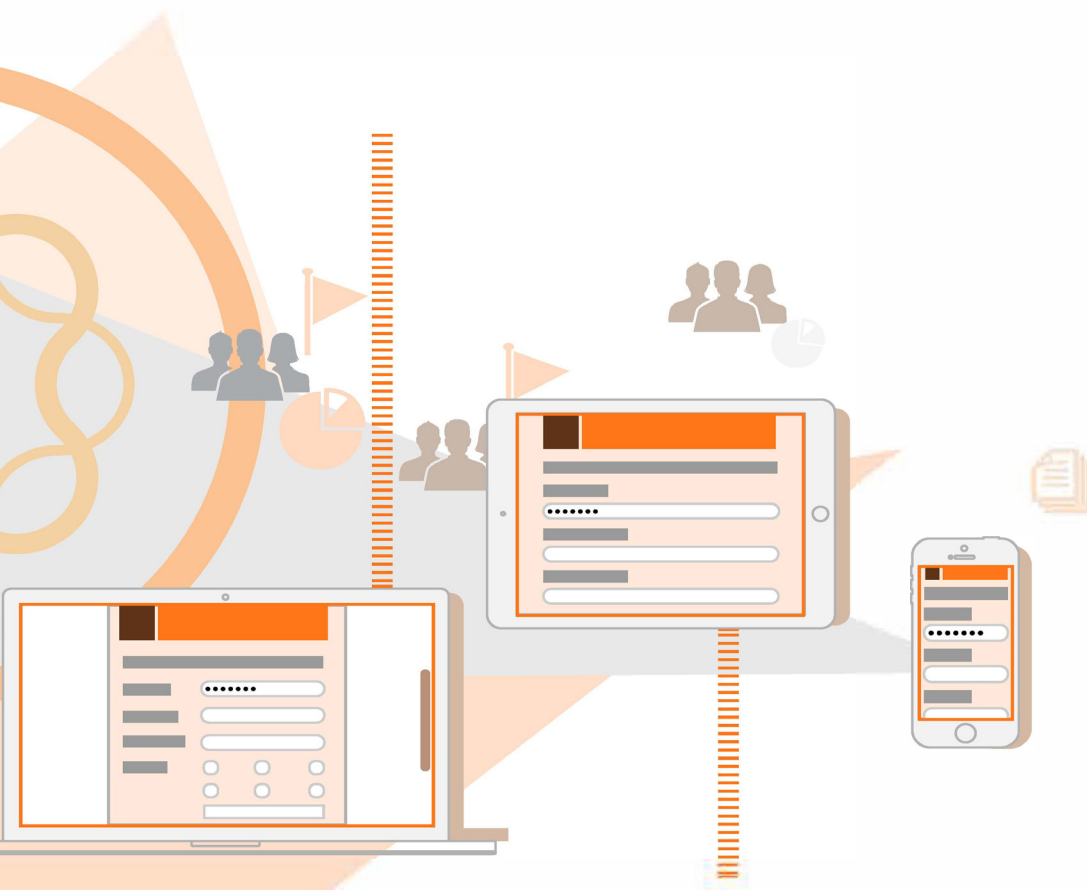


# Upgrading to Adobe Experience Manager Forms on JEE for JBoss



**AEM 6.5 Forms**

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# 1. About this document

AEM Forms on JEE is an enterprise server platform that helps you automate and streamline business processes. AEM Forms on JEE comprises the following components:

- J2EE-based Foundation provides server capabilities and runtime environment
- Tools to design, develop, and test AEM Forms on JEE Applications
- Modules and Services are deployed on AEM Forms on JEE Server, and provide functional services

For more information about the AEM Forms on JEE capabilities, see [Introduction to AEM Forms](#).

## 1.1. Who should read this document?

This guide provides information for administrators and developers responsible for installing, upgrading, configuring, administering, or deploying AEM forms on JEE. It is assumed that readers are familiar with J2EE application servers, operating systems, database servers, and web environments.

## 1.2. Conventions used in this document

The installation and configuration documentation for AEM Forms on JEE uses the following naming conventions for common file paths.

Name	Default value	Description
<i>[aem-forms root]</i>	Windows: C:\Adobe\Adobe_Experience_Manager_Forms Linux: /opt/adobe/Adobe_Experience_Manager_Forms	The installation directory that is used for all AEM Forms on JEE modules. The installation directory contains subdirectories for Configuration Manager. This directory also includes directories related to the SDK and third-party products.
<i>[appserver root]</i>	JBoss Application Server on Windows: C:\Adobe\Adobe_Experience_Manager_Forms\jboss JBoss Application Server on Linux: /opt/jboss/	The application server directory that is used for all AEM Forms on JEE modules.

## 2. Introduction to upgrade

### 2.1. About installing, configuring, and deploying AEM Forms on JEE

Most of the work involved in upgrading from AEM 6.3 Forms on JEE or AEM 6.4 Forms on JEE to AEM 6.5 Forms on JEE is done by Configuration Manager. The tasks that are specific to upgrade are integrated seamlessly into the configuration and deployment process.

Installing, configuring, and deploying AEM Forms on JEE involves the following processes:

**Installing:** You install AEM Forms on JEE by running the installation program. Installing AEM Forms on JEE places all the required files onto your computer, within one installation directory structure. The default installation directory is C:\Adobe\Adobe\_Experience\_Manager\_Forms (Windows) or /adobe/Adobe\_Experience\_Manager\_Forms (Linux or UNIX); however, you can install the files to a different directory

**Configuring and assembling:** Configuring AEM Forms on JEE modifies a variety of settings that determine how AEM Forms on JEE works. Assembling the product places all the installed components into several deployable EAR and JAR files according to your configuration instructions. Configure and assemble the components for deployment by running Configuration Manager.

**Configuring the application server:** You can choose to let Configuration Manager configure the application server. You already performed some configuration tasks when you prepared the environment for upgrading; however, you still have a few tasks to do after AEM Forms on JEE is installed, such as configuring Java™ Virtual Machine (JVM™) arguments, configuring the data source connections, and setting some time-out values.

**Deploying:** Deploying the product involves deploying the assembled EAR files and supporting files to the application server on which you plan to run your AEM Forms on JEE. If you configured and assembled multiple modules, the deployable components are packaged within the deployable EAR files. Components and LiveCycle archive files (LCAs) are packaged as JAR files. Configuration Manager automatically deploys the EAR files, components, and archive files to the application server.

**Deploying:** Deploying the product involves deploying the assembled EAR files and supporting files to the application server on which you plan to run your AEM forms on JEE. If you configured and assembled multiple modules, the deployable components are packaged within the deployable EAR files. Components and LCAs are packaged as JAR files. Configuration Manager automatically deploys the components and archive files to the application server. You must manually deploy the EAR files to JBoss.

**Initializing the database:** Initializing the database creates tables for use with User Management and other components. Configuration Manager initializes the AEM Forms on JEE database after the EAR deployment process.

## 2.2. How the AEM Forms on JEE upgrade works

Upgrading to AEM Forms on JEE involves these tasks:

- 1) Preparing your environment for the upgrade
- 2) Installing AEM Forms on J2EE
- 3) Running Configuration Manager to initiate the configure, upgrade, and deployment processes
- 4) Upgrading the CRX repository and migrating essential existing data
- 5) Performing post-deployment upgrade tasks

## 2.3. Upgrade and deployment checklist

You can use the [Upgrade Checklist and Planning](#) guide to ensure that you have all the information required to upgrade to AEM Forms on JEE. Use the checklist to also verify if the upgrade process installed AEM Forms on JEE correctly and if all the components/modules are working.

## 3. Installing AEM Forms modules

### 3.1. Before you begin

#### Installation overview

Before you install the modules, ensure that your environment includes the software and hardware that is required to run AEM Forms on JEE. You should also understand the installation options and have the environment prepared as required. For more information, see the Preparing to Install (Singer Server or Server Cluster) or Preparing to Upgrade guide. The complete AEM Forms on JEE documentation is available at [http://www.adobe.com/go/learn\\_aemforms\\_tutorials\\_65\\_en](http://www.adobe.com/go/learn_aemforms_tutorials_65_en).

If you are upgrading, before you run the AEM Forms on JEE installation and configuration, you must back up your existing data. If you are moving to a new version of the same database, prepare the database as described in the [Preparing to Install AEM forms on JEE](#)

guide and then migrate your data to the new database using its backup/restore/migration utility. If you are moving to a new operating system or application server, review the configuration information in the [Preparing to Install AEM forms on JEE](#)

guide.

AEM Forms on JEE also provides a command line interface (CLI) for the installation program. See Appendix - Install Command Line Interface for instructions on using the CLI. There is also a CLI for Configuration Manager. See Appendix - Install Command Line Interface. These CLIs are intended to be used by advanced users of AEM Forms on JEE in server environments that do not support the use of the GUI of the installation program or the Configuration Manager, or for users who wish to implement batch (non-interactive) installation capabilities.

#### Checking the installer

Observe the following best practices with the installer files before you begin the installation process.

##### Check the DVD installation media

Ensure that the installation media that you received is not damaged. If you copy the installation media contents to the hard disk of your computer where you are installing AEM Forms on JEE, ensure that you copy the entire DVD contents on to the hard disk. To avoid installation errors, do not copy the DVD install image to a directory path that exceeds the Windows maximum path length limit.

Install AEM Forms on JEE either by using a local copy of the installation files or directly from the DVD. The installation could fail when AEM Forms on JEE is installed over the network.

### Check the downloaded files

If you downloaded the installer from the Adobe website, verify the integrity of the installer file using the MD5 checksum. Do one of the following to calculate and compare the MD5 checksum of the downloaded file with the checksum published on the Adobe licensing website:

- **Linux:** Use the `md5sum` command
- **Windows:** Use a tool such as WinMD5

### Expand the downloaded archive files

If you downloaded the ESD from the Adobe website, extract the entire `aemforms_server_6_5_0_jboss_all_win.zip` (Windows) or `aemforms_server_6_5_0_jboss_all_unix.tar.gz` (Linux) archive file to your computer.

**NOTE:** Be sure to keep the directory hierarchy unchanged from the original ESD file.

### (Linux only) Validate Entropy

Check the available entropy on your RHEL server prior to the installation. Use the following command to check entropy:

```
cat /proc/sys/kernel/random/entropy_avail
```

If it returns anything less than 100-200, the deployment will fail with a timeout.

Perform the following steps to resolve the issue:

- Locate the configuration file in the JBoss installation directory:  
`[jboss_installation_directory]/standalone/configuration/`
- Add the following command in the configuration file:  
`JAVA_OPTS="$JAVA_OPTS -Djava.security.egd=file:/dev/./urandom"`

### (Linux only) Validate Entropy

Check the available entropy on your RHEL server prior to the installation. Use the following command to check entropy:

```
cat /proc/sys/kernel/random/entropy_avail
```

If it returns anything less than 100-200, the deployment will fail with a timeout.

Perform the following steps to resolve the issue:

- Locate the configuration file in the JBoss installation directory:  
`[jboss_installation_directory]/domain/configuration/`
- Add the following command in the configuration file:  
`JAVA_OPTS="$JAVA_OPTS -Djava.security.egd=file:/dev/./urandom"`

### Identify the version of configured CRX repository

- 1) Open AEM Forms web console. The default URL is `http://[port]:[server]/lc/system/console/bundles`.
- 2) Open the Status menu and then click the Sling Settings option.
- 3) Verify the values of the Run Modes property. The second value of the Run Modes property specifies the version of the CRX repository. For example, for the following run mode, the version of the repository is CRX3:

```
Run Modes = [livecycle, s7connect, crx3, author, nosamplecontent,  
crx3tar]
```

## 3.2. Installation considerations

### Installation paths

To successfully install, you need read, write, and execute permissions on the installation directory. The following also apply to the installation paths:

- When installing AEM Forms on JEE, do not use double-byte or extended Latin characters (such as àâçéèëïïôùûÄÖÛ) in the installation path.
- On Windows, the AEM Forms on JEE installation directory path must not contain any non-ASCII characters (for example, international characters such as é or ñ).
- On UNIX-based systems, you must be logged in as the root user to successfully install the modules. If you are logged in as a non-root user, change the installation directory to one on which you have permissions (read-write-execute privileges).
- On Windows, you must have administrator privileges to install AEM Forms on JEE.

### Temporary directories

Temporary files are generated in the temp directory. In certain instances, the generated temporary files may remain after the installer is closed. You can remove these files manually.

When installing on Linux, the installation program uses the logged-in user's home directory as a temporary directory for storing files. As a result, messages such as the following may appear in the console:

```
WARNING: could not delete temporary file /home/<username>/ismp001/1556006
```

When you complete the installation, you must manually delete the temporary files from the following directories:

- (Windows) TMP or TEMP path as set in the environment variables
- (Linux) Logged-in user's home directory

On UNIX-based systems, a non-root user can use the following directory as the temporary directory:

- (Linux) /var/tmp or /usr/tmp

## Installing on a Windows staging platform for Linux or UNIX

AEM Forms on JEE can be installed and configured on Windows for deployment on a Linux or UNIX platform. You can use this functionality for installing on a locked-down Linux or UNIX environment. A locked-down environment does not have a graphical user interface installed. For the Linux or UNIX platform, the installation program installs binaries that are used by Configuration Manager to configure the product.

The computer running Windows can then be used as a staging location for the deployable objects, which can be copied to a Linux or UNIX computer for deployment to the application server. The application server on the Windows-based computer, and the Linux or UNIX target computer on which you want to install AEM forms on JEE must be the same.

### General installation notes

- On Windows, improve the speed of installation by disabling any on-access virus scanning software during installation. For details, see [Using an antivirus on server running AEMForms](#)
- .
- If you are installing on UNIX-based systems and are not installing directly from a release DVD, set executable permissions on the installation file.
- To avoid permission issues during deployment, ensure that you run the AEM Forms on JEE installer and Configuration Manager as the same user who will run the application server.
- If you are installing on UNIX-based computers, the installation directory you specify should not contain any spaces.
- If errors occur during installation, the installation program creates the `install.log` file, which contains the error messages. This log file is created in the `[aem-forms root]/log` directory.

## 3.3. Installing AEM Forms on JEE

- 1) Start the installation program:
  - (Windows) Navigate to the `\server\Disk1\InstData\Windows_64\VM` directory on the installation media or folder on your hard disk where you copied the installer. Right-click the `install.exe` file and select Run as administrator.
  - (Non-Windows) Navigate to the appropriate directory, and from a command prompt, type `./install.bin`.
    - (Linux) `/server/Disk1/InstData/Linux/NoVM`
- 2) When prompted, select the language for the installation to use and click **OK**.
- 3) On the Introduction screen, click **Next**.
- 4) If you have a previous version installed on the computer where you are running the installer, the Preparation for Upgrade screen appears.

*NOTE: If you are performing an out-of-place upgrade on a new machine, this screen is not shown.*

  - **Prepare to upgrade existing installation to AEM Forms on JEE:**

*Select this option if you are performing an in-place upgrade, or an out-of-place upgrade on the same computer without changing the operating system. The installation program prepares the data from your existing installation for an upgrade to AEM Forms on JEE.*

- **Install Adobe Experience Manager Forms:** Installs AEM Forms on JEE afresh.

*Select **Next** to continue.*

- 5) On the Choose Install Folder screen, accept the default directory or click **Choose** and navigate to the directory where you intend to install AEM Forms on JEE, and then click **Next**. If you type the name of a directory that does not exist, it is created for you.

*Click **Restore Default Folder** to restore the default directory path.*

**NOTE:** The default installation directory of AEM 6.3 Forms and AEM 6.4 Forms uses an identical name. So, if you are upgrading from AEM 6.3 Forms or AEM 6.4 Forms to AEM 6.5 Forms, rename the directory or install AEM 6.5 Forms at a different location.

- 6) On the Choose Installation Type screen, select **Custom > Manual**, and click **Next**.  
*This screen appears if you are performing an out-of-place upgrade on a new computer.*
- 7) **(Windows only)** On the Manual Installation Options screen, select the target deployment option and click **Next**:
  - **Windows (Local):** Select this option if you are installing and deploying AEM Forms on JEE on the local server.
  - **Staged (Installed on Windows, targeting remote systems):** Select this option if you plan to use Windows as a staging platform for your deployment and then select the target operating system on the remote server. You can select a UNIX operating system as the target for deployment even if you are installing on Windows. (See [Installing on a Windows staging platform for Linux or UNIX.](#))
- 8) Read the AEM Forms on JEE License Agreement, select **I accept** to accept the terms of the license agreement, and then click **Next**. If you do not accept the license agreement, you cannot continue.
- 9) On the Pre-Installation Summary screen, review the details and click **Install**. The installation program displays the progress of the installation.
- 10) Review the Release Notes information and click **Next**.
- 11) Review the details on the Install Complete screen.
- 12) The **Start Configuration Manager** checkbox is selected by default. Click **Done** to run the Configuration Manager.

*If you are upgrading Connectors for ECM, deselect **Start Configuration Manager**, click **Done**, and go to [Preparing the Connectors for ECM for upgrade](#).*

## 3.4. Preparing the Connectors for ECM for upgrade

To upgrade your connectors for ECM to AEM 6.5 Forms from previous versions, configure the application server system after you install AEM 6.5 Forms and before you start Configuration Manager to complete the upgrade process.

There are two ways you can upgrade to AEM 6.5 Forms:



- **In place:** On the existing application server hosting AEM 6.3 Forms or AEM 6.4 Forms.
- **Out of place:** On a newer version of the existing application server or on another physical computer.

## Configure the Connectors for ECM for an out-of-place upgrade

This task is required for an out-of-place upgrade if you are moving to a new computer or a new application server instance.

**NOTE:** If you are not upgrading on a new computer, skip to Step 2.

- 1) **(Out-of-place upgrade to a new computer only)** Install the client for your ECM repository on the forms server that hosts the new application server.
- 2) Perform all settings related to Connectors for ECM (except for administration console settings) on the new application server prior to beginning the upgrade. See *ConfiguringtheConnectorforEMC-Documentum*, *ConfiguringtheConnectorforIBMFileNet* service, or *ConfiguringtheConnectorforIBM-ContentManager* as appropriate for your configuration.
- 3) Navigate to the *[appserver root]/bin* directory on your current LiveCycle or AEM Forms server and copy the *adobe-component-ext.properties* file to the appropriate directory on the target server.
- 4) Restart the application server.

**IMPORTANT:** For Connector for EMC Documentum or Connector for IBM FileNet, the default repository provider must be set to repository provider otherwise the upgrade deployment will fail. If you have configured the ECM repository provider as the default repository provider for either of these connectors, open the administration console and navigate to **Services > LiveCycle [connector type] > Configuration Settings**. Select the **repository provider** option and then click **Save**.

You can now continue to run Configuration Manager to perform the upgrade.

## 3.5. Next steps

You must now configure AEM Forms on JEE for deployment. You can also choose to run Configuration Manager later by using the *ConfigurationManager.bat* or *ConfigurationManager.sh* file located in *[aem-forms root]\configurationManager\bin*.

