

GETTING STARTED WITH FORMSVIEWER

OVERVIEW

This document details how to install FormsViewer on a SharePoint site, upload a form template and submit a form to a form library.

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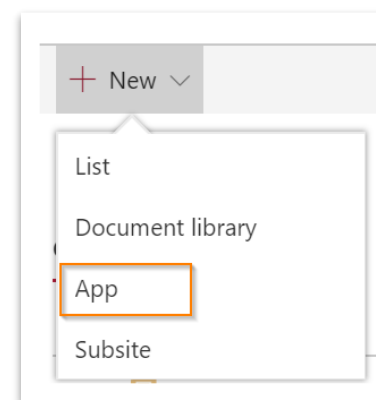
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PREREQUISITES

- 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.

INSTALL THE APP

1. Navigate to the SharePoint site where you would like to install FormsViewer.
2. Click the Gear icon in the header bar and click **Site contents**.
3. In the sub-header of the Site Contents page, click **+New**, and then click **App**. This should take you to the Your Apps page.

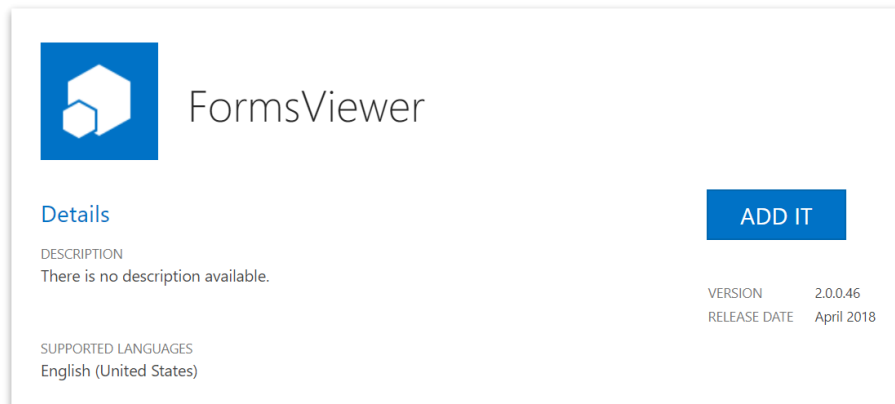


4. Click in the search box, type **FormsViewer**, then press enter.
5. Locate FormsViewer in the search results and click it.

The app name may be slightly different depending on the FormsViewer edition you are installing (e.g. FormsViewer Europe).

NOTE: If you're seeing this message "**You can't add this app here.**", click on **Find out why**. Then, follow the steps in the section **REQUEST FOR APP APPROVAL**.

6. Next, you should see a screen with the app name. Click the **ADD IT** button.

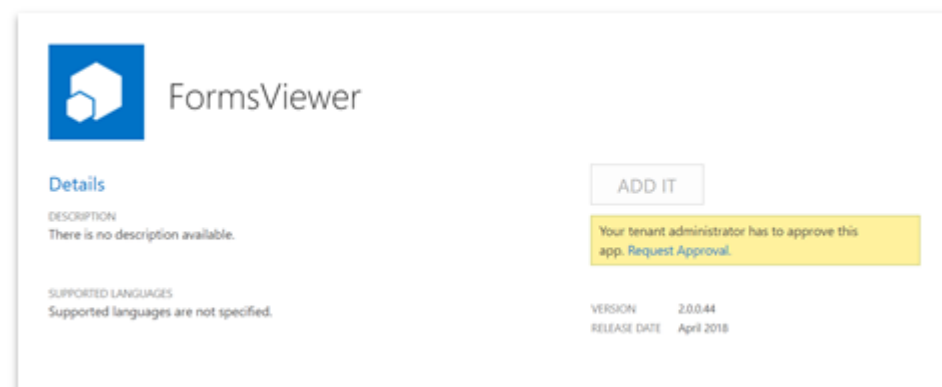


7. Wait for the app to install (this takes about 10 minutes).

REQUEST FOR APP APPROVAL

If the app requires organization-level permissions, the requestor will need approval from an Office 365 admin to continue with the installation.

1. In the App's Details page, click on the **Request Approval** link.



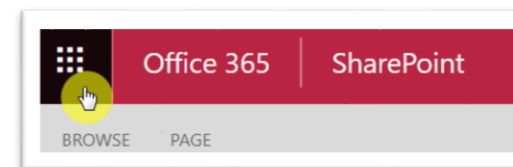
2. Next, add an explanation for the request and click **Request**.

