

EXPENSE REPORT DEPLOYMENT GUIDE

OVERVIEW

This document details how to deploy the Expense Report form to your O365 site. You must follow the instructions in this document before you can run the training labs.

BEFORE YOU START

The FormsViewer app is ready to use in your SharePoint environment, either because you have uploaded its .app file to your app catalog, or obtained it from the SharePoint store.

You are using an account that is a Site Collection Administrator in the site where you plan to use FormsViewer. You must be a Site Collection Administrator in order to upload and manage form templates.

In this training, we will have the following files for the Expense Report Form:

.stp files (STP 2013 folder):

- Expense Reports.stp (*Library*)
- Expense Report.stp (*Parent List*)
- Expense List Items.stp (*Child List*)
- Resources (*List*)

.xsn file:

- Expense Report - Start.xsn

CREATE LIBRARY/LISTS USING THE TEMPLATE FILES

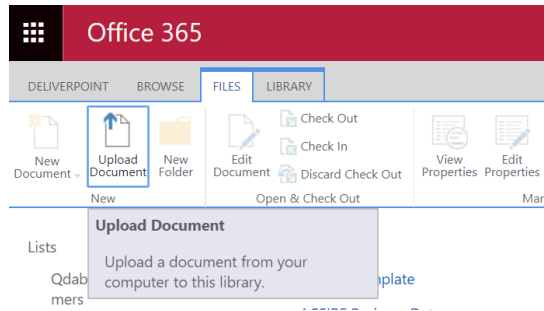
1. Navigate to the **Site settings** of your SharePoint root site.
2. Under **Web Designer Galleries**, click **List templates**.

Site Settings

Users and Permissions
People and groups
Site permissions
Access requests and invitations
Site collection administrators
Site app permissions

Web Designer Galleries
Site columns
Site content types
Web parts
List templates
Master pages and page layouts
Themes
Solutions
Composed looks

3. Select the **Files** tab and click **Upload Document**.

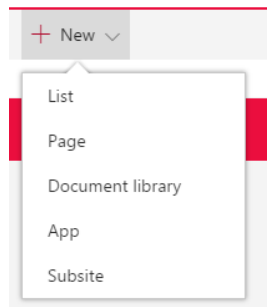


- Browse on the .stp files included in the package and upload these to the site. Leave the file name as it is.

Note: Do not change the naming convention upon uploading.

Name	Edit	Modified	Title
Expense List Items NEW		3/26/2018 5:28 AM	Expense List Items
Expense Report NEW		3/26/2018 5:28 AM	Expense Report
Expense Reports NEW		3/26/2018 5:28 AM	Expense Reports
Resources NEW		3/26/2018 5:28 AM	Resources

- Once the template files are uploaded, click the Gear icon in the header bar and click **Site contents**.
- In the sub-header, click **+ New**, and then click **App**. This should take you to the **Your Apps** page.



- Search for the template file name to add.

Home EDIT LINKS
Site contents ▸ Your Apps

Expense

3 apps match your search

Newest Name



Expense Report
App Details



Expense List Items
App Details



Expense Reports
App Details

Resources

2 apps match your search

Newest



Resources
App Details



Expense Reports
App Details

- Create a custom library/list based off the templates. Copy the name as it is.

Adding Form Library

×

Pick a name

You can add this app multiple times to your site. Give it a unique name.

Name:

Expense Reports

Advanced Options

Create

Cancel

- The Expense Report Library/Lists will be created, and you should have something like this:

Home EDIT LINKS

Expense Reports

+ New Upload Sync Share More ▾

All Documents

My Documents

...

Find a file

🔍

✓

📄

Name

Name

Purpose

Total

Manager Name

Status

Modified

ID

Mgrguid

Appguid

Drag files here to upload

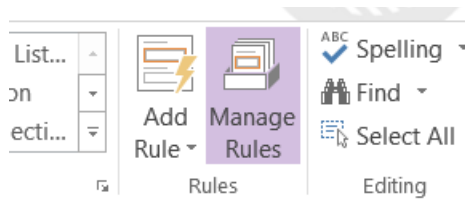
Remember to do these steps for all the four .stp files.

Note: STP files provided are 2013 version. This should work for both SharePoint 2013 and 2016.

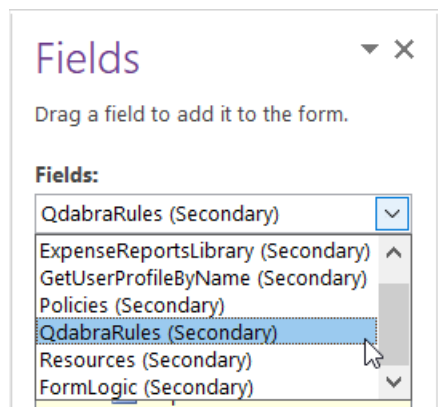
CUSTOMIZE THE INFOPATH FORM TEMPLATE

This section shows how to enter your own SharePoint site in the Expense Report InfoPath form template included in the package.