## 4. Configuring AEM Forms for deployment

### 4.1. Considerations when configuring and deploying AEM Forms on JEE

#### General Considerations

- While configuring, you must provide the location of the JDBC drivers for your database. Oracle and SQL Server drivers are in the `[aem-forms root]/lib/db/[database]` directory. You can download IBM DB2 driver from IBM website. Also, copy the JDBC driver jar files to all nodes while maintaining identical directory structure for all nodes. For the complete list of supported driver versions and download locations, see [Supported Platform Combination](#)
- Temporary directory: It is recommended to use local directory as a temporary directory. The temporary directory should exist on every node of the cluster and the path of the temporary directory must be same for every node in the cluster.
- For upgrades on the same operating system as your existing installation, you can specify the existing GDS location in the Configuration Manager. If you choose to change the directory, copy the contents of the existing GDS directory to the new location before you perform the Configure AEM Forms on JEE (4 of 5) step in Configuration Manager.
- For upgrades on the same operating system as your existing installation, you can specify the existing CRX repository location in Configuration Manager. If you choose to change the directory, copy the contents of the existing CRX repository to the new location before you perform the Configure AEM Forms on JEE (4 of 5) step in Configuration Manager.
- On cluster environments, several steps need to be performed manually in addition to the automatic configuration that Configuration Manager performs.

#### CLI versus GUI versions of Configuration Manager

This section describes the GUI version of Configuration Manager. For instructions about using the command line interface (CLI) version, see [Appendix-Configuration Manager Command LineInterface](#)

Configuration task	Configuration Manager GUI	Configuration Manager CLI	Manual
Configure AEM Forms on JEE	Yes	Yes	No

Configuration task	Configuration Manager GUI	Configuration Manager CLI	Manual
Initialize AEM Forms on JEE database	Yes	Yes	No
Validate AEM Forms on JEE Server connection	Yes	Yes	No
Deploy AEM Forms on JEE components	Yes	Yes	No
Validate AEM Forms on JEE component deployment	Yes	Yes	Yes
Configure AEM Forms on JEE components	Yes	Yes	Yes

## Considerations while configuring AEM Forms on JEE Server Clusters

- It is recommended to have local server fonts and customer fonts directories at the same path on each node in the cluster. Shared fonts directories instead of local fonts directories may cause performance issues.

## Considerations for upgrading repository

Perform the following steps if you had crx-repository installed and configured in the previous version:

- Take backup of the [CRX\_home] folder. If you are using a relational database or MongoDB, take a full backup of the database. .  
**NOTE:** Data Store: If AEM Forms is using TarMK persistence, a data store is created. For example, the turnkey installations have a datastore directory at \Adobe\_Upgrade\Adobe\_Experience\_Manager\_Forms\jboss\bin\crx-quickstart\. Take a backup of the datastore directory also.

## 4.2. Pre-configuration tasks for upgrade

- If you did not start Configuration Manager automatically from the installation program, navigate to the [aem\_forms\_root]/configurationManager/bin directory and run the ConfigurationManager.bat/sh script.
- If prompted, select a language and click **OK**.
- If you are prompted to use existing configuration data, click **OK**.
- On the Welcome screen, click **Next**.
- On the Upgrade Task Selection screen, select the appropriate option to upgrade to AEM 6.5 Forms from your existing installation. Click **Next** to continue.
- On the Modules screen, select the modules you plan to configure and deploy and click **Next**.

**NOTE:** You must install and deploy as many or more modules than those on your existing system.

**NOTE:** Some modules have technical dependencies on other modules for proper configuration and functioning. Configuration Manager displays a dialog and does not allow to proceed further if mutually dependent modules are not selected.

- In AEM Forms, adaptive forms, Correspondence Management, HTML5 Forms, forms portal, HTML Workspace, Process Reporting, and Forms centric workflows on OSGi capabilities use crx-repository. If you plan to use these capabilities, you require crx-repository.
- You do not require crx-repository for AEM Forms Document Security.

- 7) On the Task Selection screen, select the tasks you want to perform and click **Next**.

**NOTE:** *You must select the Initialize AEM Forms Database option when you are upgrading. Also, make sure that you perform all tasks sequentially, without skipping any, to avoid upgrade issues.*

- 8) On the In-place vs Out-of-place Upgrade screen, review the information provided and ensure that all appropriate prerequisites are in place and click **Next**.
- 9) On the Pre-upgrade Steps and Pre-upgrade Steps Contd screens, review the requirements and perform all tasks relevant to your environment and click **Next**.
- 10) **(Out-of-place upgrade on the same computer only)** Shutdown Previous screen indicates that you must shut down your existing application server and click **Next**.

## 4.3. Configuring and deploying AEM Forms on JEE

### Configuring AEM Forms on JEE

- 1) On the Configure Adobe Experience Manager Forms (1 of 5) screen, click **Configure** and click **Next** when done.
- 2) On the Configure Adobe Experience Manager Forms (2 of 5) screen, set the directories that AEM Forms on JEE will use to access fonts and then click **Next**.

**TIP:** Click **Edit configuration** to change any values on this screen. This button is not available when Configuration Manager is run for the first time, but is available on the second and subsequent runs.

- (Optional) To change the default location of the **Adobe server fonts directory**, type the path or browse to the directory.
- To change the default location of the **Customer fonts directory**, click **Browse** or specify a new location for customer fonts.

**NOTE:** Your right to use fonts provided by parties other than Adobe is governed by the license agreements provided to you by such parties with those fonts, and is not covered under your license to use Adobe software. Adobe recommends that you review and ensure that you are in compliance with all applicable non-Adobe license agreements before using non-Adobe fonts with Adobe software, particularly with respect to use of fonts in a server environment.

- (Optional) To change the default location of the **System fonts directory**, type the path or browse to the directory. To add more directories to the list, click **Add**.

- 3) Click **Browse** on the Configure Adobe Experience Manager forms (3 of 5) screen to specify the **Location of the temporary directory**.

**NOTE:** Ensure that the temporary directory is located on the local file system.

**NOTE:** If you do not specify the temporary directory, the default system-configured temp location is used. The temporary directory must exist and the path to the temporary directory must be the same on every node in the cluster.

- 4) On the Configure Adobe Experience Manager Forms (4 of 5) screen, click **Browse** to specify the path for the Global Document Storage (GDS) directory.

**NOTE:** You must point to the existing GDS directory or copy its contents to the newly specified location.

- 5) On the Configure Persistent Document Storage (5 of 5) screen, select the option for persistent document storage in addition to the GDS directory. Select one of the following:

- **Use GDS:** Use the file system-based GDS for all persistent document storage. This option provides the best performance, and a single location for GDS.
- **Use database:** Use the AEM Forms on JEE database for storing persistent documents and long-lived artifacts. However, the file-system based GDS is also required. Using the database simplifies backup and restore procedures.

Click **Configure** to configure the EARs with this directory information. After the configuration is complete, click **Next**.

## Configuring your database

- 1) On the Adobe Experience Manager Forms Database screen, provide information about the instance of AEM Forms on JEE database, so that Configuration Manager can connect to it.

Click **Verify Connection** to ensure that the information is valid and Configuration Manager can connect to the database, and click **Next** to continue.

**NOTE:** The above information applies to the database AEM Forms on JEE will connect to. This can be either your existing database (if supported) from previous version or a new database that you have configured and migrated the existing data to. (See [Preparing to Upgrade to AEM forms on JEE](#)).

**NOTE:** The above information applies to the database AEM Forms on JEE will connect to. This is a new database that you have configured and migrated the existing LiveCycle data to.

**NOTE:** Ensure that the JDBC driver points to the correct database driver located inside `[aem-forms root]/lib/db/<database>` directory.

## Configure CRX

- 1) The CRX Configuration screen allows you to configure the CRX repository and install it into the `adobe-livecycle-cq-author.ear` EAR file.
- 2) Specify the path to the repository. The default location is `[aem-forms root]/crx-repository`.

**NOTE:** Ensure that the CRX repository path does not contain spaces and the content repository is available on all the nodes in the cluster. After the configuration is complete, copy the content

repository from local node to all the nodes on the same location (as specified on the CRX configuration screen). Copy the datastore folder (backed up during preparing system for upgrade) to all the nodes on the same location, also.

- 3) If you are upgrading your existing repository, specify the path of the crx-repository copied from the previous version.
- 4) Select the repository type, as appropriate, and keep a note of the following points:
  - CRX3 TAR is not supported in clustered deployments.
  - If selecting CRX3 Mongo DB, specify the Mongo database name and URL to the database. The format of the URL is: `mongodb://<HOST>:<Port>`.  
*HOST: IP address of the machine running MongoDB.*  
*Port: Port number used for the MongoDB. The default port number is 27017.*
  - Selecting this option sets the CRX repository persistence to RDB MK (document MK).

**NOTE:** If you have already upgraded to AEM 6.5 forms and running configuration manager to add or remove modules, ensure that the CRX repository type option matches the option you selected while upgrading.

- 5) Click **Configure** to create the required repository files at the specified location.

Click **Next** to continue.

### (Remote host only) CRX Configuration Summary

- 1) For a remote deployment, copy the content from the `[aem-forms root]/configurationManager/export/crx-quickstart/` directory to the location on the remote host you specified on the CRX Configuration screen.

### Configuring Acrobat for PDF Generator

- 1) **(Windows only)** On the Configure Acrobat For PDF Generator screen, click **Configure** to run the script that configures Adobe Acrobat and required environment settings. Click **Next** when complete.

**NOTE:** This screen performs the desired configuration only when Configuration Manager is running locally. You must have Adobe Acrobat DC Pro already installed or this step will fail.

## Configuration Summary

- 1) On the Configure Adobe Experience Manager forms Summary screen, click **Next**. Configured archives are placed in the `[aem-forms root]/configurationManager/export` directory.

## Deploying Adobe Experience Manager Forms EARs

- 1) Without exiting Configuration Manager, manually deploy the Adobe Experience Manager Forms EAR files to JBoss by copying the following files from the `[aem-forms root]/configurationManager/export` directory to the specified directories below:
  - `adobe-lifecycle-native-jboss-[OS].ear`
  - `adobe-lifecycle-jboss.ear`
  - `adobe-workspace-client.ear` (forms workflow only)
  - (optional) `adobe-assembler-ivs.ear`
  - (optional) `adobe-forms-ivs-jboss.ear`
  - (optional) `adobe-output-ivs-jboss.ear`
  - (JBoss, single server)  
`[appserver root]/standalone/deployments`

*For clustered environments, perform the following steps to manually deploy EAR files from application server management Console:*

- a) Shut down all nodes except the master node.
- b) Copy the configured EAR files from `[aem_root]\configurationManager\export` to a local directory on the server.
- c) Open the management console, click Deployments. The default URL is `http://<Ip_Address>:9990/console/` and the default port is 9990. A Content Repository window opens. It has Add, Remove, Assign, and Replace options.
- d) To deploy EAR files:
  - i) Click Add, click Browse, and navigate to the local directory that contains EAR files. Select an EAR file to add, click Next, and then click Save. The added EAR file appears in the Content Repository window. Repeat the step for all EAR files.
  - ii) On the Content Repository page, select an EAR files one-by-one. On the select server groups, select the assign option, leave the Enable <ear file> option checked, and click Save. The value in the assignment column changes from 0 to 1. Repeat the step for all EAR files.
  - iii) After all the EAR files are deployed, return to the configuration management window, and continue from the Initializing Adobe Experience Manager Forms database section.

*You can optionally deploy the Forms Standard, Output, Mobile Forms, and Assembler IVS EARs.*

**NOTE:** The `adobe-lifecycle-cq-author.ear` file is manually deployed in later stage after migrating CRX repository to OAK.

**IMPORTANT:** Deploying IVS EAR files to a production environment is not recommended.

**NOTE:** If you encounter the following error message, ignore it and continue with configuring AEM Forms.

```
ERROR [stderr] (http-/0.0.0.0:8080-4)
com.adobe.idp.common.errors.exception.IDPException|
[com.adobe.idp.storeprovider.jdbc.DBStatement] errorCode:12552
errorCodeHEX:0x3108
```

## Initializing Adobe Experience Manager Forms database

- 1) On the Adobe Experience Manager forms Database Initialization screen, verify that the hostname and port number for your application server is correct and click **Initialize**. The database initialization task creates tables in the database, adds default data to the tables, and creates basic roles in the database. When the initialization is completed successfully, click **Next**.

*Restart the application server manually if prompted.*

- 2) On the Adobe Experience Manager forms Information screen, specify **Adobe Experience Manager forms User ID** and **Password** whose default values are *administrator* and *password*, respectively.

*As you are upgrading to Adobe Experience Manager Forms, specify the administrator password of your previous AEM Forms or LiveCycle installation.*

*Click **Verify Server Connection**, and when complete, click **Next**.*

**NOTE:** If the server verification fails, restart the server but only when error.log gets stable and `http://[server]:[port] /lc` is accessible. If the verification fails yet again, restart the server again.

*If the connection test passes but deployment or validation fails in the next few steps, troubleshoot the connectivity issues.*

## Session ID Migration Errors

View and fix the errors that were encountered while migrating session IDs from your old LiveCycle instance and click **Next**. It is important to fix these errors; otherwise, you may encounter failed workflow invocations post upgrade.

## Deploying Adobe Experience Manager Forms components

- 1) On the Adobe Experience Manager Forms Component Deployment screen, click **Deploy**. The components that are deployed at this time are Java archive files that plug into the AEM Forms service container for the purposes of deploying, orchestrating, and executing services. When the deployment completes successfully, click **Next**.
- 2) On the Adobe Experience Manager forms Component Deployment Validation screen, click **Validate**. When the validation completes successfully, click **Next**.



## Configuring Adobe Experience Manager Forms components

- 1) On the Configure Adobe Experience Manager forms Components screen, select the tasks to run using Configuration Manager and click **Next**.  
**NOTE: (Upgrade only)** If you are upgrading any Connectors for the ECM module, do not select them on this screen. Only include them if you are licensing them for the first time in AEM Forms and proceed with the following steps, as appropriate.

### Connector for EMC Documentum

**NOTE:** In case of remote Adobe Experience Manager Forms deployment, you cannot configure the Connector for EMC Documentum using Configuration Manager.

- 1) On the Specify Client for EMC Documentum screen, select **Configure Connector for EMC Documentum Content Server**, and specify the following settings, click **Verify**, and when complete, click **Next** to continue.
  - **Choose EMC Documentum Client Version:** Select the client version to use with the EMC Documentum Content Server.
  - **EMC Documentum Client Installation Directory Path:** Click **Browse** to select the directory path.
- 2) On the Specify EMC Documentum Content Server Settings screen, specify the EMC Documentum Server details, and click **Next**. Press F1 for information about the details.
- 3) On the Configure Connector for EMC Documentum screen, click **Configure Documentum Connector**. When completed, click **Next**.
- 4) On the Required Manual Configurations for Connector for EMC Documentum screen, review and perform the manual steps listed and click **Next**.

### Connector for IBM Content Manager

**NOTE:** In case of remote Adobe Experience Manager Forms deployment, you cannot configure the Connector for IBM Content Manager using Configuration Manager.

- 1) On the Specify Client for IBM Content Manager screen, select **Configure Connector for IBM Content Manager**, and specify a value for IBM Content Manager Client Installation Directory Path. Click **Verify** and when complete, click **Next** to continue.
- 2) On the Specify IBM Content Manager Server Settings screen, specify the details of the IBM Content Manager Server, and click **Next**.
- 3) On the Configure Connector for IBM Content Manager screen, click **Configure IBM Content Manager Connector**. When complete, click **Next**.
- 4) On the Required Manual Configurations for Connector for IBM Content Manager screen, review and perform the manual steps listed and click **Next**.

## Connector for IBM FileNet

**NOTE:** In case of a remote Adobe Experience Manager Forms deployment, you cannot configure the Connector for IBM FileNet using Configuration Manager.

**NOTE:** Make sure your ECM is upgraded according to [supported versions](#).

- 1) On the Specify Client for IBM FileNet screen, select **Configure Connector for IBM FileNet Content Manager**, and specify the following.
  - **Choose IBM FileNet Client Version:** Select the client version you want to use with the IBM FileNet Content Server.
  - **IBM FileNet Client Installation Directory Path:** Click **Browse** to select the directory path.  
**NOTE:** The validation of IBM FileNet may fail if there are special characters, such as hyphen (-), underscore (\_), comma (,), or dot (.) in the directory name containing the IBM FileNet client.  
*Click **Verify**, and when complete, click **Next** to continue.*
- 2) On the Specify IBM FileNet Content Server Settings screen, specify the required details, and click **Next**.
- 3) On the Specify Client for IBM FileNet Process Engine screen, specify the required details, and click **Verify**. When complete, click **Next**.
- 4) On the Specify IBM FileNet Process Engine Server Settings screen, specify the required details and click **Next**.
- 5) On the Configure Connector for IBM FileNet screen, click **Configure FileNet Connector**. When complete, click **Next**.
- 6) On the Required Manual Configurations for Connector for IBM FileNet screen, review and perform the manual steps listed and click **Next**.

## Connector for Microsoft SharePoint

**NOTE:** In case of remote Adobe Experience Manager Forms deployment, you cannot configure the Connector for Microsoft SharePoint using Configuration Manager.

**NOTE:** You can skip this step if you want to configure the Connector for Microsoft SharePoint later using Administration Console.

On the Configure Adobe Experience Manager forms Connector for Microsoft SharePoint screen, do one of the following tasks:

- De-select the **Configure Adobe Experience Manager forms Connector for Microsoft SharePoint** option to manually configure Microsoft Sharepoint later and click **Next**.
- Leave the **Configure Adobe Experience Manager forms Connector for Microsoft SharePoint** option selected. Specify the required values and click Configure SharePoint Connector. When complete, click **Next**.

## Configuring AEM Forms Server for native file conversions

- 1) **(PDF Generator only)** On the **Admin user credentials for native PDF conversions** screen, specify the user name and password of a user with administrative privileges on the server computer and click **Add user**.

**NOTE:** You must add at least one administrative user for Windows Server. On Windows Server, User Account Control (UAC) must be disabled for the users you add. To disable UAC, click **Control Panel > User Accounts > Turn User Account Control on or off** and de-select Use User Account Control (UAC) to help protect your computer, and click **OK**. Restart the computer to apply these changes.

## System readiness test for PDF Generator

- 1) On the **Document Services PDF Generator System Readiness Test** screen, click **Start** to validate if the system has been appropriately configured for PDF Generator. Review the System Readiness Tool Report and click **Next**. Note that the system readiness test fails if AEM Forms on JEE is deployed on a remote machine.

## Configuring Acrobat Reader DC extensions

- 1) On the Acrobat Reader DC extensions Credential Configuration screen, specify the details associated with the Acrobat Reader DC extensions credential that activates the module services:

**NOTE:** You can skip this step at this time by selecting **Configure later using administration console**. You can configure the Acrobat Reader DC extensions credential by using Administration Console after you complete the deployment. In the administration console, click **Home > Settings > Trust Store Management > Local Credentials**.

Click **Configure** and click **Next**.