3. Approve the request in the Admin center or ask an admin to do so. (Please see the section **Approving the App Request** for the steps to do this).

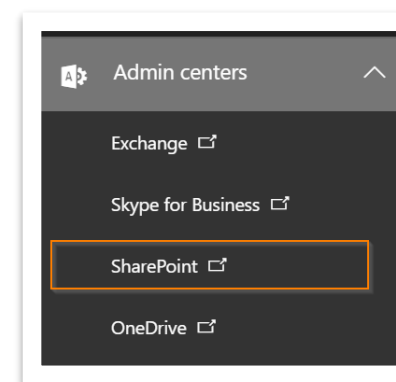
APPROVING THE APP REQUEST

The following steps are intended for site collection admins who can approve or reject an app approval request in the app catalog.

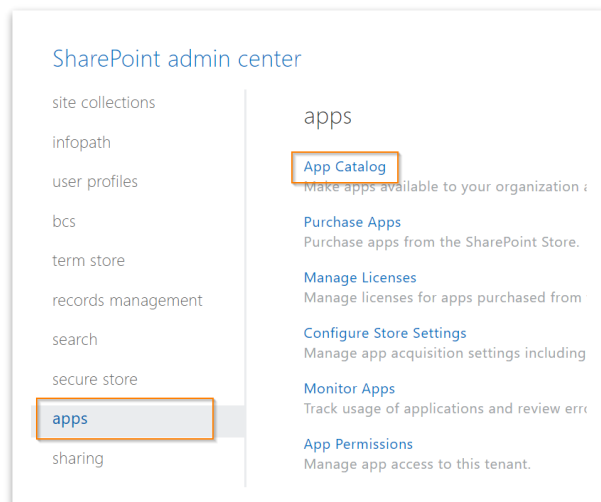
1. Navigate to your SharePoint Online (365) environment and click the menu icon in the top left of the screen:



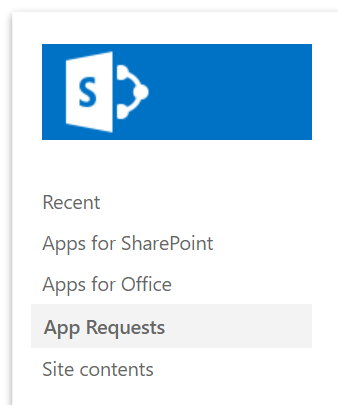
2. Click the Admin tile.
3. In the sidebar, expand **Admin Centers** and click **SharePoint**.



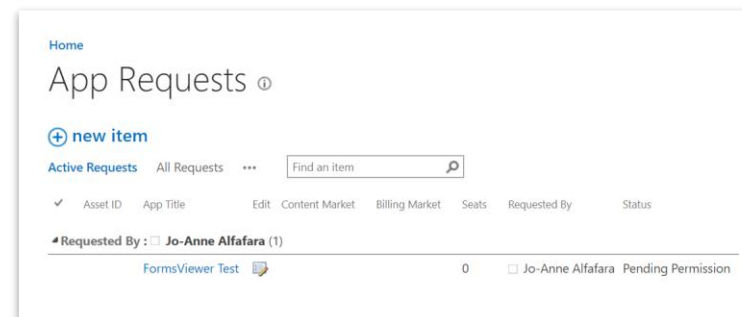
4. Go to **apps** → **App Catalog**.



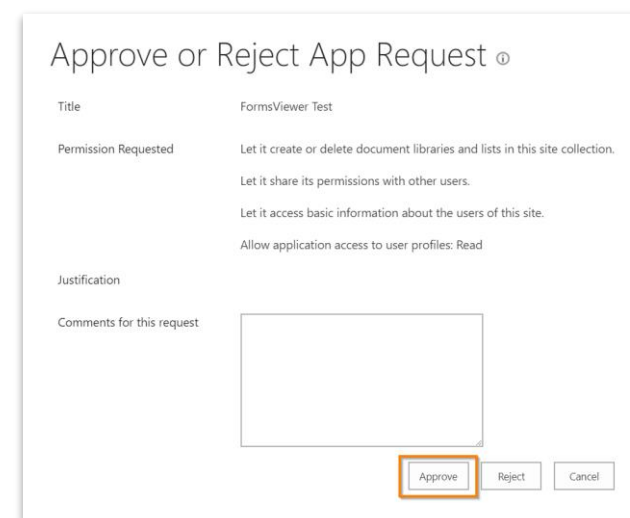
5. Once you have navigated to your **App Catalog**, select the **Apps Requests** option from the side menu.