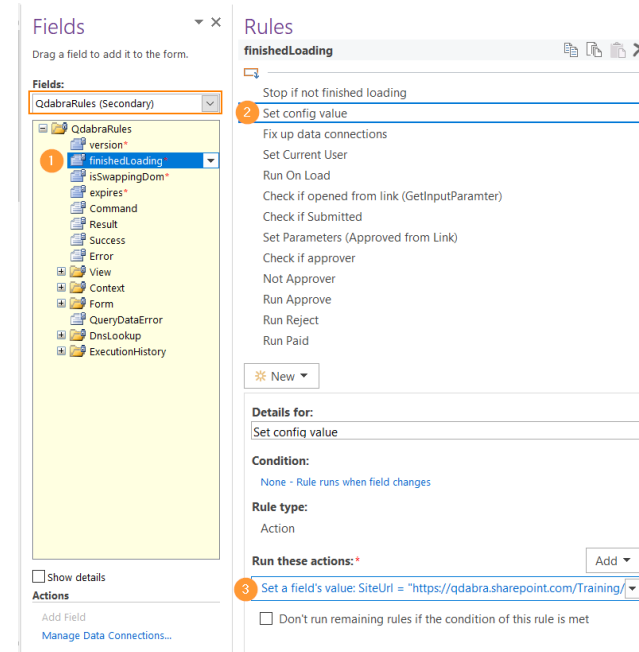
1. Open **Expense Report – Start.xsn** file.
2. Click on **Manage Rules**.



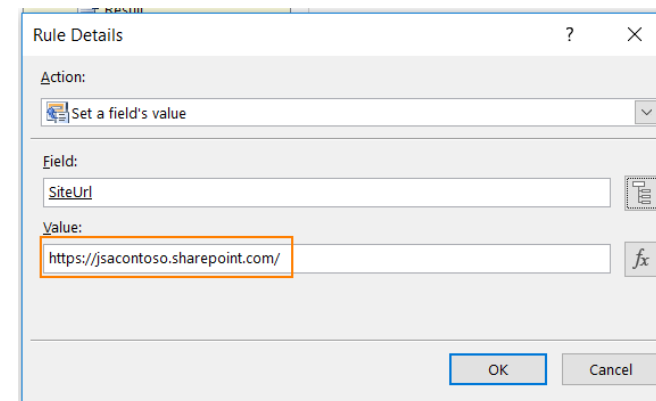
3. Select **QdabraRules** as the active data source.



4. Select field **finishedLoading** > **Set config value** then click on the action below.



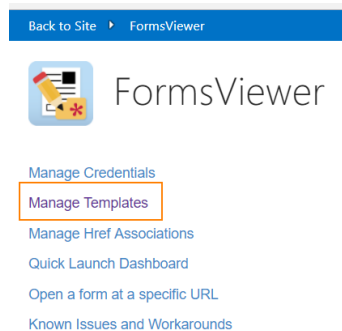
5. Change the value and insert your own SharePoint site.



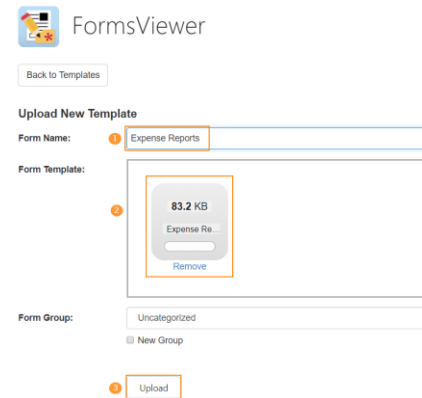
It is **important** to include a slash (/) at the end of the SiteUrl. Examples of SiteUrl:

- <https://TestServer/>
- <https://TestServer/toplevelsite/subsite/>

6. Save the xsn file.
7. We will now upload the new file in FormsViewer. To do this, go to your SharePoint site and click on **Site Contents**, click on **FormsViewer** > **Manage Templates**.



8. Click **Upload a New Template**. Specify the Form Name and upload the **Expense Report – Start.xsn** file you just updated.