## Summary, and Next Steps

- 1) Server restart required screen requires you to restart your application server for some configurations to take effect. When finished, click **Next**.  
**NOTE:** You will see a message on the screen to restart the server. However, do not immediately restart. Ensure that `[crx-repository]/logs/error.log` is stable and all bundles (except signatures) are in active mode before you restart the server.
- 2) Review the Configuration Manager task summary list and choose appropriate options:
  - Select Launch Next Steps to view information about AEM Forms on JEE users and administrative interfaces.

## 5. Upgrade CRX repository

You can upgrade and move the content of CRX repository configured for a previous release of AEM 6.3 Forms or AEM 6.4 Forms.

### 5.1. Upgrade the crx-repository

- 1) (For TarMK only) Copy the datastore folder backed-up before starting the upgrade process to the [AEM Forms Installation]\[application-server]\bin\crx-quickstart folder.
- 2) Copy all the packages (zip files) from [AEM-Installation-Directory]\configurationManager\export\crx-quickstart\install to [AEM-Installation-Directory]\crx-repository\install directory.
- 3) Navigate to the [AEM\_forms root]\configurationManager\export folder and locate the adobe-live-cycle-cq-author.ear file.
- 4) Deploy the adobe-livecycle-cq-author.ear file to the application server.
- 5) Wait for EAR to deploy successfully.
- 6) Once you got EAR deployment confirmation notice some files modified in [AEM-Installation-Directory]\crx-repository\launchpad folder and no activities in error log.
- 7) Shut down the AEM Forms server.
- 8) Start the AEM Forms server.
- 9) You may see some dependencies error in logs while server is restarting but those can be ignored, that is mostly due to the order of package installations.  
**NOTE:** Wait for logs to be stable. A few packages might remain in the installed state. You can safely ignore the state of these packages.
- 10) Re-start the AEM Forms server.
- 11) You will find all the bundles in active state. The crx-repository is upgraded.

## 6. Post-deployment tasks

### 6.1. General tasks

As part of upgrade preparation, we put the server in maintenance mode before starting the upgrade process. Hence, we must disable the maintenance mode of the upgraded AEM Forms server before performing any other post-deployment tasks.

#### Check whether AEM Forms on JEE is running in maintenance mode

In a web browser, enter:

```
http://[hostname]:[port]/dsc/servlet/DSCStartupServlet?maintenanceMode=is  
Paused&user=[administrator username]&password=[password]
```

The status is displayed in the browser window. A "true" status indicates that the server is running in maintenance mode and a "false" status indicates that the server is not in maintenance mode.

**NOTE:** It returns "true" only if you had put the previous version in maintenance mode before upgrade.

#### Turn off maintenance mode

**NOTE:** Applicable only if you had put the previous version in maintenance mode before upgrade.

In a web browser, enter:

```
http://[hostname]:[port]/dsc/servlet/DSCStartupServlet?maintenanceMode=re  
sume&user=[administrator username]&password=[password]
```

A "now running" message is displayed in the browser window.

#### Configure the serialization agent

AEM Forms requires the `sun.util.calendar` package to be whitelisted. Perform the following steps to add the package to the whitelist:

- 1) Open the Web Console in a browser window. The default URL is `http://[server]:[port]/system/console/configMgr`.
- 2) Search and open Deserialization Firewall Configuration.
- 3) In the whitelist field, add the `sun.util.calendar` package and click Save.

## Setting the correct date, time, and time zone

Setting the correct date, time, and time zone on all servers connected to your AEM Forms on JEE environment will ensure that time-dependent modules, such as Digital Signatures and Acrobat Reader DC extensions function correctly. For example, if a signature appears to have been created in the future, it will not validate.

Servers that require synchronization are database servers, LDAP servers, HTTP servers, and J2EE servers.

## Perform a system image backup

After AEM forms on JEE is installed and deployed into production areas and before the system is live, it is recommended to perform a system image backup of the servers on which AEM Forms on JEE is implemented. Also take backup of CRX repository.

AEM Forms on JEE database, GDS directory, content storage root directory (deprecated), and application servers must be included in the backup. This is a complete system backup that you can use to restore the contents of your computer if your hard drive or entire computer stops working. See the AEM Forms JEE Backup and Recovery topic in [administration help](#).

## Configure URL and port number for client SDK

Perform the following section, only if you have installed CRX repository:

The default URL of AEM Forms client SDK (CSDK) is `http://localhost:8080`. Change the default URL to the current URL of your AEM Forms environment. The current URL is required to enable and configure authentication between AEM configuration manager and CRX-repository:

- 1) Open the configuration manager URL, `http://<server>:<port>/lc/system/console/configMgr`, in a browser window.
- 2) Search and open the Adobe LiveCycle Client SDK Configuration service for editing.
- 3) In the Server URL field, specify current URL of your AEM Forms environment, and click Save.

## Restart the application server

When you first deploy AEM Forms on JEE, the server is in a deployment mode in which most modules are in memory. As a result, the memory consumption is high and the server is not in typical production state. You must restart the application server to get the server back into a clean state.

**NOTE:** When you upgrade the AEM Forms on JEE Server, ensure that you delete the `[Jboss_root]\stand-alone\tmp` folder on single server installation or `[Jboss_root]\domain\servers\<server name>\tmp` folders on cluster-based installations before restarting the application server.

## jQuery upgrade for mobile and adaptive forms

In AEM 6.5 Forms, version of jQuery is updated to 3.2.1 and jQuery UI version is updated to 1.12.1. AEM Form uses JQuery in noConflict mode. So, if you are using any other jQuery version, no issues are displayed while performing an upgrade. However, when you upgrade to AEM 6.5 Forms:

- Ensure that your custom components, if any, are compatible with supported jQuery versions.
- Remove unsupported APIs from the custom components. See [upgrade guide](#)
- for the list of removed APIs. For example, support for the `load()`, `unload()`, and `.error()` APIs is removed. Use the `.on()` method in place of aforementioned APIs. For example, change `$("img").load(fn)` to `$("img").on("load", fn)`.

## Verify the deployment

You can verify the deployment by logging in to Administration Console. If you log in successfully, it means AEM Forms on JEE is running on the application server and the default user is created in the database. To verify the CRX repository deployment, access the CRX welcome page.

You can review the application server log files to ensure that components were deployed correctly or to determine the cause of any deployment issues you may encounter.

## Accessing administration console

If you have upgraded, the username and password remain the same as they were on the previous installation.

- 1) Type the following URL in a web browser:  
`http://[hostname]:[port]/adminui`  
*For example: `http://localhost:8080/adminui`*
- 2) If you have upgraded to AEM Forms on JEE, enter the same administrator username and password as that of your previous installation. In case of a fresh installation, enter the default username and password.
- 3) After you log in, click **Services** to access the service administration pages or click **Settings** to access the pages on which you can administer settings for different modules.

## Change the default password of AEM forms on JEE Administrator

AEM Forms on JEE creates one or more default users during the installation. The password for these users is in the product documentation and is publicly available. You must change this default password, depending on your security requirements.

The AEM Forms on JEE administrator user password is set to “password” by default. You must change it in Administration console > Settings > User Management > Users and Groups.

- 1) Log into the Administration console using administrator/password credentials.
- 2) Go to **Settings > User Management > Users and Groups**.
- 3) Search for user **Administrator**.
- 4) Click the **Administrator** user.

- 5) In the Login Settings section, Click **Change Password**.
- 6) Specify a new password and click **Save**.
- 7) Re-login using the changed password to verify.

### Accessing OSGi Management Console

OSGi console provides a way to manage OSGi bundles and services configurations. To, access the OSGi Management console:

- 1) Type the following URL in a web browser:  
`http://[hostname]:[port]/lc/system/console`
- 2) Enter the CRX Administrator username and password. The default username and password for logging in is admin and admin (same as CRX Administrator).  
**NOTE:** You cannot log into OSGi Management Console using the credentials of AEM Forms on JEE Administrator or AEM Super Administrator.
- 3) After you log in, you can access various components, services, bundles, and other configurations.

### View the log files

Events, such as run-time or startup errors, are recorded to the application server log files. If you have problems deploying to the application server, you can use the log files to find the problem. You can open the log files using any text editor.

Log files for Adobe-preconfigured JBoss are located at:

- **(Standalone)** `[appserver root]/standalone/log` directory
- **(Cluster)** `[appserver root]\domain\servers\server-one\log` directory

The log files are:

- `server.log`

Following CRX log files are located at `[CRX_home]/logs`

- `error.log`
- `audit.log`
- `access.log`
- `request.log`
- `update.log`

### Configure Author and Publish instance

Perform the following tasks to configure Author and Publish instance only if you have installed and configured the CRX repository:



## Configure the Author instance

Author instance is embedded within the AEM Forms on JEE server. It implies that you do not need to make any configuration updates to the Author instance. The instance inherits all configuration settings from the AEM Forms on JEE instance.

## Configure the Publish instance

You must run separate author and publish instances. You can configure the instances on different machines.

**NOTE:** The cluster topology is not recommended for the publish instance. Use a single publish instance or configure a farm of publish instances.

**NOTE:** Use CQ standalone jar for publish instance.

**NOTE:** By default, the publish instance is configured to run the mode similar to corresponding author instance. The mode can be TarMK, MongoMK, or RDBMK. Run the publish instance on TarMK mode.

## Communicating between the Author and Publish instances

Enable two-way communication between Author and Publish instances:

### *Define Publish instance URL*

- 1) Go to `http://<authorHost>:<authorPort>/lc/etc/replication/agents.author/publish.html`.
- 2) Click **Edit**. The Agent Settings dialog opens.
- 3) Click the **Transport** tab and specify the URL to the publish server in the URI field.  
`http://<publishHost>:<publishPort>/lc/bin/receive?sling:authRequestLogin=1`

**NOTE:** If there are multiple publish instances managed by a Load Balancer, specify the URL to the load balancer in the URI field.

- 4) Click **OK**.

**NOTE:** For author clusters, these steps need to be performed on one author instance (preferably a master instance).

### *Define publish instance URL for ActivationManagerImpl*

- 1) Go to `http://<authorHost>:<authorPort>/lc/system/console/configMgr`. The default username and password for logging in are admin and admin (same as CRX Administrator).
- 2) Find and click the Edit icon next to the `com.adobe.livecycle.content.activate.impl.ActivationManagerImpl.name` setting.
- 3) In the ActivationManager Publish URL field, specify the URL for the corresponding publish instance.
- 4) Click **Save**.

### *Configure reverse replication queue*

- 1) Go to `http://<authorHost>:<authorPort>/lc/etc/replication/agents.author/publish_reverse.html`.
- 2) Click **Edit**. The Agent Settings dialog opens.

- 3) Click the **Transport** tab and specify the URL to the corresponding publish server in the URI field.  
**NOTE:** If there are multiple publish instances managed by a Load Balancer, specify the URL to the load balancer in the URI field.
- 4) Click **OK**.

#### *Define author instance URL*

- 1) Go to `http://<publishHost>:<publishPort>/lc/system/console/configMgr`. The default username and password for logging in are admin and admin (same as CRX Administrator).
- 2) Find and click the Edit icon next to the `com.adobe.livecycle.content.activate.impl.VersionRestoreManagerImpl.name` setting.
- 3) In the VersionRestoreManager Author URL field, specify the URL for the corresponding author instance.  
**NOTE:** If there are multiple author instances managed by a Load Balancer, specify the URL to the load balancer in the VersionRestoreManager Author URL field.
- 4) Click **Save**.

#### **Configure IPv6 implementation**

**NOTE:** Perform these steps only if the machine/server is using an IPv6 address.

To map the IPv6 address to a hostname on the server and client machines:

- 1) Navigate to the `C:\Windows\System32\drivers\etc` directory.
- 2) Open the `hosts` file in a text editor.
- 3) Add a mapping for the IPv6 address to a host name. For example:  
`2001:1890:110b:712b:d1d:9c99:37ef:7281 <ipv6_hostname>`
- 4) Save and close the file.

Ensure that you use the mapped host name instead of the IPv6 address to access the machine.

#### **Install Japanese fonts for Adobe Reader**

If your document fragments use Japanese fonts, you must install the Japanese Language Support Package for Adobe Reader. Otherwise, your letters and forms will not render and function properly. For installing language packs, visit the downloads page for Adobe Reader.

#### **Accessing module web applications**

After AEM forms on JEE is deployed, you can access the web applications that are associated with the following modules:

- Acrobat Reader DC extensions
- Workspace
- HTML Workspace
- User management

- Correspondence management
- PDF Generator web application
- PDF Generator
- Document Security

After accessing the web applications by using the default administrator permissions to ensure that they are accessible, you can create additional users and roles so that others can log in and use the applications. See [administration help](#)

### Access the Acrobat Reader DC extensions web application

**NOTE:** You must apply a Acrobat Reader DC extensions credential and apply the user roles for a new user. See “Configuring credentials for use with Acrobat Reader DC extensions” in administration help.

- 1) Open a web browser and enter this URL:

`http://[hostname]:[port]/ReaderExtensions`

- 2) Log in using the username and password for AEM Forms on JEE.

**NOTE:** You must have administrator or superuser privileges to log in. To allow other users to access the Reader Extensions web application, you must create the users in User Management and grant them the Acrobat Reader DC extensions Web Application role.

### Enable redirection for forms manager and forms portal URLs used in LiveCycle

After upgrading to AEM Forms from LiveCycle, the forms manger and forms portal URLs available in LiveCycle stop working. Perform the following steps to install additional packages and enable redirection:

- 1) Open the Package Manager. The default URL is `http:[server]:[port]/lc/crx/packmgr`.
- 2) Click Add Package, navigate to the `[aem-forms_root]/deploy/crx` folder.
- 3) Select and upload the following packages:
  - adobe-lc-formsmanager-upgrade-pkg.zip
  - adobe-aemds-formsportal-upgrade-pkg.zip
- 4) Click Install on each package.

### Access HTML Workspace

- 1) Open a web browser and enter this URL:

`http://[hostname]:[port]/lc/ws`

- 2) Log in using the username and password for AEM Forms on JEE.

**NOTE:** AEM Forms does not support Flex Workspace. Adobe recommends Flex Workspace users to migrate to AEM Forms Workspace. AEM Forms Workspace is built on HTML5 and does not require Adobe Flash. Some of the features of Flex Workspace are not available in AEM Forms workspace including: messages and notification, welcome page, approval container, and option to manage column headings. For details, see [Migrating from Flex Workspace to AEM Forms Workspace](#)

### Access forms manager

- 1) Open a web browser and enter this URL:  
`http://[hostname]:[port]/lc/fm`
- 2) Log in using the username and password for AEM Forms on JEE.

### Access PDF Generator Web Application

- 1) Open a web browser and enter this URL:  
`http://[hostname]:[port]/pdfgui`
- 2) Log in using the username and password for AEM Forms on JEE.

### Access Document Security

You must create a user with the Document Security End User role in User Management and log in to the Document Security administrator or end-user applications by using the login information associated with that user.

**NOTE:** The default administrator user cannot access the Document Security end-user web application but you can add the appropriate role to its profile. You can create a new user or modify an existing user through administration console.

#### *Access the Document Security end-user web application*

- 1) Open a web browser and enter this URL:  
`http://[hostname]:[port]/edc`

#### *Access the Document Security administration web application*

- 1) Open a web browser and enter this URL:  
`http://[hostname]:[port]/adminui`
- 2) Click **Services > document security**.  
*For information about setting up users and roles, see Administration Help.*

#### *Assign the Document Security End User role*

- 1) Log in to administration console. (See [Accessingadministrationconsole](#).)
- 2) Click **Settings > User Management > Users and Groups**.
- 3) In the **Find** box, type `all` and, in the **In** list, select **Groups**.
- 4) Click **Find** and, for the required domains, click **All Principals** in the list that appears.
- 5) Click the **Role Assignments** tab and click **Find Roles**.
- 6) In the list of roles, select the check box next to **Rights Management End User**.
- 7) Click **OK** and then click **Save**.

## Accessing User Management

By using User Management, administrators can maintain a database of all users and groups, synchronized with one or more third-party user directories. User Management provides authentication, authorization, and user management for AEM Forms on JEE modules, including Acrobat Reader DC extensions, Workspace, Document Security, forms workflow, Forms Standard, and PDF Generator.

- 1) Log in to the administration console.
- 2) On the home page, click **Settings > User Management**.

**NOTE:** For information about configuring users with User Management, click **User Management Help** in the upper-right corner of the User Management page.

## Upgrading to Workbench

Once you have completed your AEM Forms on JEE server upgrade and verified that it is working properly, install the new version of Workbench in order to continue creating and modifying your AEM Forms on JEE applications.

## Migrate adaptive forms and Correspondence Management assets

The migration utility makes assets of earlier versions compatible with AEM 6.5 forms. You can download the utility from AEM package share. For detailed steps, see [http://adobe.com/go/learn\\_aemforms\\_migrate\\_assets\\_65](http://adobe.com/go/learn_aemforms_migrate_assets_65)

## Remove Adobe Correspondence Management Utilities Bundle

AEM Forms shipped Correspondence Management Utilities Bundle with previous releases of AEM Forms. The bundle is not required on AEM 6.5 Forms setup. Perform the following steps to uninstall the bundle:

- 1) Open the `http://[server]:[port]/lc/system/console/bundles` URL in a browser window.
- 2) Search and open the Adobe Correspondence Management Utilities Bundle.
- 3) Click the uninstall icon to remove the bundle.

## Reconfigure Adobe Sign

If you had Adobe Sign configured in the previous version of AEM Forms, then reconfigure Adobe Sign from AEM Cloud services. For more details, see [http://adobe.com/go/learn\\_aemforms\\_integrateadobe-sign\\_65](http://adobe.com/go/learn_aemforms_integrateadobe-sign_65).

## Reconfigure analytics and reports

In AEM 6.5 Forms, traffic variable for source and success event for impression are not available. So, when you upgrade to AEM 6.5 Forms, AEM Forms stops sending data to Adobe Analytics server and analytics reports for adaptive forms and adaptive document are not available. Moreover, AEM 6.5 Forms introduces traffic variable for the version of form analytics and success event for the amount of time spent on

a field. So, reconfigure analytics and reports for your AEM Forms environment. For detailed steps, see [http://adobe.com/go/learn\\_aemforms\\_configureanalytics\\_65](http://adobe.com/go/learn_aemforms_configureanalytics_65).

Methods to calculate average fill time for forms and average read time for adaptive documents have changed. So, when you upgrade to AEM 6.5 forms, the old data from previous AEM Forms release for these metrics is available only in Adobe Analytics. It is not visible in AEM Forms analytics reports. For these metrics, AEM Forms analytics reports display data which is captured after performing the upgrade.

## Disable Draft and Submission workflows

If you are using AEM Forms with JBoss application server and database is MongoDB, disable the Draft and Submission workflows on a publish nodes of the cluster. Perform the following steps to disable the workflows:

- 1) Open the following URL: [http://\[host\]:\[port\]/lc/libs/cq/workflow/content/console.html](http://[host]:[port]/lc/libs/cq/workflow/content/console.html)
- 2) Open the Launchers tab. A list of launchers is displayed
- 3) Double-click the launcher with description "Replicate all the drafts/submissions that are just modified".
- 4) In the Properties window, set the value of the Activate field to Disabled, and click OK.
- 5) Repeat step 3 and 4 for the launcher with description "Replicate all the drafts/submissions that are just created".