6. You should see that the FormsViewer app is pending approval.



7. Click on the app's name. This should bring up an **Approve or Reject App Request** screen.

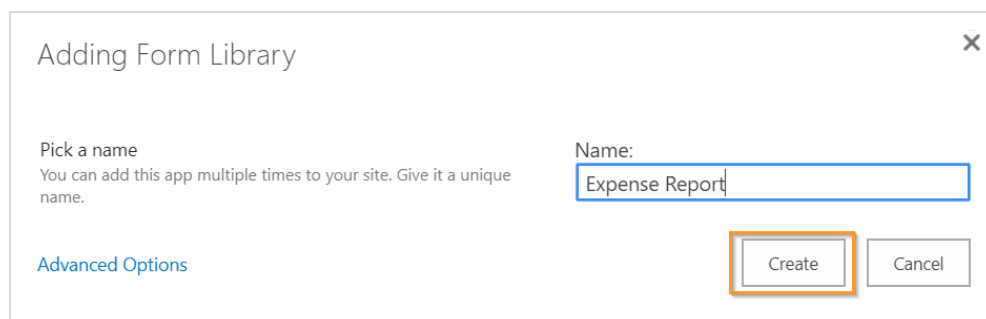


8. Click **Approve**. After the request is approved, you should now be able to add the app to the site. Repeat steps 1-5 from the section **INSTALL THE APP**.

CREATE A FORM LIBRARY

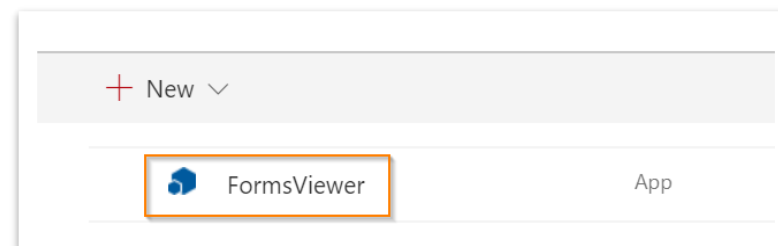
When using the sample Expense Report form that comes with the package, follow the steps below to create a form library to go with it. We will show you later how the form template submits to this library using FormsViewer.

1. Navigate to the SharePoint site where you installed FormsViewer.
2. Click the Gear icon in the header bar and click **Site contents**.
3. In the sub-header of the Site Contents page, click **+New**, and then click **App**. This should take you to the Your Apps page.
4. Click in the search box, type **Form Library**, then press enter.
5. The Form Library app should appear in the search results. Click it.
6. Enter Expense Report as the form library name. For testing purposes, it is required that you use the exact name as shown in the screenshot.
7. Click Create.

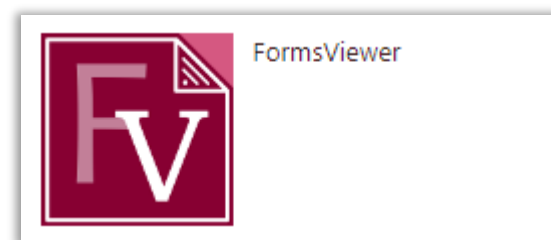


LAUNCH THE FORMSVIEWER APP

1. Again, navigate to the **Site contents** page.
2. Under **Contents**, click on the FormsViewer App.



3. If you're using classic SharePoint, look for the FormsViewer icon similar to the one below and click on it.



4. You will be directed to the FormsViewer start page.

Back to Site ▸ FormsViewer



FormsViewer

Yes, your forms have a future! FormsViewer is the only in-place upgrade path for your InfoPath forms. No lift and shift. Just click **Manage Templates** below and upload your form templates. Use **FormsViewer Extensions** to have your Modern UI SharePoint libraries open forms in FormsViewer. FormsViewer also gives you new features for today's forms. Add a custom stylesheet to make forms look good on mobile. Take advantage of more than 60 qRules commands to extend your forms. Print them as PDFs. Map repeating data to lists. Add glass signature controls. Connect to the latest web services, and much more.