Manage Templates

[Upload a New Template](#)

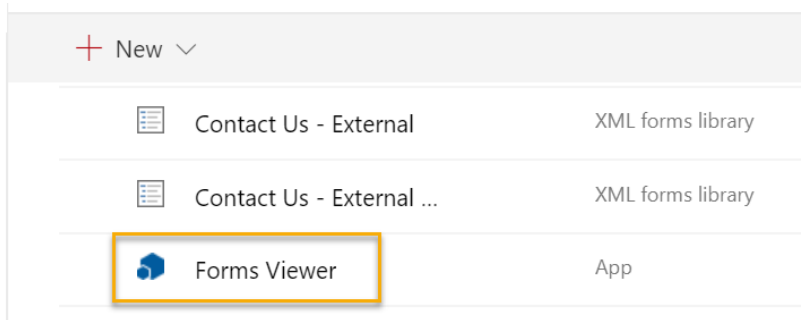
Template Name	Current Version	Open Form Link	Open Form Li
Uncategorized (1)			
Expense Reports	1.0.1.1189	Open	Open

Showing 1 to 1 of 1 entries

CONFIGURE LIBRARY/LISTS TO OPEN LINKS IN FORMSVIEWER

Next, we will configure the library and lists to have links which open in the browser. These are the steps:

1. Locate the ExpenseReports.js file in the package and open in a text editor, such as Notepad.
2. In your browser, go to the site that contains the form library or list you want to use, and click **Site Contents**.
1. Click the FormsViewer icon to open FormsViewer.



2. Once FormsViewer is opened, copy everything after the ? mark in your browser's address bar.
3. Paste the value from step 4 between the single quotation marks on line 3 of ExpenseReports.js. The resulting line should look something like this:
4. Place your template's name between the single quotation marks in line 5 of the file. This template name should match the library template's name from FormsViewer's **Manage Templates** page. The result should look something like this:

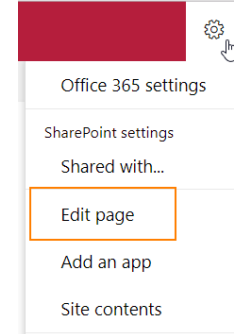
```
// REQUIRED: This is the portion of the URL after the ? when you
var queryString = 'SPHostUrl=https%3A%2F%2Fqdabra%2Esharepoint%2
```

```
// REQUIRED: Specify the name of the temp
var templateName = 'Expense Reports';
```

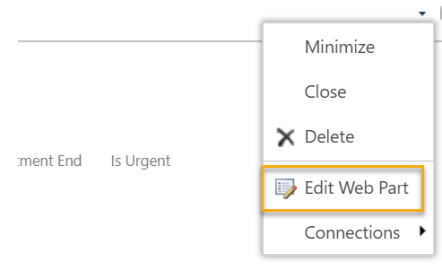
5. Rename the .js file, same name as the template name, only without space. Use the following:

Template Name	.js File Name
Expense Reports (<i>Library</i>)	ExpenseReports.js

6. Login to your SharePoint site, go to the **Style Library** or **Site Assets** for that site and upload the file you have prepared.
7. Navigate to the form library/list.
8. Click the gear icon in the top right and click **Edit Page** (must be in classic SharePoint).



9. Edit the library web part.



10. Expand the **Miscellaneous** section and go to the JS Link property.

+
AJAX Options

+
Miscellaneous

OK
Cancel
Apply

11. For the JS Link property enter the location of the file you uploaded in step 8 depending on where it is located, using a ~site or ~sitecollection placeholder.

For example, if you uploaded the file with the name ExpenseReports.js to the Site Assets library of the site where you want to use it, you can use ~site/SiteAssets/ExpenseReports.js.

JS Link

e/SiteAssets/ExpenseReports.js

OK
Cancel
Apply

Hint: You can use ~sitecollection to refer to the root of the current site collection or ~site to refer to the root of the site.

12. Click **OK** to confirm your changes.

13. In PAGE tab of the ribbon, click **Stop Editing**.

14. Click **+New** and the form should open in the browser.

+ New
Upload
Sync
Share
More

All Documents
My Documents
Find a file

✓
Name
Name
Purpose
Total
Manager Name
Status
Modified
ID
Mgrguid
Apguid

Drag files here to upload

The form will look something like this:

QDABRA SOFTWARE
Policy
Close

Expense Report

NAME
Jo-Anne Alfafara

MANAGER

ACCOUNTING MANAGER
Janice Kutzera

REPORT DATE
3/26/2018

BUSINESS PURPOSE

EXPENSE ITEMS
FROM: TO:

CATEGORY
DATE
DESCRIPTON
MERCHANT
RECEIPT
AMOUNT

+ Select...
Click here to attach a

SUBTOTAL
\$0.00

LESS CASH ADVANCE
\$0.00

TOTAL
\$0.00

Submit