Now, the Draft and Submission workflows are disabled.

## Configure the ContentRepositoryConnector service

By default, the ContentRepositoryConnector service is configured to use URL <http://localhost:8080/lc/crx/server/>. Perform the following steps to configure the service for your environment:

- 1) Log in to AEM Forms Admin UI using credentials administrator/password. The default URL of Admin UI is [http://\[IP\]:\[Port\]/adminui](http://[IP]:[Port]/adminui).
- 2) Navigate to Services > Application and Services > Service Management.
- 3) Search and open the ContentRepositoryConnector service for editing.
- 4) Open the Configuration tab and replace the default URL in the Experience Management Server field with the URL of your environment.

### IP

IP address of the machine on which application server is running.

### Port

Port number which AEM Forms is using. The default port number for JBoss and WebSphere are 8080 and 9080, respectively.

## Configure fonts manager service

- 1) Go to `http://[hostname]:[port]/system/console/configMgr`.
- 2) Click the CQ-DAM-Handler-Gibson Font Manager Service to open in edit mode.
- 3) Specify paths to the directories for system fonts, Adobe server fonts, and customer fonts in the respective fields. Click Save.

**NOTE:** Your right to use fonts provided by parties other than Adobe is governed by the license agreements provided to you by such parties with those fonts, and is not covered under your license to use Adobe software. Adobe recommends that you review and ensure that you are in compliance with all applicable non-Adobe license agreements before using non-Adobe fonts with Adobe software, particularly with respect to use of fonts in a server environment.

- 4) Restart the AEM Forms server.

## 6.2. Configure Author and Publish instance

Perform the following tasks to configure Author and Publish instance only if you have installed and configured the CRX repository:

### Configure the Author instance

Author instance is embedded within the AEM Forms on JEE server. It implies that you do not need to make any configuration updates to the Author instance. The instance inherits all configuration settings from the AEM Forms on JEE instance.

### Configure the Publish instance

You must run separate author and publish instances. You can configure the instances on different machines.

**NOTE:** The cluster topology is not recommended for the publish instance. Use a single publish instance or configure a farm of publish instances.

**NOTE:** Use CQ standalone jar for publish instance.

**NOTE:** By default, the publish instance is configured to run the mode similar to corresponding author instance. The mode can be TarMK, MongoMK, or RDBMK. Run the publish instance on TarMK mode.

### Communicating between the Author and Publish instances

Enable two-way communication between Author and Publish instances:

#### Define Publish instance URL

- 1) Go to `http://<authorHost>:<authorPort>/lc/etc/replication/agents.author/publish.html`.
- 2) Click **Edit**. The Agent Settings dialog opens.

- 3) Click the **Transport** tab and specify the URL to the publish server in the URI field.

*http://<publishHost>:<publishPort>/lc/bin/receive?sling:authRequestLogin=1*

**NOTE:** If there are multiple publish instances managed by a Load Balancer, specify the URL to the load balancer in the URI field.

- 4) Click **OK**.

**NOTE:** For author clusters, these steps need to be performed on one author instance (preferably a master instance).

### Define publish instance URL for `ActivationManagerImpl`

- 1) Go to `http://<authorHost>:<authorPort>/lc/system/console/configMgr`. The default username and password for logging in are admin and admin (same as CRX Administrator).
- 2) Find and click the Edit icon next to the `com.adobe.livecycle.content.activate.impl.ActivationManagerImpl.name` setting.
- 3) In the ActivationManager Publish URL field, specify the URL for the corresponding publish instance.
- 4) Click **Save**.

### Configure reverse replication queue

- 1) Go to `http://<authorHost>:<authorPort>/lc/etc/replication/agents.author/publish_reverse.html`.
- 2) Click **Edit**. The Agent Settings dialog opens.
- 3) Click the **Transport** tab and specify the URL to the corresponding publish server in the URI field.  
**NOTE:** If there are multiple publish instances managed by a Load Balancer, specify the URL to the load balancer in the URI field.
- 4) Click **OK**.

### Define author instance URL

- 1) Go to `http://<publishHost>:<publishPort>/lc/system/console/configMgr`. The default username and password for logging in are admin and admin (same as CRX Administrator).
- 2) Find and click the Edit icon next to the `com.adobe.livecycle.content.activate.impl.VersionRestoreManagerImpl.name` setting.
- 3) In the VersionRestoreManager Author URL field, specify the URL for the corresponding author instance.  
**NOTE:** If there are multiple author instances managed by a Load Balancer, specify the URL to the load balancer in the VersionRestoreManager Author URL field.
- 4) Click **Save**.

### Configure IPv6 implementation

**NOTE:** Perform these steps only if the machine/server is using an IPv6 address.



To map the IPv6 address to a hostname on the server and client machines:

- 1) Navigate to the C:\Windows\System32\drivers\etc directory.
- 2) Open the `hosts` file in a text editor.
- 3) Add a mapping for the IPv6 address to a host name. For example:  
`2001:1890:110b:712b:d1d:9c99:37ef:7281 <ipv6_hostname>`
- 4) Save and close the file.

Ensure that you use the mapped host name instead of the IPv6 address to access the machine.

## Install Japanese fonts for Adobe Reader

If your document fragments use Japanese fonts, you must install the Japanese Language Support Package for Adobe Reader. Otherwise, your letters and forms will not render and function properly. For installing language packs, visit the downloads page for Adobe Reader.

## 6.3. Configuring PDF Generator

If you installed PDF Generator, complete the following tasks:

### Environment variables (Windows only)

If you configured PDF Generator to convert files to PDF, for some file formats, you must manually set environment variables that contain the absolute path of the executable that is used to start the corresponding application. The table below lists the environment variables for the native applications.

**NOTE:** Ensure that the required applications are installed on all nodes in the cluster.

**NOTE:** All environment variables and respective paths are case-sensitive.

Application	Environment variable	Example
Adobe Acrobat	Acrobat_PATH	C:\Program Files (x86)\Adobe\Acrobat 2017\Acrobat\Acrobat.exe
Notepad	Notepad_PATH	C:\WINDOWS\notepad.exe You can leave the Notepad_PATH variable blank.
OpenOffice	OpenOffice_PATH	C:\Program Files (x86)\OpenOffice 4

**NOTE:** These environment variables must be set for all nodes in the cluster.

**NOTE:** The environment variable `OpenOffice_PATH` is set to the installation folder instead of the path to the executable. (This variable is applicable for both, Windows and Linux.)

## Configuring the application server to use HTTP proxy server

If the computer that AEM Forms on JEE is running on uses proxy settings to access external web sites, the application server should be started with the following values set as Java virtual machine (JVM) arguments:

```
-Dhttp.proxyHost=[server host]
-Dhttp.proxyPort=[server port]
```

Complete the following procedure to start your application server with HTTP proxy host setting.

1) From a command line, edit the run script in the *[appserver root]/bin/* directory:

- (Windows)
  - standalone.conf.bat
- (Linux, UNIX)
  - standalone.conf

2) Add the following text to the script file:

```
Set JAVA_OPTS=%JAVA_OPTS%
-Dhttp.proxyHost=[server host]
-Dhttp.proxyPort=[server port]
```

3) Save and close the file.

## (Windows only) Setting the Adobe PDF Printer as the default printer

You must set the Adobe PDF Printer to be the default printer on the server. If the Adobe PDF Printer is not set as the default, PDF Generator cannot convert files successfully.

For clusters, you must set Adobe PDF Printer as the default printer on all nodes.

### Set the default printer

- 1) Select **Start > Printers and Scanners**.
- 2) In the Printers and Scanners window, right-click **Adobe PDF** and select **Set as Default Printer**.

## (Windows only) Configuring Acrobat Professional

**NOTE:** This procedure is required only if you upgraded to or installed Acrobat after you completed the AEM Forms on JEE installation. Upgrading Acrobat can be completed after you run Configuration Manager and deploy AEM Forms on JEE to the application server. Acrobat Professional root directory is designated as *[Acrobat root]*. Typically, the root directory is *C:\Program Files (x86)\Adobe\Acrobat 2017\Acrobat\*.

## Configure Acrobat for use with PDF Generator

- 1) If an earlier version of Acrobat is installed, uninstall it by using Add or Remove Programs in the Windows Control Panel.
- 2) Install Acrobat 2017.
- 3) Navigate to the additional scripts on the AEM Forms from *[aem\_forms root]/pdfg\_config* folder.
- 4) Run the following batch file:  

```
Acrobat_for_PDFG_Configuration.bat [aem_forms root]/pdfg_config
```
- 5) On other cluster nodes on which you do not run AEM Forms on JEE Configuration Manager, do the following:
  - Add a new registry DWORD entry named `SplWOW64TimeOut` at `HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\Print`. Set its value to 60000.
  - Copy `PDFGen.api` from the *[aem-forms root]/plugins/x86\_win32* directory on the node where AEM Forms on JEE is installed to the *[Acrobat root]/plug\_ins* directory on the node being currently configured.
- 6) Open Acrobat and select **Help > Check for updates > Preferences**.
- 7) De-select **Automatically check for Adobe updates**.

## Validate the Acrobat installation

- 1) Navigate to a PDF file on your system and double-click it to open it in Acrobat. If the PDF file opens successfully, Acrobat is installed correctly.
- 2) If the PDF file does not open correctly, uninstall Acrobat and reinstall it.

**NOTE:** Ensure that you dismiss all Acrobat dialog boxes that are displayed after Acrobat installation is complete and disable the automatic updates for Acrobat. Set the `Acrobat_PATH` environment variable to point to `Acrobat.exe`. For example, `C:\Program Files (x86)\Adobe\Acrobat 2017\Acrobat\Acrobat.exe`.

## Add temporary directories to trusted directories list in Acrobat

The `OptimizePDF` service uses Adobe Acrobat and mandates that AEM Forms on JEE temporary directory and PDF Generator temporary directory are listed in the trusted directories list of Acrobat.

If AEM Forms on JEE temporary directory and PDF Generator temporary directory are not listed in the trusted directories list, the `OptimizePDF` service fails to run. Perform the following steps to add directories to the temporary directory list:

- 1) Open Acrobat, Choose **Edit > Preferences**.
- 2) From the Categories on the left, select **Security (Enhanced)**, and then select the **Enable Enhanced Security** option.
- 3) To add AEM Forms on JEE temporary directory and PDF Generator temporary directory to the trusted directories list, click **Add Folder Path**, select directories, and click **OK**.

## Adding fonts to PDF Generator

AEM Forms on JEE provides a central repository of fonts, which is accessible to all AEM Forms on JEE modules. Make any extra fonts available to non-AEM Forms on JEE applications on the server so that PDF Generator can use these fonts to create PDF documents created with these applications.

**NOTE:** Restart the application server after adding new fonts to the specified fonts folder.

### Non-AEM Forms on JEE applications

The following list contains non-AEM Forms on JEE applications that PDF Generator can use for PDF generation on the server side:

#### *Windows-only Applications*

- Microsoft Office Word
- Microsoft Office Excel
- Microsoft Office PowerPoint
- Microsoft Office Project
- Microsoft Office Publisher
- Adobe FrameMaker
- Adobe PageMaker
- Adobe Acrobat Professional

#### *Multi-platform applications*

- OpenOffice Writer
- OpenOffice Calc
- OpenOffice Draw
- OpenOffice Impress

**NOTE:** In addition to these applications, your list may include additional applications that you added.

Of the above applications, the OpenOffice Suite (which includes Writer, Calc, Draw, and Impress) is available on Windows and Linux platforms, whereas other applications are available on Windows only.

### Adding new fonts to Windows applications only

All Windows-only applications that are mentioned above can access all the fonts available in the C:\Windows\Fonts (or equivalent) folder. In addition to C:\Windows\Fonts, each of these applications may have its own private fonts folders.

Therefore, if you plan to add any custom fonts to the AEM Forms on JEE fonts repository, ensure that the same fonts are available to the Windows-only applications also by copying these fonts to either C:\Windows\Fonts or to an equivalent folder.

Your custom fonts must be licensed under an agreement that allows you to use them with the applications that have access to these fonts.

## Adding new fonts to other applications

If you added support for PDF creation in other applications, see the Help for these applications to add new fonts. In Windows, copying your custom fonts to the C:\Windows\Fonts (or equivalent) folder should be sufficient.

## Adding new fonts to OpenOffice Suite

Adding custom fonts to OpenOffice Suite is explained on the OpenOffice *Fonts-FAQ* page at <http://wiki.services.openoffice.org>.

## Configuring HTML to PDF conversions

The HTML-to-PDF conversion process is designed to use the settings from Acrobat DC Pro that override the settings from PDF Generator.

**NOTE:** This configuration is required to enable the HTML-to-PDF conversion process, otherwise this conversion type will fail.

### Configure the HTML-to-PDF conversion

- 1) Install and validate Acrobat as described in [Configuring Acrobat Professional](#).
- 2) Locate the pdfgen.api file in the *[aem-forms root]\plugins\x86\_win32* directory and copy it to *[Acrobat root]\Acrobat\plug\_ins* directory.

**NOTE:** This configuration is required only if you are installing Acrobat after JEE installation.

### Enable support for Unicode fonts in HTML to PDF conversions

**IMPORTANT:** The HTML-to-PDF conversion fails if the zipped input file contains HTML files with double-byte characters in filenames. To avoid this problem, do not use double-byte characters when naming HTML files.

- 1) Copy the Unicode font to any of the following directories as appropriate for your system:

- Windows
  - [Windows root]\Windows\fonts*
  - [Windows root]\WINNT\fonts*
- UNIX
  - /usr/lib/X11/fonts/TrueType*
  - /usr/openwin/lib/X11/fonts/TrueType*
  - /usr/share/fonts/default/TrueType*
  - /usr/X11R6/lib/X11/fonts/ttf*
  - /usr/X11R6/lib/X11/fonts/truetype*
  - /usr/X11R6/lib/X11/fonts/TrueType*
  - /usr/X11R6/lib/X11/fonts/TTF*
  - /Users/cfqouser/Library/Fonts*
  - /System/Library/Fonts*

```

/Library/Fonts
/Users/ + System.getProperty(<username>, root) + /Library/Fonts
System.getProperty(JAVA_HOME) + /lib/fonts

```

**NOTE:** Ensure that the directory `/usr/lib/X11/fonts` exists. If it does not exist, create a symbolic link from `/usr/share/X11/fonts` to `/usr/lib/X11/fonts` using the `ln` command.

**NOTE:** Ensure that the fonts are present in either `/usr/share/fonts` or `/usr/share/X11/fonts` directory.

- 2) Unzip the IBM type1 courier font to the `/usr/share/X11/fonts/font-ibm-type1-1.0.3` folder. You can download the fonts from any trusted source for example, [sample fonts](#).
- 3) Create a symbolic link from `/usr/share/fonts` to `/usr/share/X11/fonts`.

## Installing the (Deprecated) Network Printer Client

PDF Generator includes an executable file to install the PDF Generator network printer on a client computer. After the installation is complete, a PDF Generator printer is added to the list of existing printers on the client computer. This printer can then be used to send documents for conversion to PDF.

**NOTE:** The Network Printer Client installation wizard available in the administration console is supported only on Windows operating system. Ensure that you use a 32-bit JVM to launch the Network Printer Client installation wizard. You will encounter an error if you use a 64-bit JVM.

If the PDFG Network Printer fails to install on Windows or if you want to install the printer on UNIX or Linux platforms, use the operating system's native Add Printer utility and configure it as described in [ConfigurePDFGNetworkPrinteronWindowsusingthenativeAddPrinterwizard](#)

### Install the PDF Generator Network Printer Client

**NOTE:** Before installing the PDF Generator network printer client on Windows Server, ensure that you have the Internet Printing Client feature installed on your Windows Server. For installing the feature, see Windows Server help.

- 1) Ensure that you have successfully installed PDF Generator on your server.
- 2) Do one of the following:
  - From a Windows client computer, open the following URL in your web browser, where `[host]` is the name of the server where you installed PDF Generator and `[port]` is the application server port used.  
`http://[host]:[port]/pdfg-ipp/install`
  - In administration console, click **Home > Services > PDF Generator > PDFG Network Printer**. In the **PDFG Network Printer Installation** section, click **Click here** to launch the PDFG Network Printer Installation.
- 3) On the Configure Internet Port screen, select **Use the specified user account** option, and provide the credentials of a AEM Forms on JEE user who has the PDFG Administrator/User role. This user must also have an email address that can be used to receive the converted files. To have this security setting apply to all users on the client computer, select **Use the same security options for all users**, and then click **OK**.

**NOTE:** If the user's password changes, then users will need to reinstall the PDFG Network Printer on their computers. You cannot update the password from administration console.

Upon successful installation, a dialog box appears, indicating that the printer is successfully installed.

- 4) Click **OK**. You will now have a PDF Generator printer available in your list of printers.

#### Configure PDFG Network Printer on Windows using native Add Printer wizard

- 1) Click **Start >Printers and Scanners** and double-click **Add Printer**.
- 2) Click **Next**, select **A network printer, or a printer attached to another computer**, and then click **Next**.
- 3) Select **Connect to a printer on the Internet or on a home or office network** and type the following URL for the PDFG printer, where *[host]* is the server name and *[port]* is the port number where the server is running:  
`http://[host]:[port]/pdfg-ipp/printer`
- 4) On the Configure Internet Port screen, select **Use the specified user account** and provide valid User credentials.
- 5) In the **Printer Driver Select** box, choose any standard PostScript-based printer driver (for example, HP Color LaserJet PS).
- 6) Complete the installation by choosing appropriate options (for example, setting this printer as default).  
**NOTE:** The user credentials used while adding the printer must have a valid email ID configured in User Management to receive the response.
- 7) Configure the email service's sendmail service. Provide a valid SMTP server and authentication information in the service's configuration options.

#### Install and configure the PDFG Network Printer Client using Proxy server port forwarding

- 1) Configure port forwarding on the CC Proxy server on a particular port to the AEM forms on JEE Server, and disable the authentication at proxy server level (because AEM Forms on JEE uses its own authentication). If a client connects to this Proxy server on the forwarded port, then all the requests will be forwarded to the AEM Forms on JEE Server.
- 2) Install PDFG Network Printer using the following URL:  
`http://[proxy server]:[forwarded port]/pdfg-ipp/install.`
- 3) Provide the necessary credentials for authentication of the PDFG Network Printer.
- 4) The PDFG Network Printer will be installed on the client machine which you can use for PDF conversion using the firewall protected AEM Forms on JEE Server.

## Changing File Block Settings

Change Microsoft Office trust center settings to enable PDFG to convert older versions of Microsoft office documents.

- 1) Click the **File** tab in any Office 2016 application. Under **File**, click **Options**; the Options dialog box appears
- 2) Click **Trust Center**, and then click **Trust Center Settings**.
- 3) In the **Trust Center settings**, click **File Block Settings**.
- 4) In the File Type list, uncheck open for the file type that you want PDF Generator to convert.