Best of all, Qdabra staff is ready and waiting to take you on a test drive. Just email: support@qdabra.com

Manage Templates
Start here. Upload your existing XSNs and FormsViewer will render them in the browser. No more InfoPath needed. You can also click Design after uploading your form to inject qRules commands and get help with building qRules commands.

Manage Credentials
Connecting to third party web services outside of SharePoint? You can add custom passwords here. For example, if you want to have your form text external users via Twilio, you can add your account here.

Manage Href Associations
If you use multiple InfoPath content types in a form library, you'll need to specify them here so that the forms can open using the correct FormsViewer template.

Quick Launch Dashboard
Do you have a lot of forms and want a quick way to open one to test or debug? Go here and type in the name.

Known Issues and Workarounds
Have an issue? Check here for quick workarounds.

Back to Site ▸ FormsViewer



FormsViewer

← Back To Main

Manage Templates

NOTE: If you do not see the **Manage Credentials** and **Manage Templates** links, please ensure that the account you are using is a *Site Collection Administrator* in the site where you are using the app.

UPLOAD A FORM TEMPLATE

1. Click on **Manage Templates**.
2. Click the **Upload a New Template** button.

5. This will bring up the Upload Template page.
6. Click to browse to the Expense Report.xsn included in this package.
 - a The Form Name should be automatically populated after attaching the file.
7. Click the **Upload** button.

Back to Site ▸ FormsViewer



FormsViewer

Back to Templates

Upload New Template

Form Name: 1

Form Template:

2

0.2 MB
Expense Re...

Remove

Form Group: ▾

☐ New Group

3

Back to Site ▸ FormsViewer



FormsViewer

Your template has been successfully added.

Update *Expense Report*

OPEN THE FORM

1. Click the **Open Form Link**. The Open Form buttons are for opening a new, empty instance of the form. Clicking on this will open an empty instance of the form in a new browser tab.

8. Once the template is uploaded, you'll see a confirmation message that the template has been successfully added. The **Open Form** and **Open Form (anonymous)** buttons appear at the top.

FormsQuo

Expense Report

Contact
Expense
Add Image

Expense Details

Report Date:

Expense Code:

Start Date:

End Date:

Purpose:

Employee Information

Name:

ID Number:

Email Address:

Job Title:

Department:

Manager Information

Manager Name:

Manager Email:

SUBMIT



eForms for your business future
Streamline data gathering to turn process into knowledge

Expense Details

Report Date:

Expense Code:

Start Date:

End Date:

Purpose:

Employee Information

Name:

ID Number:

Email Address:

Job Title:

Department:

Manager Information

Manager Name:

Manager Email:

SUBMIT

- Try out the Expense Report form after filling out the required fields – **Report Date** and **Email Address**, a Submit button will be displayed at the bottom.

- You can also fill in various fields, use the Contact/Expense/Add Image tabs to switch between the form's tabs, add rows to the Expenses table by clicking the Insert Expense text, and so on.
- Click Submit.
- Refresh the form library page and check the XML form that is submitted:

Expense Report

 Name ▾	Modified ▾	Modified By ▾
 John.Smith@Test.com-2018-10-31.xml	A few seconds ago	Jo-Anne Alfafara

You won't be able to reopen the submitted XML documents in the form just yet.

We designed a tool to help you configure SharePoint libraries to open forms in FormsViewer. For more details, go to this [link](#) to download the **FormsViewer Extensions** package.

Here's a quick preview of FormsViewer Extensions – this tool helps you configure which form template open in your form library:

+ New ▾
Send by email
Promote

FormsViewer Extension Config

FormsViewer Extensions Configuration

Library

Expense Report ▾

Fields - Check the fields that should open in FormsViewer

☒ **Select All**

☒ Name (for use in forms)

☒ Name (linked to document)

☒ Name (linked to document with edit menu)

Settings

FormsViewer URL - Open the FormsViewer start page and paste its URL here

<https://formsviewertest.azurewebsites.net/FormsViewer?SPHostUrl=https%3A%2F%2Fqdabra.sharepoint.com%2FSites%2FProductTesting&SPLanguage=en-US&>

Template Name

Expense Report

Apply Changes

MODIFY THE FORM

*This section is optional, and requires having InfoPath Designer installed on the machine you are using.