## Watched folder performance parameters

To avoid `java.io.IOException` error messages indicating that not enough disk space is available to perform PDF conversions by using a watched folder, you can modify the settings for PDF Generator in administration console.

### Set performance parameters for PDF Generator

- 1) Log in to administration console and click **Services > Applications and Services > Service Management**.
- 2) In the list of services, navigate to and click **PDFGConfigService**, and then set the following values:
  - **PDFG Cleanup Scan Seconds**: 1800
  - **Job Expiration Seconds**: 6000
  - **Server Conversion Timeout**: Change the default of 270 to a higher value, such as 450.
- 3) Click **Save** and restart the server.

## Enable PDF Conversion for MS Word document containing protected fields

PDF Generator supports Microsoft Word documents containing protected fields. To enable PDF Conversion for Microsoft Word document containing protected fields, change the file type settings:

- 1) In the **administration console**, navigate to **Services > PDF Generator > File Type Settings**, and open your file type settings profile.
- 2) Expand the **Microsoft Word** option and select the **Preserve document markup in Adobe PDF (for Microsoft Office)** option.
- 3) Click **Save As**, specify name of the file type setting, and click **OK**.

## 6.4. Configure SSL for Document Security

Document Security requires the application server to be configured to use SSL. See [administrationhelp](#)



## 6.5. Configure LDAP access

**NOTE:** If you have configured LDAP access in previous version, skip the following section:

When upgrading, use the following procedure as a guideline when configuring User Management to support authentication using LDAP.

If you configured LDAP with previous versions of LiveCycle, those settings are migrated during the upgrade process, and you do not need to perform the steps in this section. If you did not previously configure LDAP, use the following procedure as guidelines when configuring User Management to support authentication using LDAP.

### Configure User Management (Local Domain)

- 1) Open a web browser, navigate to `http://[host]:[port]/adminui`, and log in. (See [Accessingadministrationconsole](#).)
- 2) Click **Settings > User Management > Domain Management**, and then click **New Local Domain**.
- 3) In the appropriate boxes, enter the domain ID and name. (See “Adding local domains” in [Administration](#) help.)
- 4) help.)
- 5) (Optional) Disable **Enable Account Locking** option to disable account locking.
- 6) Click **OK**.

### Configure User Management with LDAP (Enterprise Domain)

- 1) Open a web browser, navigate to `http://[host]:[port]/adminui` and log in. (See [Accessingadministrationconsole](#).)
- 2) Click **Settings > User Management > Domain Management**, and then click **New Enterprise Domain**.
- 3) In the **ID** box, type a unique identifier for the domain and, in the **Name** box, type a descriptive name for the domain.

**NOTE:** When using MySQL for your AEM Forms on JEE database, use only single-byte (ASCII) characters for the ID. (See “Adding enterprise domains” in [Administration](#) Help.)

- 4) Click **Add Authentication** and, in the **Authentication Provider** list, select **LDAP**.
- 5) Click **OK**.
- 6) Click **Add Directory** and, in the **Profile Name** box, type a name for your LDAP profile.
- 7) Click **Next**.
- 8) Specify values in the **Server**, **Port**, **SSL**, and **Binding** fields. In the **Populate Page with** box, select a directory settings option such as **Default Sun ONE values**. Also, specify values in the **Name** and **Password** box that would be used to connect to the LDAP database when anonymous access is not enabled. (See “Directory settings” in [Administration](#)

- 9) Help.)
- 10) (Optional) Test your configuration:
  - Click **Test**. The screen displays a message indicating either a successful server test or any configuration errors that exist.
- 11) Click **Next** and configure the **User Settings** as required. (See “Directory settings” in [Administration](#)
- 12) Help.)
- 13) (Optional) Test your configuration:
  - Click **Test**.
  - In the Search Filter box, verify the search filter or specify a new search filter, and then click **Submit**. The screen displays a list of entries that match the search criteria.
  - Click **Close** to return to the User Settings screen.
- 14) Click **Next** and configure the **Group Settings** as required. (See “Directory settings” in [Administration](#)
- 15) Help.)
- 16) (Optional) Test your configuration:
  - Click **Test**.
  - In the Search Filter box, verify the search filter or specify a new search filter, and then click **Submit**. The screen displays a list of entries that match the search criteria.
  - Click **Close** to return to the Group Settings screen.
- 17) Click **Finish** to exit the New Directory page and then click **OK** to exit.

## 6.6. Enable FIPS mode

**NOTE:** If you have configured it in the previous version, skip the following section:

AEM Forms on JEE provides a FIPS mode to restrict data protection to Federal Information Processing Standard (FIPS) 140-2 approved algorithms using the RSA BSAFE Crypto-C 2.1 encryption module.

If you did not enable this option by using Configuration Manager during AEM Forms on JEE configuration or if you enabled it but want to turn it off, you can change this setting through Administration Console.

Modifying FIPS mode requires you to restart the server.

FIPS mode does not support Acrobat versions earlier than 7.0. If FIPS mode is enabled and the Encrypt With Password and Remove Password processes include the Acrobat 5 setting, the process fails.

In general, when FIPS is enabled, the Assembler service does not apply password encryption to any document. If this is attempted, a `FIPSMODEException` is thrown, indicating that “Password encryption is not permitted in FIPS mode.” Additionally, the `PDFsFromBookmarks` element is not supported in FIPS mode when the base document is password-encrypted.

## Turn FIPS mode on or off

- 1) Log in to administration console.
- 2) Click **Settings > Core System Settings > Configurations**.
- 3) Select **Enable FIPS** to enable FIPS mode or deselect to disable FIPS mode.
- 4) Click **OK** and restart the application server.

**NOTE:** AEM forms on JEE software does not validate code to ensure FIPS compatibility. It provides a FIPS operation mode so that FIPS-approved algorithms are used for cryptographic services from the FIPS-approved libraries (RSA).

## 6.7. Configuring Connector for EMC Documentum

If you installed Connector for EMC Documentum as part of your AEM Forms on JEE, complete the following procedure to configure the service to connect to the Documentum repository.

### Configure Connector for EMC Documentum

- 1) Locate the `adobe-component-ext.properties` file in the `[appserver root]/bin` folder (if the file does not exist, create it).
- 2) Add a new system property that provides the following Documentum Foundation Classes JAR files:
  - `dfc.jar`
  - `aspectjrt.jar`
  - `log4j.jar`
  - `jaxb-api.jar`
  - `configservice-impl.jar`
  - `configservice-api.jar`
  - `commons-codec-1.3.jar`
  - `commons-lang-2.4.jar`

*The new system property should take on this form:*

*`[component id].ext=[JAR files and/or folders]`*

- 3) Open a web browser and enter this URL:  
`http://[host]:[port]/adminui`
- 4) Log in using the default user name and password:  
**User name:** *administrator*  
**Password:** *password*
- 5) Navigate to **Services > Connector for EMC Documentum > Configuration Settings** and perform these tasks:
  - Type all the required Documentum repository information.

- To use Documentum as your repository provider, under Repository Service Provider Information, select **EMC Documentum Repository Provider**, and then click **Save**. For more information, click the Help link in the upper-right corner of the page in the [Administration](#) Help.
- 6) (Optional) Navigate to **Services > Connector for EMC Documentum > Repository Credentials Settings**, click **Add**, specify the Docbase information, and then click **Save**. (For more information, click **Help** in the upper-right corner.)
  - 7) If the application server is not currently running, start the server. Otherwise, stop and then restart the server.
  - 8) Open a web browser and enter this URL.  
`http://[host]:[port]/adminui`
  - 9) Log in using the default user name and password:  
**User name:** *administrator*  
**Password:** *password*
  - 10) Navigate to **Services > Applications and Services > Service Management** and select these services:
    - EMCDocumentumAuthProviderService
    - EMCDocumentumContentRepositoryConnector
    - EMCDocumentumRepositoryProvider
    - EMCDocumentumECMUpgradeService
  - 11) Click **Start**. If any of the services do not start correctly, check the settings you completed earlier.
  - 12) Do one of the following tasks:
    - To use the Documentum Authorization service (EMCDocumentumAuthProviderService) to display content from a Documentum repository in the Resources view of Workbench, continue with this procedure. Using the Documentum Authorization service overrides the default AEM Forms on JEE authorization and must be configured to log in to Workbench using Documentum credentials.
    - To use the AEM Forms on JEE repository, log in to Workbench by using the AEM Forms on JEE super administrator credentials (by default, *administrator* and *password*).

*You have now completed the required steps for this procedure. Use the credentials provided in this step for accessing the default repository in this case and use the default AEM Forms on JEE authorization service.*
  - 13) Enable Remoting and EJB endpoints by doing these tasks:
    - Log in to administration console and click **Home > Services > Application and Services > Service Management**.
    - Filter the category *Connector for EMC Documentum* and click **EMC DocumentumContentRepositoryConnector:1.0**.
    - Select the disabled endpoints and enable them.
  - 14) Restart the application server.
  - 15) Log in to administration console and click **Settings > User Management > Domain Management**.

- 16) Click **New Enterprise Domain**, and type a domain ID and name. The domain ID is the unique identifier for the domain. The name is a descriptive name for the domain.

***NOTE:** When using MySQL for your AEM Forms on JEE database, use only single-byte (ASCII) characters for the ID. (See “Adding enterprise domains” in AEM Forms on JEE administration help.)*

- 17) Add a custom authentication provider:

- Click **Add Authentication**.
- In the Authentication Provider list, select **Custom**.
- Select **EMCDocumentumAuthProvider** and then click **OK**.

- 18) Add an LDAP authentication provider:

- Click **Add Authentication**.
- In the Authentication Provider list, select **LDAP**, and then click **OK**.

- 19) Add an LDAP directory:

- Click **Add Directory**.
- In the Profile Name box, type a unique name, and then click **Next**.
- Specify values for the **Server**, **Port**, **SSL**, **Binding**, and **Populate page with** options. If you select **User** for the Binding option, you must also specify values for the **Name** and **Password** fields.
- (Optional) Select **Retrieve Base DN** to retrieve base domain names, as required.
- Click **Next**, configure the user settings, click **Next**, configure group settings, as required, and then click **Next**.

*For details about the settings, click **User Management Help** in the upper-right corner of the page.*

- 20) Click **OK** to exit the Add Directory page and then click **OK** again.

- 21) Select the new enterprise domain and click **Sync Now**. Depending on the number of users and groups in your LDAP network and the speed on your connection, the synchronization process may take several minutes.

*(Optional) To verify the status of the synchronization, click **Refresh** and view the status in the **Current Sync State** column.*

- 22) Navigate to **Settings > User Management > Users and Groups**.

- 23) Search for users that were synchronized from LDAP and perform these tasks:

- Select one or more users and click **Assign Role**.
- Select one or more AEM Forms on JEE roles and click **OK**.
- Click **OK** a second time to confirm the role assignment.

*Repeat this step for all users that you assign roles to. For more information, click **User Management Help** in the upper-right corner of the page.*

- 24) Start Workbench and log in by using the credentials for the Documentum repository:

**Username:** [username]@[repository\_name]

**Password:** [password]

*After you log in, the Documentum repository appears in the Resources view within Workbench. If you do not log in using the `username@repository_name`, Workbench attempts to log in to the default repository.*

- 25) (Optional) To install the AEM Forms on JEE Samples for Connector for EMC Documentum, create a Documentum repository named Samples, and then install the samples in that repository.

## 6.8. Configuring the Connector for IBM Content Manager

**NOTE:** AEM forms supports IBM Content Manager. See the [Supported Platform Combinations](#) document and make sure your ECM is upgraded to the supported version.

If you installed the Connector for IBM Content Manager as part of your AEM Forms installation, complete the following procedure to configure the service to connect to the IBM Content Manager datastore.

### Configure Connector for IBM Content Manager

- 1) Locate the `adobe-component-ext.properties` file in the `[appserver root]/bin` folder. If the file does not exist, create it.
- 2) Add a new system property that provides the location of the following IBM II4C JAR files:
  - `cmb81.jar`
  - `cmbcm81.jar`
  - `cmbicm81.jar`
  - `cmblog4j81.jar`
  - `cmbSDK81.jar`
  - `cmbutil81.jar`
  - `cmbutilicm81.jar`
  - `cmbview81.jar`
  - `cmbwas81.jar`
  - `cmbwcm81.jar`
  - `cmgmt`

**NOTE:** `cmgmt` is not a JAR file. On Windows, by default, this folder is at `C:/Program Files/IBM/db2cmv8/`.

- `common.jar`
- `db2jcc.jar`
- `db2jcc_license_cisuz.jar`
- `db2jcc_license_cu.jar`
- `ecore.jar`
- `ibmjgssprovider.jar`
- `ibmjsseprovider2.jar`
- `ibmpkcs.jar`

- icrm81.jar
- jcache.jar
- log4j-1.2.8.jar
- xerces.jar
- xml.jar
- xsd.jar

*The new system property looks similar to the following:*

```
[component id].ext=[JAR files and/or folders]
```

*For example, using a default DB2 Universal Database Client and I14C installation, in the file, add the following system property on a new line, with no line breaks, and end the line with a carriage return:*

```
C:/Program Files/IBM/db2cmv8/cmgmt,  
C:/Program Files/IBM/db2cmv8/java/jre/lib/ibmjsseprovider2.jar,  
C:/Program Files/IBM/db2cmv8/java/jre/lib/ibmjgssprovider.jar,  
C:/Program Files/IBM/db2cmv8/java/jre/lib/ibmpkcs.jar,  
C:/Program Files/IBM/db2cmv8/java/jre/lib/xml.jar,  
C:/Program Files/IBM/db2cmv8/lib/cmbview81.jar,  
C:/Program Files/IBM/db2cmv8/lib/cmb81.jar,  
C:/Program Files/IBM/db2cmv8/lib/cmbcm81.jar,  
C:/Program Files/IBM/db2cmv8/lib/xsd.jar,  
C:/Program Files/IBM/db2cmv8/lib/common.jar,  
C:/Program Files/IBM/db2cmv8/lib/ecore.jar,  
C:/Program Files/IBM/db2cmv8/lib/cmbicm81.jar,  
C:/Program Files/IBM/db2cmv8/lib/cmbwcm81.jar,  
C:/Program Files/IBM/db2cmv8/lib/jcache.jar,  
C:/Program Files/IBM/db2cmv8/lib/cmbutil81.jar,  
C:/Program Files/IBM/db2cmv8/lib/cmbutilicm81.jar,  
C:/Program Files/IBM/db2cmv8/lib/icrm81.jar,  
C:/Program Files/IBM/db2cmv8/lib/db2jcc.jar,  
C:/Program Files/IBM/db2cmv8/lib/db2jcc_license_cu.jar,  
C:/Program Files/IBM/db2cmv8/lib/db2jcc_license_cisuz.jar,  
C:/Program Files/IBM/db2cmv8/lib/xerces.jar,  
C:/Program Files/IBM/db2cmv8/lib/cmblog4j81.jar,  
C:/Program Files/IBM/db2cmv8/lib/log4j-1.2.8.jar,  
C:/Program Files/IBM/db2cmv8/lib/cmbsdk81.jar,  
C:/Program Files/IBM/db2cmv8/lib/cmbwas81.jar
```

- 3) If the application server is not currently running, start the server; otherwise, stop and then restart the server.

You can now connect to the IBM Content Manager datastore from the IBMCMConnectorService Property Sheets by using the Use User Credentials as the login mode.

You have now completed the required steps for this procedure.

(Optional) If you want to connect to IBM Content Manager datastore from IBMCMConnectorService Property Sheets by using the Use Credentials From Process Context as the login mode, complete the following procedure.

### Connect using Use Credentials from process context login mode

- 1) Open a web browser and enter this URL:  
*http://[host]:[port]/adminui*
- 2) Log in using the super administrator credentials. Default values set during installation are:  
**User name:** *administrator*  
**Password:** *password*
- 3) Click **Services > Connector for IBM Content Manager**
- 4) Type all of the required repository information and click **Save**. For more information about the IBM Content Manager repository information, click the **Help** link in the upper-right corner of the page.
- 5) Do one of these tasks:
  - To use the IBM Content Manager Authorization service IBMCMAuthProvider to use content from an IBM Content Manager datastore, in the Processes view of Workbench, continue with this procedure. Using the IBM Content Manager Authorization service overrides the default AEM Forms authorization and must be configured to log in to Workbench by using IBM Content Manager credentials.
  - To use the System Credentials provided in step 4 to use content from an IBM Content Manager datastore, in the Processes view of Workbench, log in to Workbench by using the AEM Forms super administrator credentials (by default, *administrator* and *password*). You have now completed the required steps for this procedure. The System Credentials that are provided in step 4 use the default AEM Forms authorization service for accessing the default repository in this case.
- 6) Log in to the administration console, and click **Settings > User Management > Domain Management**.
- 7) Click **New Enterprise Domain** and type a domain ID and name. The domain ID is the unique identifier for the domain. The name is a descriptive name for the domain.  
*NOTE: When using MySQL for your AEM Forms database, use only single-byte (ASCII) characters for the ID. (See Adding enterprise domains in [administration help](#) .)*
- 8) Add a custom authentication provider:
  - Click **Add Authentication**.
  - In the **Authentication Provider** list, select **Custom**, and then select **IBMCMAuthProviderService** and click **OK**.
- 9) Add an LDAP authentication provider:
  - Click **Add Authentication**.
  - In the **Authentication Provider** list, select **LDAP** and then click **OK**.



- 10) Add an LDAP directory:
  - Click **Add Directory**.
  - In the **Profile Name** box, type a unique name, and then click **Next**.
  - Specify values for the **Server**, **Port**, **SSL**, **Binding**, and **Populate page with** options. If you select **User** for the **Binding** option, you must also specify values for the **Name** and **Password** fields. (Optional) Select **Retrieve Base DN** to retrieve base domain names, as required. When finished, click **Next**.
  - Configure the user settings, click **Next**, configure group settings as required, and then click **Next**.

*For details about the above settings, click the **Help** link in the upper-right corner of the page.*

- 11) Click **OK** to exit the Add Directory page and click **OK** again.
- 12) Select the new enterprise domain and click **Sync Now**. Depending on the number of users and groups in your LDAP network and the speed on your connection, the synchronization process may take several minutes.
- 13) To verify the status of the synchronization, click **Refresh** and view the status in the **Current Sync State** column.
- 14) Navigate to **Settings > User Management > Users and Groups**.
- 15) Search for users that were synchronized from LDAP and do these tasks:
  - Select one or more users and click **Assign Role**.
  - Select one or more AEM Forms roles and click **OK**.
  - Click **OK** a second time to confirm the role assignment.

*Repeat this step for all users that you want to assign roles to. For more information, click the **Help** link in the upper-right corner of the page.*

- 16) Start Workbench and log in using the following credentials for IBM Content Manager datastore:

**Username:** [username]@[repository\_name]

**Password:** [password]

*The IBM Content Manager datastore can now be used in the Processes view within Workbench when the login mode for IBMCMConnectorService orchestrable components is selected as **Use Credentials from process context**.*

## 6.9. Configuring the Connector for IBM FileNet

If you installed Connector for IBM FileNet as part of your AEM Forms, you must configure the service to connect to the FileNet object store.

Complete the following procedure to configure Connector for IBM FileNet.

- 1)
- 2) Add a new system property that provides the location of these FileNet Application Engine JAR files:  
**NOTE:** Add the pe.jar file only if your deployment uses the IBMFileNetProcessEngineConnector service. The new system property should reflect this structure:

```
[component id].ext=[JAR files and/or folders]
```

**NOTE:** Do not overwrite the existing contents of the properties file. Simply append the new system property to the contents.

*For example, using a default FileNet Application Engine installation on a Windows operating system, add the following system property on a new line with no line breaks and end the line with a carriage return:*

**NOTE:** The following text contains formatting characters for line breaks. If you copy this text to a location outside this document, remove the formatting characters when you paste it to the new location.

```
com.adobe.livecycle.ConnectorforIBMFileNet.ext=
C:/Program Files/FileNet/AE/CE_API/lib2/javaapi.jar,
C:/Program Files/FileNet/AE/CE_API/lib2/log4j-1.2.13.jar
```

3) (FileNet Process Engine Connector only) Configure the connection properties for the process engine as follows:

- Using a text editor, create a file with the following content as a single line and end the line with a carriage return:

*(FileNet 5.x only)*

```
RemoteServerUrl =
comp:http://[contentserver_IP]:[contentengine_port]/wsi/FNCEWS40MTOM
/
```

- Save the file as WcmApiConfig.properties in a separate folder, and add the location of the folder that contains the WcmApiConfig.properties file to the adobe-component-ext.properties file.

*For example, if you save the file as c:/pe\_config/WcmApiConfig.properties, add the path c:/pe\_config to the adobe-component-ext.properties file.*

**NOTE:** The filename is case-sensitive.

4) Locate the lc\_turnkey.xml file in the following folder and add the following application policy as a child of the <security-domains> node:

- (Adobe-preconfigured JBoss, single server) [appserver root]/standalone/configuration

```
<security-domain name = "FileNetP8WSI">
  <authentication>
    <login-module code = "com.filenet.api.util.WSILoginModule" flag =
      "required">
    </login-module>
  </authentication>
</security-domain>
```

*If you are using process engine then add the following code after the </security-domain> node:*

```
<security-domain name = "FileNetP8">
  <authentication>
    <login-module code = "com.filenet.api.util.WSILoginModule" flag
    = "required">
    </login-module>
```

```

    </authentication>
  </security-domain>

```

- **(Adobe-preconfigured JBoss, cluster)** *[appserver root]/domain/configuration/*

```

<security-domain name = "FileNetP8WSI">
  <authentication>
    <login-module code = "com.filenet.api.util.WSILoginModule" flag =
      "required">
    </login-module>
  </authentication>
</security-domain>

```

*If you are using process engine then add the following code after the </security-domain> node:*

```

<security-domain name = "FileNetP8">
  <authentication>
    <login-module code = "com.filenet.api.util.WSILoginModule" flag
= "required">
    </login-module>
  </authentication>
</security-domain>

```

- 5) If the application server is not currently running, start the server. Otherwise, stop and then restart the server.
- 6) If JBoss runs as a service, start (or restart) the JBoss for Adobe Experience Manager Forms 6.2 service.
- 7) **(Cluster only)** Repeat all previous steps on each instance on the cluster.
- 8) Open a web browser and enter this URL:  
*http://[host]:[port]/adminui*
- 9) Log in using the default user name and password:  
**User name:** *administrator*  
**Password:** *password*
- 10) Click **Services > Connector for IBM FileNet**.
- 11) Provide the Content Engine URL. For example,  
*cemp:http://ContentEngineHostNameorIP:port/wsi/FNCEWS40MTOM?jaasConfigurationName=FileNetP8WSI*
- 12) Provide all the required FileNet repository information and, under Repository Service Provider Information, select **IBM FileNet Repository Provider**.  
*If your deployment uses the optional process engine service, under Process Engine Settings, select **Use Process Engine Connector Service** and specify the process engine settings. For more information, click the **Help** link in the upper-right corner of the page.*  
**NOTE:** The credentials that you provide in this step are validated later when you start the IBM FileNet repository services. If the credentials are not valid, an error is thrown and the services will not start.
- 13) Click **Save** and navigate to **Services > Applications and Services > Service Management**.

- 14) Select the check box next to **IBMFileNetProcessEngineConnector** (if configured) and then click **Start**.
- 15) Do one of the following tasks:
  - To use the FileNet Authorization service (IBMFileNetAuthProviderService) to display content from a FileNet object store in the Resources view of Workbench, continue with this procedure. Using the FileNet Authorization service overrides the default AEM Forms authorization and must be configured to log in to Workbench by using FileNet credentials.
  - To use the AEM forms repository, log in to Workbench by using the super administrator credentials (by default, *administrator* and *password*). The credentials provided in step 16 use the default AEM Forms authorization service for accessing the default repository in this case.
- 16) Enable Remoting and EJB endpoints by doing these tasks:
  - Log in to administration console and click **Home > Services > Application and Services > Service Management**.
  - Filter the category *Connector for IBM FileNet* and click **IBMFileNetContentRepositoryConnector:1.0**.
  - Select the disabled endpoints and enable them.
- 17) Restart your application server.
- 18) Log in to administration console and click **Settings > User Management > Domain Management**.
- 19) Click **New Enterprise Domain** and then type a domain ID and name. The domain ID is the unique identifier for the domain. The name is a descriptive name for the domain.

*When using MySQL for your AEM Forms database, use only single-byte (ASCII) characters for the ID. (See “Adding enterprise domains” in [Administration Help](#)*
- 20) Add a custom authentication provider:
  - Click **Add Authentication**.
  - In the **Authentication Provider** list, select **Custom**.
  - Select **IBMFileNetAuthProviderService** and then click **OK**.
- 21) Add an LDAP authentication provider:
  - Click **Add Authentication**.
  - In the **Authentication Provider** list, select **LDAP** and then click **OK**.
- 22) Add an LDAP directory:
  - Click **Add Directory** and, in the **Profile Name** box, type a unique name, and then click **Next**.
  - Specify values for the **Server**, **Port**, **SSL**, **Binding**, and **Populate page with** options. If you select **User** for the **Binding** option, you must also specify values for the **Name** and **Password** fields.
  - (Optional) Select **Retrieve Base DN** to retrieve base domain names, as required. When finished, click **Next**.
  - Configure the user settings, click **Next**, configure group settings as required, and then click **Next**.

*For details about the settings, click **Help** link in the upper-right corner of the page.*

- 23) Click **OK** to exit the Add Directory page, and then click **OK** again.
- 24) Select the new enterprise domain and click **Sync Now**. Depending on the number of users and groups in your LDAP network and the speed on your connection, the synchronization process may take several minutes.  
*(Optional) To verify the status of the synchronization, click **Refresh** and view the status in the **Current Sync State** column.*
- 25) Navigate to **Settings > User Management > Users and Groups**.
- 26) Search for users that were synchronized from LDAP and perform these tasks:
  - Select one or more users and click **Assign Role**.
  - Select one or more AEM Forms roles and click **OK**.
  - Click **OK** a second time to confirm the role assignment.

*Repeat this step for all users you want to assign roles to. For more information, click the **Help** link in the upper-right corner of the page.*
- 27) Start Workbench and log in using the following credentials for the IBM FileNet repository:  
**User name:** [username]@[repository\_name]  
**Password:** [password]  
*The FileNet object store should now be visible in the Resources view within Workbench. If you do not log in using the username@repository name, Workbench attempts to log in to the default repository specified in step 16.*
- 28) (Optional) If you intend to install the AEM Forms Samples for Connector for IBM FileNet, create a FileNet object store named *Samples* and install the samples in that object store.  
*After you configure Connector for IBM FileNet, it is recommended that you see administration help for information about configuring Workbench functions properly with your FileNet repository.*

## 6.10. Enable JMX console security

In the default setup of AEM Forms on JEE, JBoss JMX console security is disabled. For steps to enable the JMX console security, see application server documentation.

## 6.11. Enable messaging on standalone JBoss

To enable messaging on a standalone JBoss server for AEM Forms on JEE:

- 1) Enable the messaging module on the JBOSS if it is not enabled yet.  
*Copy the following tags from the `standalone_full.xml` file to the specified location in the `lc_turnkey.xml` file. Both the files are located in the `<aem-forms root>/jboss/standalone/configuration` directory.*
  - Copy the entire tag with its content `<extension module="org.jboss.as.messaging">...</extension>` from the `standalone_full.xml` file and put it after the `<extensions>` tag in the `lc_turnkey.xml` file

- Copy the entire tag with its content `<subsystem xmlns="urn:jboss:domain:messaging:1.4">...</subsystem>` from the `standalone_full.xml` file and put it after the `<profile>` tag in the `lc_turnkey.xml` file
- 2) Run the `add-user.bat` script located at `<aem-forms root>/jboss/bin` to create an application user and add the user to the **guest** group. The JMS DSC component on AEM Forms on JEE expects a Connection Username and Password to be specified. This user must have permission to use JMS Queue/Topic for performing the Send/Receive operation.  
*NOTE: In the `lc_turnkey.xml` file, a user with a guest role is already defined under the `<security-setting match="#">.... </security-settings>` tag. The default user has the privilege to send-receive messages via JMS. However, you must create an application user on the JBoss server with the above role to send-receive JMS messages. While creating a user using the `add-user.bat` script, you can assign it the guest group.*
- 3) Change the JMS DSC Configuration with the user created in step 2.
  - a) Log in to the administration console for AEM Forms on JEE.
  - b) Navigate to **Services > Application and Services > Service Management**.
  - c) Search JMS service.
  - d) In the configuration tab, change the JMS configuration.
- 4) Change `org.jnp.interfaces.NamingContextFactory` to `org.jboss.as.naming.InitialContextFactory` in the JMS Service configuration.

## 6.12. Migrate adaptive forms and Correspondence Management assets

The migration utility makes assets of earlier versions compatible with AEM 6.5 forms. You can download the utility from AEM package share. For detailed steps, see [http://adobe.com/go/learn\\_aemforms\\_migrate\\_assets\\_65](http://adobe.com/go/learn_aemforms_migrate_assets_65)

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### Remove Adobe Correspondence Management Utilities Bundle

AEM Forms shipped Correspondence Management Utilities Bundle with previous releases of AEM Forms. The bundle is not required on AEM 6.5 Forms setup. Perform the following steps to uninstall the bundle:

- 1) Open the `http://[server]:[port]/lc/system/console/bundles` URL in a browser window.
- 2) Search and open the Adobe Correspondence Management Utilities Bundle.
- 3) Click the uninstall icon to remove the bundle.

## Reconfigure Adobe Sign

If you had Adobe Sign configured in the previous version of AEM Forms, then reconfigure Adobe Sign from AEM Cloud services. For more details, see [http://adobe.com/go/learn\\_aemforms\\_integrateadobe-sign\\_65](http://adobe.com/go/learn_aemforms_integrateadobe-sign_65).

## Reconfigure analytics and reports

In AEM 6.5 Forms, traffic variable for source and success event for impression are not available. So, when you upgrade to AEM 6.5 Forms, AEM Forms stops sending data to Adobe Analytics server and analytics reports for adaptive forms and adaptive document are not available. Moreover, AEM 6.5 Forms introduces traffic variable for the version of form analytics and success event for the amount of time spent on a field. So, reconfigure analytics and reports for your AEM Forms environment. For detailed steps, see [http://adobe.com/go/learn\\_aemforms\\_configureanalytics\\_65](http://adobe.com/go/learn_aemforms_configureanalytics_65).

Methods to calculate average fill time for forms and average read time for adaptive documents have changed. So, when you upgrade to AEM 6.5 forms, the old data from previous AEM Forms release for these metrics is available only in Adobe Analytics. It is not visible in AEM Forms analytics reports. For these metrics, AEM Forms analytics reports display data which is captured after performing the upgrade.

# 7. Appendix - Install using the Command Line Interface

## 7.1. Overview

AEM Forms on JEE provides a command line interface (CLI) for the installation program. The CLI is intended to be used by advanced users of AEM Forms on JEE or in server environments which do not support the use of the Graphical User Interface (GUI) of the installation program. The CLI runs in console mode with one interactive session for all install operations.

Before you install the modules using the CLI install option, ensure that you have prepared your environment required to run AEM Forms on JEE according to the Preparing guide for fresh single server installation, cluster setup, or upgrade, as appropriate. The complete AEM Forms on JEE documentation is available at [http://www.adobe.com/go/learn\\_aemforms\\_documentation\\_65](http://www.adobe.com/go/learn_aemforms_documentation_65).

After you start the installation process, follow the on-screen instructions to choose your installation options. Respond to each prompt to proceed to the next step in the installation.

**NOTE:** If you want to change a choice that you made on a previous step, type `back`. You can cancel the installation at any time by typing `quit`.

## 7.2. Install AEM Forms on JEE

- 1) Open a command prompt and navigate to the folder in the installation media or your hard disk that contains the installer executable:
  - (Windows) `server\Disk1\InstData\Windows_64\NoVM`
  - (Linux) `server/Disk1/InstData/Linux/NoVM`
- 2) Open a command prompt and run the following command:
  - (Windows) `install.exe -i console`
  - (Non-Windows) `./install.bin -i console`

**NOTE:** Entering the command without the `-i console` option launches the GUI-based installer.
- 3) Respond to the prompts as described in the following table:



Prompt	Description
Choose Locale	Select the locale for the installation to use by entering a value between 1 and 3. You can select the default value by pressing <b>Enter</b> . The options are Deutsch, English, and Français. English is the default locale.
Upgrade Installation	Select the installation option and press <b>Enter</b> . The options are Perform Update or Skip Update. If the installer detects a previous LiveCycle installation, you can choose to upgrade the installation. The upgrade installation will use information from the existing install to help in the current installation.
Choose Install Folder	On the Destination screen, press <b>Enter</b> to accept the default directory or type the new installation directory location. Do not use accented characters in the directory name. Otherwise, the CLI will ignore the accents and create a directory after modifying the accented characters.
Choose Operating System	<b>(Windows only)</b> Select the operating system that you want to install AEM Forms on JEE to.
AEM forms on JEE Server License Agreement	Press <b>Enter</b> to read through the pages of the license agreement. If you agree to the agreement, type Y and press <b>Enter</b> .
Pre-Installation Summary	Press <b>Enter</b> to continue installation with the choices you have made. Type <code>back</code> to go back to previous steps and change any of the settings.
Ready To Install	Press <b>Enter</b> to start the installation process.
Installing	During the installation process, the progress bar advances to indicate the progress of installation.
Configuration Manager	Press <b>Enter</b> to complete the installation of AEM Forms on JEE. You can run the Configuration Manager in GUI mode by invoking the following script: (Windows): C:\Adobe\Adobe_Experience_Manager_Forms\configurationManager\bin\ConfigurationManager.bat (Non-Windows): /opt/adobe/Adobe_Experience_Manager_Forms/configurationManager/bin/ConfigurationManager.sh

Prompt	Description
Installation Complete	Press <b>Enter</b> to exit the installer.

## 7.3. Error logs

If an error occurs, you can review the `install.log` in the log directory of your installation:

- (Windows) `[aem-forms root]\log`

## 8. Appendix - Configuration Manager Command Line Interface

The CLI is intended to be used in server environments that do not support the use of the Graphical User Interface (GUI) of the Configuration Manager.

### 8.1. Order of operations

The Configuration Manager CLI must follow the same order of operations as the GUI version of the Configuration Manager. Ensure that you use the CLI operations in this order:

- 1) Configure AEM Forms on JEE.
- 2) Configure CRX.
- 3) Update AEM Forms on JEE core settings.
- 4) Migrate existing turnkey database. (Upgrade Turnkey only)
- 5) Manually deploy the configured EAR files.
- 6) Initialize AEM forms on JEE.
- 7) Validate AEM Forms on JEE.
- 8) Perform critical tasks before component deployment.
- 9) Deploy the AEM Forms on JEE modules.
- 10) Validate the AEM Forms on JEE module deployment.
- 11) Upgrade the crx-repository.
- 12) Migrate Data Essential to AEM Forms on JEE
- 13) Post-deployment configurations.
- 14) Check system readiness for PDF Generator.
- 15) Add administrator user for PDF Generator.
- 16) Configure Connector for IBM Content Manager.
- 17) Configure Connector for IBM FileNet.
- 18) Configure Connector for EMC Documentum.
- 19) Configure Connector for SharePoint.

**IMPORTANT:** You must restart each of your cluster nodes after you complete Configuration Manager CLI operations.

**IMPORTANT:** You must restart your application server after you complete Configuration Manager CLI operations.

## 8.2. Command Line Interface property file

The Configuration Manager CLI requires two property files containing the defined properties for your AEM Forms on JEE environment. The templates for the properties files, `cli_propertyFile_template.txt` and `cli_propertyFile_upgrade_template.txt`, are located in the `[aem-forms root]/configurationManager/bin` folder.

- `cli_propertyFile_template.txt` file contains properties that apply to AEM Forms on JEE installation and configuration scenarios, in general.
- `cli_propertyFile_upgrade_template.txt` file contains properties specific to upgrading tasks. Both are required for upgrading from a previous version of AEM Forms on JEE.

Create copies of these files and edit the values. You should create the property file according to your installation. Use one of the following methods.

- Copy the property files `cli_propertyFile_template.txt` and `cli_propertyFile_upgrade_template.txt` to use these as a template and edit the values based on the Configuration Manager operations you intend to use.
- Use the GUI of the Configuration Manager and then use the property file created by the GUI version as the CLI version property file. When you run the `[aem-forms root]/configurationManager/bin/ConfigurationManager.bat/sh` file, the `userValuesForCLI.properties` file is created in the `[aem-forms root]/configurationManager/config` directory. You can use this file as input for the Configuration Manager CLI.

**NOTE:** The file does not contain the properties listed below, which are optional. If required, you can manually add these properties to the file:

- `ApplicationServerRestartRequired`
- `lcGdsLocation`
- `lcPrevGdsLocation`

**NOTE:** In the CLI properties file, you must use the escape character (`\`) for Windows paths directory separator (`\`). For example, if the Fonts folder to be mentioned is `C:\Windows\Fonts`, in the Configuration Manager CLI script, you should enter it as `C:\\Windows\\Fonts`.

**NOTE:** The following modules depend on ALC-LFS-ContentRepository. If you are using the `cli_propertyFile_template.txt` as template then either remove the ALC-LFS-ContentRepository from `excludedSolutionComponents` list or add the following LFS in `excludedSolutionComponents` list:

- `ALC-LFS-ProcessManagement`
- `ALC-LFS-CorrespondenceManagement`
- `ALC-LFS-ContentRepository`
- `ALC-LFS-MobileForms`
- `ALC-LFS_FormsManager`

## 8.3. Upgrading AEM Forms on JEE Commands

## (Turnkey and Partial Turnkey only) Shutdown command for JBoss for previous LiveCycle version

**NOTE:** This command would run only if your AEM Forms on JEE Turnkey installation and your previous Turnkey installation coexist on the same machine and you have chosen to perform an upgrade installation while installing AEM Forms on JEE in Turnkey mode.