1. Locate the Expense Report.xsn file in Windows Explorer.
2. Right-click the file and select Design from the context menu. This should open the form in InfoPath designer.
3. Make a minor modification to the form (e.g. modify some of the label text or move some controls around).
4. Save the form template on top of the original ExpenseReport.xsn file.
5. Return to the Upload Template page, browse to the modified XSN, and click **Update**.

Update *Expense Report*

Form Template:

0.2 MB

Expense Re...

Remove

Form Group:

Uncategorized

☐ New Group

Update

Download

Delete this Template

6. When the upload completes, click the **Open Form** button to open the form. You should be able to see that your modifications have taken effect.
7. In case you try to revert to the previous version, FormsViewer will detect that you are uploading a form with a lower version than the current form. To proceed, click the **Upload Anyway** button.

Update *Expense Report*

Form Template:

0.2 MB

Expense Re...

Remove

Form Group:

Uncategorized

☐ New Group

Update

Download

Delete this Template

Your form has a version of 1.0.0.209 which is lower than the current form version 1.0.0.210

Upload Anyway

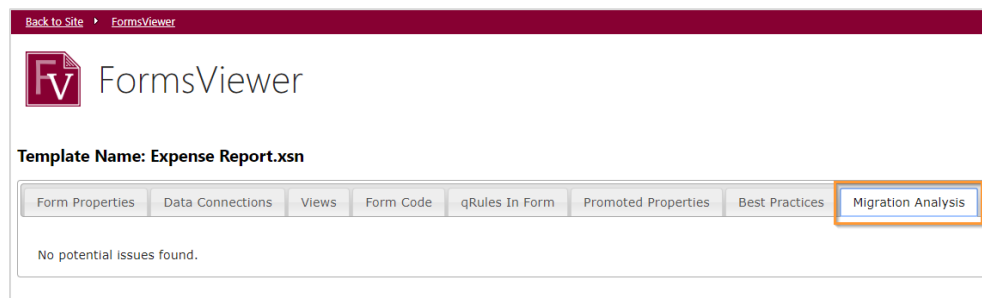
VIEW FORM DIAGNOSTICS

1. Go Back to the **Manage Templates** page. You can always go back to this page by clicking **Back to Templates** button.
2. Expand the Uncategorized group.
3. Click on the Diagnostics link for the Expense Report form template.

Template Name	Current Version	Open Form Link	Open Form Link (anonymous)	Diagnostics
Uncategorized (1)				
Expense Report	1.0.1.1193	Open	Open	Diagnostics

Showing 1 to 1 of 1 entries

4. This should take you to a page with several tabs detailing information about the form. Of particular interest is the **Migration Analysis** page, which will display warnings and suggestions if it detects that there are potential issues with using your form in FormsViewer.