The `upgrade-shutdownPreviousJboss` command shuts down the JBoss service installed with your previous LiveCycle turnkey or partial turnkey installation and sets the service run mode to 'manual'.

This command requires no properties.

## Update AEM Forms on JEE core settings command

The `upgrade-configureCoreSettings` command updates various core settings for AEM Forms on JEE. For example, if in your previous LiveCycle system you had the Global Document Storage (GDS) directory set at `C:\LC\GDS` and in AEM Forms on JEE you plan to set it to `E:\DS\GDS`, then the new location is not updated in the database unless this CLI command is executed. Other core settings that can be updated in the same manner are: Adobe server fonts directory, Customer fonts directory, System fonts directory, Enable FIPS, AEM Forms on JEE temp directory, AEM Forms on JEE global document storage directory. The following properties are available for the `upgrade-configureCoreSettings` command.

Property	Description	Required	Can be empty
<code>prevLCVersion</code>	The version of AEM Forms on JEE from which upgrade is being performed. Valid values are 6.3 or 6.4	Yes	No
<code>excludedSolutionComponents</code>	Comma separated list of modules not being upgraded/installed. This is equivalent to deselecting installed/licensed solution components in the Configuration Manager GUI.	No	Yes

## (Turnkey Only) Migrate existing turnkey database command

The `upgrade-migrateTurnkeyDatabase` command is used to migrate data from 'adobe' schema of a previous LiveCycle Turnkey MySQL installation to 'adobe' schema of AEM Forms on JEE Turnkey MySQL installation. Before you run this command, make sure that both the MySQL services are running

and are accessible. Also, both the MySQL services should be running on different ports. The following properties are available for the `upgrade-migrateTurnkeyDatabase` command.

**NOTE:** This command would run only if your AEM Forms on JEE Turnkey installation and your previous Turnkey installation coexist on the same machine and you'd chosen to perform an upgrade installation while installing AEM Forms on JEE Turnkey.

Property	Description	Required	Can be empty
<code>lcDatabaseHostName</code>	Hostname for AEM Forms on JEE turnkey database.	Yes	No
<code>lcDatabaseName</code>	Database name for AEM Forms on JEE turnkey database. Default is adobe.	Yes	No
<code>lcDatabaseUserName</code>	Username for accessing AEM Forms on JEE turnkey database.	Yes	No
<code>lcDatabaseUserPassword</code>	Password for accessing AEM Forms on JEE turnkey database. If you don't provide a password in the file, you will prompted to provide it on command line	No	Yes
<code>lcDatabaseDriverFile</code>	Path to driver file for AEM Forms on JEE turnkey database.	Yes	No
<code>lcDatabasePortNumber</code>	Port used by AEM Forms on JEE turnkey database.	Yes	No
<code>lcDatabaseType</code>	Type of database configured for AEM Forms on JEE turnkey database. Default is mysql.	Yes	No
<code>lcPrevDatabaseHostName</code>	Hostname for previous AEM Forms on JEE turnkey database.	Yes	No

Property	Description	Required	Can be empty
lcPrevDatabaseName	Database name for previous AEM Forms on JEE turnkey database. Default is adobe.	Yes	No
lcPrevDatabaseUserName	Username for accessing previous AEM Forms on JEE turnkey database.	Yes	No
lcPrevDatabaseUserPassword	Password for accessing previous AEM Forms on JEE turnkey database. If you don't provide a password in the file, you will be prompted to provide it on command line	No	Yes
lcPrevDatabaseDriverFile	Path to driver file for previous AEM Forms on JEE turnkey database.	Yes	No
lcPrevDatabasePortNumber	The port used by previous AEM Forms on JEE turnkey database.	Yes	No
lcPrevDatabaseType	Type of database configured for previous AEM Forms on JEE turnkey database. Default is mysql.	Yes	No

## Post-deployment Configuration command

The `upgrade-configurePostDeploy` command does the actual upgrade of the system and is run after AEM Forms on JEE EAR files and modules have been deployed.

The following properties are available for the `upgrade-configurePostDeploy` command:

Property	Description	Required	Can be empty
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prevLCVersion	The version of AEM Forms on JEE from which upgrade is being performed. Valid values are 6.3 or 6.4	Yes	No
excludedSolutionComponents	Comma separated list of AEM Forms on JEE components not being installed. This is equivalent to deselecting installed/licensed solution components in the GUI.	No	Yes

**AEM forms on JEE Host and Authorization information**

Property	Description	Required	Can be empty
LCHost	Hostname of the AEM Forms on JEE Server.	Yes	No
LCPort	Port number on which AEM Forms on JEE application server is configured.	Yes	No
localServer.appServerRootDir	This is used to access appserver client JAR files. (Local application server root directory required for WebSphere only)	Yes	Yes
LCAdminUserID	Username of AEM Forms on JEE administrator user	Yes	No
LCAdminPassword	Password for administrator user. If you don't provide a password in the file, you will prompted to provide it on command line	No	Yes

**AEM forms on JEE Database information**

Property	Description	Required	Can be empty
----------	-------------	----------	--------------



lcDatabaseType	Type of database configured for AEM Forms on JEE. Values can be <code>mysql</code> , <code>DB2</code> , <code>oracle</code> , or <code>sqlserver</code>	Yes	No
lcDatabaseHostName	Hostname for the AEM Forms on JEE database.	Yes	No
lcDatabasePortNumber	The port number for the AEM Forms on JEE database.	Yes	No
lcDatabaseDriverFile	Path to driver file for the AEM Forms on JEE database.	Yes	No
lcDatabaseUserName	Username for accessing the AEM Forms on JEE database.	Yes	No
lcDatabaseName	AEM forms on JEE database name. Default is <code>adobe</code> .	Yes	No
lcDatabaseUserPassword	Password for accessing database. If you don't provide a password in the file, you will be prompted to provide it on command line	No	Yes

## 8.4. General configuration properties

### Common properties

Common properties are:

**AEM Forms on JEE Server specific properties:** Required for the Initialize AEM Forms on JEE and Deploy AEM Forms on JEE Components operations.

These properties are required for the following operations:

- Initialize AEM Forms on JEE
- Deploy AEM Forms on JEE components.

Property	Values	Description
<i>AEM Forms on JEE Server specific properties</i>		

Property	Values	Description
LCHost	String	The hostname of the server where AEM Forms on JEE will be deployed. For cluster deployments, hostname of any one of the cluster nodes where the application server is running.
LCPort	Integer	The web port number where AEM Forms on JEE will be deployed.
excludedSolutionComponents	String. Values include: ALC-LFS-Forms, ALC-LFS-ConnectorEMCDocumentum, ALC-LFS-ConnectorIBMFileNet, ALC-LFS-ConnectorIBMContent Manager, ALC-LFS-DigitalSignatures, ALC-LFS-DataCapture, ALC-LFS-Output, ALC-LFS-PDFGenerator, ALC-LFS-ProcessManagement, ALC-LFS-ReaderExtensions, ALC-LFS-RightsManagement ALC-LFS-CorrespondenceManagement, ALC-LFS-ContentRepository, ALC-LFS-MobileForms, ALC-LFS_FormsManager	(Optional) List the AEM Forms on JEE modules you do not want to configure. Specify the excluded modules in a comma separated list.
CRX Content repository The following properties are specified in the <code>cli_propertyFile_crx_template.txt</code> file.	true: false:	
contentRepository.rootDir		Path of the CRX repository.
is.new.installation.of.crx.repository	true: to create a new repository false: to upgrade an existing repository	If the content repository did not exist before upgrade and you have installed the Content Repository for the very first time then set the value to true.

Property	Values	Description
use.crx3.mongo	true: false:	If you have performed a fresh installation, to use Mongo DB with CRX3 set value to true. If the value is false CRX3 TAR is configured.
mongo.db.uri	<URI of Mongo DB>	If you are using Mongo DB, set URI of Mongo DB
mongo.db.name	<name of Mongo DB>	If you are using Mongo DB, provide name of Mongo DB instance
use.crx3.rdb.mk	true: false:	When the value of this property is true, the CRX repository is configured with RDB MK. The default value is false where the repository is configured as CRX3 TAR.

### Configure AEM Forms on JEE properties

These properties only apply to the configure AEM Forms on JEE operation.

Property	Values	Description
AdobeFontsDir	String	Location of the Adobe server fonts directory. This path must be accessible from the server being deployed to. This path must be accessible from all cluster nodes being deployed to.
customerFontsDir	String	Location of the customer fonts directory. This path must be accessible from the server being deployed to. This path must be accessible from all cluster nodes being deployed to.

Property	Values	Description
systemFontsDir	String	Location of the system fonts directory. This path must be accessible from the server being deployed to. This path must be accessible from all cluster nodes being deployed to.
LCTempDir	String	Location of the temporary directory. This path must be accessible from the server being deployed to. This path must be accessible from all cluster nodes being deployed to.
LCGlobalDocStorageDir	String	The global document storage root directory. Specify a path to an NFS shared directory used to store long-lived documents and to share them among all cluster nodes. This path must be accessible from the server being deployed to. This path must be accessible from all cluster nodes being deployed to.
EnableDocumentDBStorage	true or false Default: false	Enables or disables document storage in database for persistent documents. Even if you enable document storage in database, you will need the file system directory for GDS.

## Configure or validate application server properties

## Configure JBoss properties

Use the Adobe pre-configured JBoss provided on the AEM Forms on JEE DVD, download from the internet, or use the JBoss turnkey option.

## Initialize AEM Forms on JEE properties

These initialize AEM Forms on JEE properties only apply to the initialize AEM Forms on JEE operation.

Property	Values	Description
<i>For more information, see <a href="#">Common properties</a>.</i>		

## Deploy AEM Forms on JEE Components properties

These properties apply to the following operations:

- Deploy AEM Forms on JEE Components
- Validate AEM Forms on JEE Component Deployment
- Validate AEM Forms on JEE Server.

Property	Values	Description
<i>You must configure the AEM Forms on JEE Server Information section. For more information, see <a href="#">Common properties</a></i>		
LCAdminUserID	String	The user ID to assign to the AEM Forms on JEE Administrator user. This User ID is used to login to the Administrator Console.
LCAdminPassword	String	The password to assign to the AEM Forms on JEE Administrator user. This password is used to login to the Administrator Console.

## Add administrator user for PDF Generator

These properties apply only to the adding administrator user for PDF Generator operation. These properties are present in cli\_propertyFile\_pdfg\_template.txt

Property	Values	Description
LCHost	String	Hostname where AEM Forms on JEE Server is installed.
LCPort	Integer	Port number where AEM Forms on JEE application server is configured
LCAdminUserID	String	The user ID to assign to the AEM Forms on JEE Administrator user. This User ID is used to login to the Administrator Console.
LCAdminPassword	String	The password to assign to the AEM Forms on JEE Administrator user. This password is used to login to the Administrator Console.
LCServerMachineAdminUser	String	The user ID of the Administrator user of the Operation System hosting AEM forms on JEE
LCServerMachineAdminUserPassword	String	The password of the Administrator user of the Operation System hosting AEM forms on JEE

## Configure Connector for IBM Content Manager

**NOTE:** The following properties are specified in the cli\_propertyFile\_ecm\_ibmcm\_template.txt file.

Property	Values	Description
LCHost	String	Hostname where AEM Forms on JEE Server is installed.
LCPort	Integer	Port number where AEM Forms on JEE application server is configured
LCAdminUserID	String	The user ID to assign to the AEM Forms on JEE Administrator user. This User ID is used to login to the Administrator Console.

Property	Values	Description
LCAdminPassword	String	The password to assign to the AEM Forms on JEE Administrator user. This password is used to login to the Administrator Console.
CDVTopology.appserverrootdir	String	The root directory of the application server instance that you are configuring on a remote server (on which you plan to deploy AEM Forms on JEE)
ConfigureIBMCM	true or false	Specify true to configure Connector for IBM Content Manager
IBMCMClientPathDirectory	String	Location of IBM Content Manager client installation directory.
DataStoreName	String	Name of the DataStore of IBM Content Manager Server that you want to connect to
IBMCMUsername	String	The user name assign to the IBM Content Manager Administrator user. This User ID is used to login to the IBM Content Manager.
IBMCMPassword	String	The password to assign to the IBM Content Manager Administrator user. This password is used to login to the IBM Content Manager.
ConnectionString	String	Additional arguments used in the connection string to connect to IBM Content Manager(Optional).

## Configure Connector for IBM FileNet

**NOTE:** The following properties are specified in the cli\_propertyFile\_ecm\_filenet\_template.txt file.

Property	Values	Description
LCHost	String	Host name of the machine where AEM Forms on JEE Server is installed.
LCPort	Integer	Port number where AEM Forms on JEE application server is configured
LCAdminUserID	String	The user ID to assign to the AEM Forms on JEE Administrator user. This User ID is used to login to the Administrator Console.
LCAdminPassword	String	The password to assign to the AEM Forms on JEE Administrator user. This password is used to login to the Administrator Console.
CDVTopology.appserverrootdir	String	The root directory of the application server instance that you are configuring on a remote server (on which you plan to deploy AEM Forms on JEE)
ConfigureFilenetCE	true or false	Specify true to configure Connector for IBM FileNet
FilenetConfigureCEVersion	String	The FileNet client version to configure. Specify <code>FilenetClientVersion5.2</code>
FilenetCEClientPathDirectory	String	Location of IBM FileNet Content Manager client installation directory.
ContentEngineName	String	Host name or IP address of the machine where IBM FileNet Content Engine is installed
ContentEnginePort	String	The port number used by IBM FileNet Content Engine
CredentialProtectionSchema	CLEAR or SYMMETRIC	Specify the level of protection.



Property	Values	Description
EncryptionFileLocation	String	Location of the encryption file. This is required only when you select SYMMETRIC option for CredentialProtectionSchema attribute. Use a forward slash (/) or double backward slashes (\\) as a path separator.
DefaultObjectStore	String	Name of the ObjectStore for the Connector for IBM FileNet Content Server.
FileNetContentEngineUsername	String	The user ID to connect to the IBM FileNet Content server. The user ID with read-access privileges would be allowed to connect to the Default object Store.
FileNetContentEnginePassword	String	The password to assigned to the IBM FileNet user. This password is used to connect to Default object Store.
ConfigureFileNetPE	true or false	Specify true to configure Connector for IBM FileNet
FileNetPEClientPathDirectory	String	Location of IBM FileNet client installation directory
FileNetProcessEngineHostname	String	Host name or IP address of the process router.
FileNetProcessEnginePortNumber	Integer	Port number for IBM FileNet Content Server
FileNetPERouterURLConnectionPoint	String	Name of the process router.
FileNetProcessEngineUsername	String	The user ID to connect to the IBM FileNet Content Server
FileNetProcessEnginePassword	String	The password to connect to the IBM FileNet Content Server

## Configure Connector for EMC Documentum

**NOTE:** The following properties are specified in the cli\_propertyFile\_ecm\_documentum\_template.txt file.

Property	Values	Description
LCHost	String	Host name where AEM Forms on JEE Server is installed.
LCPort	Integer	Port number where AEM Forms on JEE application server is configured
LCAdminUserID	String	The user ID to assign to the AEM Forms on JEE Administrator user. This User ID is used to login to the Administrator Console.
LCAdminPassword	String	The password to assign to the AEM Forms on JEE Administrator user. This password is used to login to the Administrator Console.
CDVTopology.appserverrootdir	String	The root directory of the application server instance that you are configuring on a remote server (on which you plan to deploy AEM Forms on JEE)
ConfigureDocumentum	true or false	Specify true to configure Connector for EMC Documentum
DocumentumClientVersion	String	The EMC Documentum client version to configure. Specify DocumentumClientVersion
DocumentumClientPathDirectory	String	Location of EMC Documentum client installation directory
ConnectionBrokerHostName	String	Host name or IP address of the EMC Documentum Content Server.
ConnectionBrokerPortNumber	String	Port number for EMC Documentum Content Server

Property	Values	Description
DocumentumUsername	String	The user ID to connect to the EMC Documentum Content Server.
DocumentumPassword	String	The password ID to connect to the EMC Documentum Content Server.
DocumentumDefaultRepositoryName	String	Name of the default repository of MC Documentum Content Server

## Configure Connector for Microsoft SharePoint

**NOTE:** The following properties are specified in the cli\_propertyFile\_ecm\_sharepoint\_template.txt file.

Property	Values	Description
LCHost	String	Host name where AEM Forms on JEE Server is installed.
LCPort	Integer	Port number where AEM Forms on JEE application server is configured
LCAdminUserID	String	The user ID to assign to the AEM Forms on JEE Administrator user. This User ID is used to login to the Administrator Console.
LCAdminPassword	String	The password to assign to the AEM Forms on JEE Administrator user. This password is used to login to the Administrator Console.
CDVTopology.appserverrootdir	String	The root directory of the application server instance that you are configuring on a remote server (on which you plan to deploy AEM Forms on JEE)
ConfigureSharePoint	true or false	Specify true to configure Connector for Microsoft SharePoint

Property	Values	Description
SharePointServerAddress	String	Host name or IP address of the Sharepoint Server
SharePointUsername	String	The user ID to connect to the Sharepoint Server
SharePointPassword	String	The password to connect to the Sharepoint Server
SharePointDomain	String	The Domain Name of the Sharepoint Server
ConnectionString	String	Additional arguments used in the connection string to connect to the Sharepoint Server(optional

## Command Line Interface Usage

Once you have configured your property file, you must navigate to the *[AEM Forms on JEE root]/configurationManager/bin* folder.

To view a complete description of the Configuration Manager CLI commands, type:

```
ConfigurationManagerCLI help <command name>.
```

## Configure CRX CLI Usage

The Configure CRX Repository requires the following syntax:

```
configureCRXRepository -f <propertyFile>
```

## Manually deploy configured EAR files

For detailed instructions to manually deploy configured ear files, see [Deploying to JBoss Application server](#)

## Initialize AEM Forms on JEE CLI Usage

The initialize AEM Forms on JEE operation requires the following syntax:

```
initializeLiveCycle -f <propertyFile>
```

## Validate AEM Forms on JEE Server CLI Usage

The Validate AEM Forms on JEE Server operation is optional and requires the following syntax:

```
validateLiveCycleServer -f <propertyFile> -LCAdminPassword <password>
```

Where:

- `-LCAdminPassword <password>`: Allows you to set the Admin password on the command line. If this argument is present, it will override the `targetServer.adminPassword` property in the property file.

### Deploy AEM Forms on JEE Components CLI Usage

The Deploy AEM Forms on JEE Components operation requires the following syntax:

```
deployLiveCycleComponents -f <propertyFile> -LCAdminPassword <password>
```

### Validate AEM Forms on JEE Component Deployment CLI Usage

The Validate AEM Forms on JEE Component Deployment operation is optional and requires the following syntax:

```
validateLiveCycleComponentDeployment -f <propertyFile> -LCAdminPassword <password>
```

### Check system readiness for PDF Generator

The Checking system readiness for PDF Generator operation requires the following syntax:

```
pdfg-checkSystemReadiness
```

### Adding administrator user for PDF Generator

The adding administrator user for PDF Generator operation requires the following syntax:

```
pdfg-addAdminUser -f <propertyFile>
```

Where:

- `-f <propertyFile>`: A property file containing the required arguments. For more information on creating a property file, see [Command Line Interface property file](#).

### Configure Connector for IBM Content Manager

The Configure Connector for IBM Content Manager operation is optional and requires the following syntax:

```
IBMCM-configurationCLI -f <propertyFile>
```

**IMPORTANT:** Modify the `<propertyFile>` called `cli_propertyFile_ecm_ibmcm_template.txt` located in the `[aem-forms root]\configurationManager\bin\` directory.

- 1) Copy the `adobe-component-ext.properties` file from `[aem-forms root]/configurationManager/configure-ecm/jboss` to the following `[appserver root]` directory.
- 2) Restart the Application Server.
- 3) Start the following services from administration console
  - IBMCMAuthProviderService
  - IBMCMConnectorService

### Configure Connector for IBM FileNet

The Configure Connector for IBM FileNet operation is optional and requires the following syntax:

filenet-configurationCLI -f <propertyFile>

**IMPORTANT:** Modify the <propertyFile> called cli\_propertyFile\_ecm\_filenet\_template.txt located in the [aem-forms root]\configurationManager\bin\ directory.

Perform the following steps manually to complete the configuration for Connector for IBM Content Manager.

- 1) Copy the *adobe-component-ext.properties* file from [aem-forms root]/configurationManager/configure-ecm/jboss to the following [appserver root]/bin directory.
- 2) Locate the lc\_<db>.xml file in the [appserver root]/standalone/configuration folder. In the file search for <security-domains>. Below this tag add and the contents of lc\_turnkey.xml file available in [aem-forms root]/configurationManager/configure-ecm/jboss directory.  
*Default jboss setup comes up with a [profile] value as "all". However, for Adobe Configured Jboss use [lc\_DatabaseName] (e.g. lc\_mysql, lc\_oracle).*
- 3) Restart the Application Server.
- 4) Start the following services from administration console
  - IBMFileNetAuthProviderService
  - IBMFileNetContentRepositoryConnector
  - IBMFileNetRepositoryProvider
  - IBMFileNetProcessEngineConnector(If configured)

### Configure Connector for EMC Documentum

The Configure Connector for EMC Documentum operation is optional and requires the following syntax:

documentum-configurationCLI -f <propertyFile>

**IMPORTANT:** Modify the <propertyFile> called cli\_propertyFile\_ecm\_documentum\_template.txt located in the [aem-forms root]\configurationManager\bin\ directory.

Perform the following steps manually to complete the configuration for Connector for EMC Documentum.

- 1) Copy the *adobe-component-ext.properties* file from [aem-forms root]/configurationManager/configure-ecm/jboss to the following [appserver root]/bin directory.
- 2) Restart the Application Server.
- 3) Start the following services from administration console
  - EMCDocumentumAuthProviderService
  - EMCDocumentumRepositoryProvider
  - EMCDocumentumContentRepositoryConnector

### Configure Connector for Microsoft SharePoint

The Configure Connector for Microsoft SharePoint operation is optional and requires the following syntax:

sharepoint-configurationCLI -f <propertyFile>

Where:

**IMPORTANT:** Modify the <propertyFile> called `cli_propertyFile_ecm_sharepoint_template.txt` located in the `[aem-forms root]\configurationManager\bin\` directory.

## 8.5. Examples Usage

From the `C:\Adobe\Adobe_Experience_Manager_Forms\configurationManager\bin`, type:

```
ConfigurationManagerCLI configureLiveCycle -f cli_propertyFile.txt
```

Where `cli_propertyFile.txt` is the name of the property file you created.

## 8.6. Configuration Manager CLI Logs

If an error occurs, you can review the CLI logs located here in the `[aem-forms root]\configurationManager\log` folder. The log file generated will have a naming convention such as `lcmCLI.0.log` where the number in the filename (0) will increment when the log files are rolled over.

## 8.7. Next steps

If you used Configuration Manager CLI to configure and deploy AEM Forms on JEE, then do the following tasks now:

- [UpgradetheCRXrepositoryandmigratethecontent](#)
- Perform post deployment configurations

## 9. Appendix - Configuring JBoss as a Windows Service

This appendix describes how you can configure the JBoss application server to run as a Windows service. Use this procedure on Windows Server 2016 64-bit version.

### 9.1. Update name of JBoss services

- 1) Create the following system environment variables:

Variable Name	Value
JBOSS_HOME	<Path of the application server root>
NOPAUSE	1

- 2) Open the [appserver root]/bin/service.bat file in a text editor and update the variables.

*You should update the variables for Service Name (SHORTNAME) Service Display (DISPLAYNAME) and Service Description (DESCRIPTION) with values that reflect your JBoss environment. For example:*

```
set SHORTNAME=JBoss_FOR_Adobe_Experience_Manager_FORMS
set DISPLAYNAME="JBoss for Adobe Experience Manager Forms"
set DESCRIPTION="JBoss for Adobe Experience Manager Forms"
```

- 3) (Only when upgrading on cluster) On the master node, open the [appserver root]/bin/service.bat file in a text editor and update the following:

```
Modify "if /I "%IS_DOMAIN%" == "true" ( if "%BASE%"==" set
"BASE=%JBoss_HOME%\standalone" if "%CONFIG%"==" set
CONFIG=lc_turnkey.xml if "%START_SCRIPT%"==" set
START_SCRIPT=standalone.bat) " to
** " if /I "%IS_DOMAIN%" == "true" ( if "%BASE%"==" set
"BASE=%JBoss_HOME%\domain" if "%CONFIG%"==" set
CONFIG=domain_<db>.xml if "%START_SCRIPT%"==" set
START_SCRIPT=domain.bat) **
```

- 4) Save and close the file.

### 9.2. Install the Windows service

- 1) From the \bin folder of JBoss, create the Windows service using the following command:

**(On single server):** `service.bat install /loglevel INFO`



**(On cluster):**

*For master machine: `service.bat install /host <master machine IP or hostname>`*

*For slave machine: `service.bat install /host <slave machine IP or hostname>`*

*If the command is successful, you will return command prompt without failure.*

- 2) Check the Services applet in Windows Control Panel for a new service listed as *JBoss for Adobe Experience Manager forms* which is the value of the `DISPLAYNAME` variable in the `service.bat` file.
- 3) Using the Services applet in Windows Control Panel, set the *Startup type* to `Automatic`.
- 4) (Optional) In the *Recovery* tab, set the *First failure* and *Second failure* recovery options such as *Restart the Service* and *Restart the Computer* respectively.

**NOTE:** If necessary, you can change the Logon as value from the default Local System account to another user or service account.

## 9.3. Start and stop JBoss Application Server as a Windows service

### Start JBoss as a Windows service

- 1) On the Windows server, select **Start > Control Panel > Administrative Tools > Services**, then select the Windows service for JBoss Application Server and click **Start**.

**NOTE: (On single server)** When starting JBoss Application Server as a Windows service, the console output is redirected to the file

`jboss_for_adobe_experience_manager_forms-stderr.<date>.log` and  
`jboss_for_adobe_experience_manager_forms-stdout.<date>.log` at  
`<JBOSS_HOME>\standalone\log`

**NOTE: (On cluster)** When starting JBoss Application Server as a Windows service, the console output is redirected to the file

`jboss_for_adobe_experience_manager_forms-stderr.<date>.log` and  
`jboss_for_adobe_experience_manager_forms-stdout.<date>.log` at  
`<JBOSS_HOME>\domain\log`

*You can inspect the file to discover any errors that occur during service startup.*

### Stop JBoss as a Windows service

- 1) On the Windows server, select **Start > Control Panel > Administrative Tools > Services**, then select the Windows service for JBoss Application Server and click **Stop**.

**NOTE: (On single server)** When stopping JBoss Application Server as a Windows service, the console output is redirected to the file

`jboss_for_adobe_experience_manager_forms-stderr.<date>.log` and  
`jboss_for_adobe_experience_manager_forms-stdout.<date>.log` at  
`<JBOSS_HOME>\standalone\log`

**NOTE: (On cluster)** When stopping JBoss Application Server as a Windows service, the console output is redirected to the file

`jboss_for_adobe_experience_manager_forms-stderr.<date>.log` and  
`jboss_for_adobe_experience_manager_forms-stdout.<date>.log` at  
`<JBOSS_HOME>\domain\log`

*You can inspect the file to discover any errors that occur during service shutdown.*

## 9.4. Verify the installation

- 1) Start the service from the Services applet in Windows Control Panel.
- 2) Watch (tail) the `[appserver root]\standalone\log\server.log` file to make sure that the service starts successfully.
- 3) Shutdown the service from the Services applet in Windows Control Panel and verify that it is shut down successfully.
- 4) Make sure that you are able to restart the service from the Services applet in Windows Control Panel.

## 9.5. Additional configuration

In addition to these steps, you can also perform additional configuration steps using either the Services applet in Windows Control Panel or by using the built-in Windows Service Configuration utility (`sc`).

For example, if you have a Microsoft SQL Server as the database, and the database service runs on the same machine instance, you can create a dependency on that service with the following command:

```
sc config JBOSS_FOR_Adobe_Experience_Manager_FORMS depend= MSSQL$MYSERVER
```

Update the `MSSQL$MYSERVER` variable with service name of the Microsoft SQL Server 2016 service running on the same server instance.

**NOTE:** Ensure that there is no space before the `=sign` but after the `=sign`.

If the command is successful, you will get a response such as follows:

```
[SC] ChangeServiceConfig SUCCESS
```

# 10. Appendix - Configuring the Connector for Microsoft SharePoint on the SharePoint Server

The Connector for Microsoft SharePoint allows you to integrate workflows from both the AEM Forms on JEE and the SharePoint development perspectives. This module includes a AEM Forms on JEE service and a sample SharePoint feature that facilitates end-to-end connection between the two systems.

The service provides search, read, write, delete, update, and check in/out capabilities with a SharePoint repository. SharePoint users can initiate AEM Forms on JEE processes such as an approval process from within SharePoint, convert documents to Adobe PDF, and manage the rights on a file in PDF or native formats. In addition, from within the SharePoint context, you can automate running AEM Forms on JEE processes from within SharePoint workflows.

## 10.1. Installation and configuration

After you configured the AEM Forms on JEE installation, carry out the following steps to configure the connector on the SharePoint server.

### System requirements for the SharePoint server

Ensure that your server that runs the SharePoint site meets the following requirements:

- Microsoft SharePoint Server
- Microsoft .NET Framework 3.5

### Installation considerations

Keep in mind the following, before you plan your installation:

- Before you run the installation, ensure that no other sites or web applications are using services on the IIS Server. Consult with your IIS Administrator before you proceed with the installation.
- (For Sharepoint server Farmed installation) The SharePoint administration service is running on the central administration server of the SharePoint server Farm. (For SharePoint server standalone installation) The SharePoint administration service is stopped on the SharePoint server.

## 10.2. Installation and configuration on the SharePoint server

## Edit Environment Variables

Append path of stsadm.exe to PATH environment variable. The default path of stsadm.exe is  
C:\Program Files\Common Files\MicrosoftShared\Web Server  
Extensions\14\BIN.

## Extract the web part installer

When you installed the AEM Forms on JEE server, the web part installer for SharePoint server files named Adobe Connector-2016.zip are created in the [aem-forms root]\plugins\sharepoint folder.

- If you are using Microsoft SharePoint 2016, copy file Adobe Connector-2016.zip to a folder on the Windows server that hosts SharePoint, and then extract the copied file.

## Install and Activate the Connector

- 1) (Optional) Select options for SharePoint Server Context menu before installing connector. See [Enable/Disable features](#) for detailed steps.
- 2) Run following commands in the listed order to install the Connector for SharePoint Server. Ensure that you run stsadm - o enumsolutions after each command to verify that the changes have been the propagated to all the servers.

*Run stsadm - o enumsolutions repeatedly, until the resultant xml contains  
<state>pending</state> tag.*

```
install.bat -create  
install.bat -add  
install.bat -deploy  
install.bat -install
```

**NOTE:** For the install.bat -deploy command, run stsadm - o enumsolutions repeatedly, until the resultant xml contains <LastOperationResult>DeploymentSucceeded</LastOperationResult> tag.

- 3) Activate the connector from SharePoint Web Application. To activate the connector:
  - a) Open SharePoint Web Application in a browser.
  - b) Click **Site Settings**.
  - c) Click **Site Collection Features**.
  - d) Click Activate for **Adobe Connector** and **Workflow** feature.

## Enable/Disable features

You can change options of context menu and disable other features on SharePoint Sites. For the Sharepoint Connector installed with default set of options, following options are enabled on SharePoint Server:

- Convert to Adobe PDF
- Enable for commenting by adobe reader.
- Secure with Adobe Policy.

- Invoke AEM Forms on JEE Processes

You may make changes to `Elements.xml` file to change above options and to enable or disable another features. To make changes to `Elements.xml`

- 1) Navigate to the folder containing extracted contents of `Adobe Connector-2016.zip` file.
- 2) Take backup of `Elements.xml` file. The default location of `Elements.xml` is < Directory containing Extracted Adobe Connector-2016.zip File >  
`>\TEMPLATE\FEATURES\LiveCycle\Elements.xml`
- 3) Open the `Elements.xml` file in a text editor.
- 4) Delete or comment the `CustomAction` elements of features that you want to disable .

Docuent Server feature	CustomAction element ID	Description
ReaderExtens ions	LiveCycle.ApplyReaderExtensions	Enables Acrobat Reader DC extensions on PDF documents.
Rights Management	LiveCycle.RightsManagement.ApplyPo licyToPdf	Rights-protect PDF documents
	LiveCycle.RightsManagement.ApplyPo licyToDoc	Rights-protect Microsoft Word documents
	LiveCycle.RightsManagement.ApplyPo licyToXls	Rights-protect Microsoft Excel documents
	LiveCycle.RightsManagement.ApplyPo licyToPpt	Rights-protect Microsoft PowerPoint documents
	LiveCycle.RightsManagement.ApplyPo licyToDocx	Rights-protect Microsoft Word documents
	LiveCycle.RightsManagement.ApplyPo licyToXlsx	Rights-protect Microsoft Excel documents
	LiveCycle.RightsManagement.ApplyPo licyToPptx	Rights-protect Microsoft PowerPoint documents
	LiveCycle.RightsManagement.ApplyPo licyToDwg	Rights-protect Microsoft Excel documents
	LiveCycle.RightsManagement.ApplyPo licyToDxf	Rights-protect AutoCAD documents
	LiveCycle.RightsManagement.ApplyPo licyToDwf	Rights-protect AutoCAD documents

PDF Generator	LiveCycle.GeneratePDFFromPdf	Convert a PDF created from an image to a text-based PDF if Standard OCR was used? as the file type in Site Settings.
	LiveCycle.GeneratePDFFromDoc	Generate PDF from Microsoft Word documents
	LiveCycle.GeneratePDFFromPs	Generate PDF from PostScript files
	LiveCycle.GeneratePDFFromEps	Generate PDF from EPS documents
	LiveCycle.GeneratePDFFromPrn	Generate PDF from PRN files
	LiveCycle.GeneratePDFFromDocx	Generate PDF from Microsoft Word documents
	LiveCycle.GeneratePDFFromPpt	Generate PDF from Microsoft PowerPoint documents
	LiveCycle.GeneratePDFFromPptx	Generate PDF from Microsoft PowerPoint documents
	LiveCycle.GeneratePDFFromXls	Generate PDF from Microsoft Excel documents
	LiveCycle.GeneratePDFFromXlsx	Generate PDF from Microsoft Excel documents
	LiveCycle.GeneratePDFFromBmp	Generate PDF from BMP files
	LiveCycle.GeneratePDFFromGif	Generate PDF from GIF files
	LiveCycle.GeneratePDFFromJpeg	Generate PDF from JPEG images
	LiveCycle.GeneratePDFFromJpg	Generate PDF from JPG images
	LiveCycle.GeneratePDFFromTiff	Generate PDF from TIFF images
	LiveCycle.GeneratePDFFromTif	Generate PDF from TIF images
	LiveCycle.GeneratePDFFromPng	Generate PDF from PNG images
	LiveCycle.GeneratePDFFromJpf	Generate PDF from JPF images
	LiveCycle.GeneratePDFFromJpx	Generate PDF from JPX images
	LiveCycle.GeneratePDFFromJp2	Generate PDF from JPEG 2000 images
	LiveCycle.GeneratePDFFromJ2k	Generate PDF from JPEG 2000 images
	LiveCycle.GeneratePDFFromJ2c	Generate PDF from JPEG 2000 images
	LiveCycle.GeneratePDFFromJpc	Generate PDF from JPEG 2000 images

	LiveCycle.GeneratePDFFFromHtm	Generate PDF from HTM documents
	LiveCycle.GeneratePDFFFromHtml	Generate PDF from HTML documents
	(Deprecated) LiveCycle.GeneratePDFFFromSwf	(Deprecated) Generate PDF from SWF files
	LiveCycle.GeneratePDFFFromFlv	Generate PDF from Flash video files
	LiveCycle.GeneratePDFFFromTxt	Generate PDF from text files
	LiveCycle.GeneratePDFFFromRtf	Generate PDF from Rich Text Format files
	LiveCycle.GeneratePDFFFromMpp	Generate PDF from Microsoft Project files
	LiveCycle.GeneratePDFFFromPub	Generate PDF from Microsoft Publisher?documents
Invoke LiveCycle process	LiveCycle.InvokeGenericLiveCycleProcessOnALL	Invoke LiveCycle Process
Adobe Forms Library	AdobeFormsLibrary	Set up SharePoint as the repository for forms data.Remove the CustomAction, ListTemplate and ListInstance elements.
AEM Forms user Tasks	LiveCycleUserTasks	Lists the user tasks.Remove the ListTemplate element.
LiveCycle Group Tasks	LiveCycleGroupTasks	Lists the group tasks.Remove the ListTemplate element.

5) Save and close `Elements.xml`

## Uninstalling Connector for Microsoft SharePoint Server

- 1) Deactivate SharePoint Connector from Shrepoint Web Application. To deactivate SharePoint Connector
  - a) Open SharePoint Web Application in a browser.
  - b) Click **Site Settings**.
  - c) Click **Site Collection Features**.
  - d) Click Deactivate for **Adobe Connector** and **Adobe LiveCycle Workflow** Features.
- 2) On the command prompt, run the following commands in the given order. Ensure that you run `stsadm - o enumsolutions` after each command to verify that the changes have been the

propagated to all the servers. Run `stsadm - o enumsolutions` repeatedly, until the resultant xml contains `<state>pending</state>` tag.

```
Install.bat -uninstall
```

```
Install.bat -retract
```

```
Install.bat -delete
```

**NOTE:** For the `Install.bat -retract` command, run `stsadm - o enumsolutions` repeatedly, until the resultant xml contains `<LastOperationResult>RetractionSucceeded</LastOperationResult>` tag.