Back to Site FormsViewer

FormsViewer

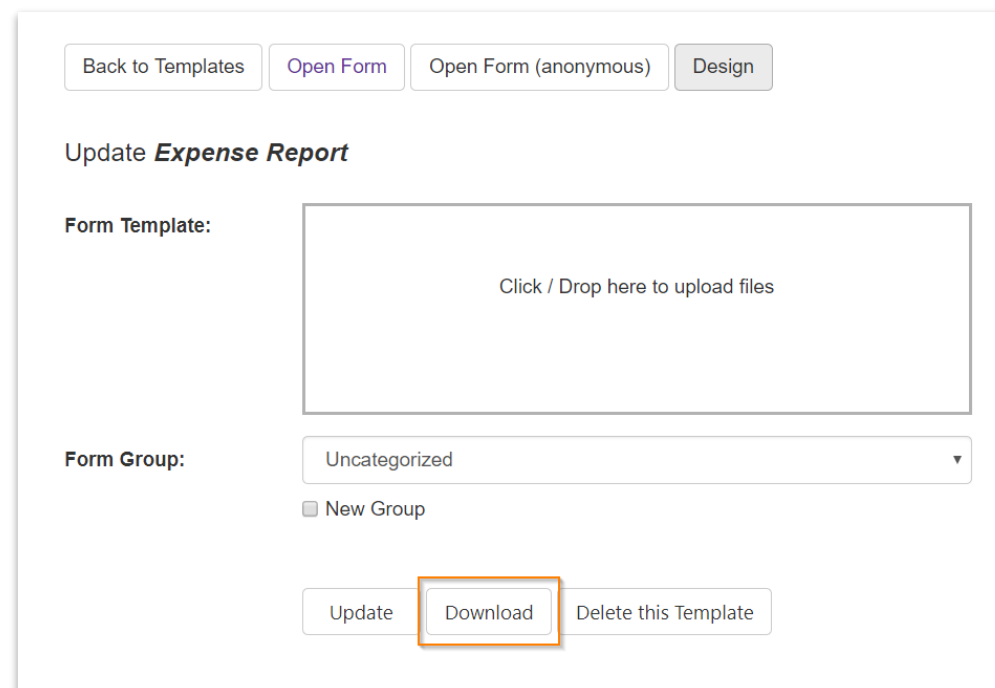
Template Name: Expense Report.xsn

Form Properties Data Connections Views Form Code qRules In Form Promoted Properties Best Practices **Migration Analysis**

No potential issues found.

DOWNLOAD THE FORM TEMPLATE

1. In the Upload Template page, you'll see a Download button at the bottom:



Back to Templates Open Form Open Form (anonymous) Design

Update **Expense Report**

Form Template: Click / Drop here to upload files

Form Group: Uncategorized ▼

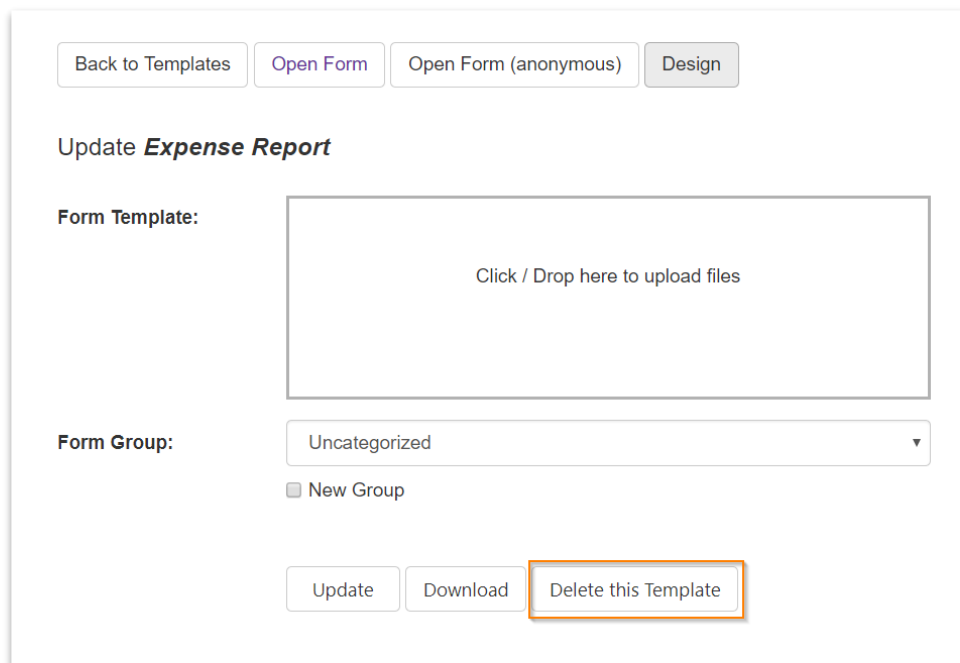
☐ New Group

Update **Download** Delete this Template

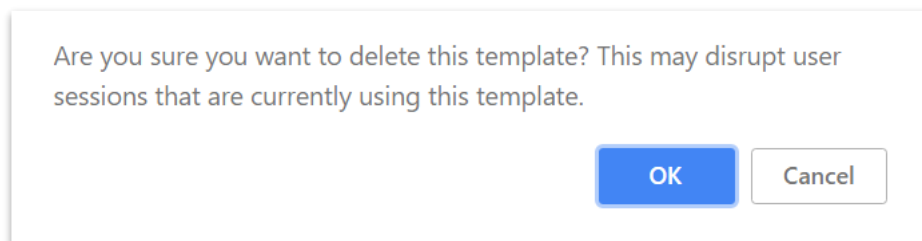
2. Click **Download** to get the form template.

DELETE THE FORM TEMPLATE

1. In the Upload Template page, simply click **Delete this Template** button to delete the form template in FormsViewer:



2. This will bring up a confirmation message:



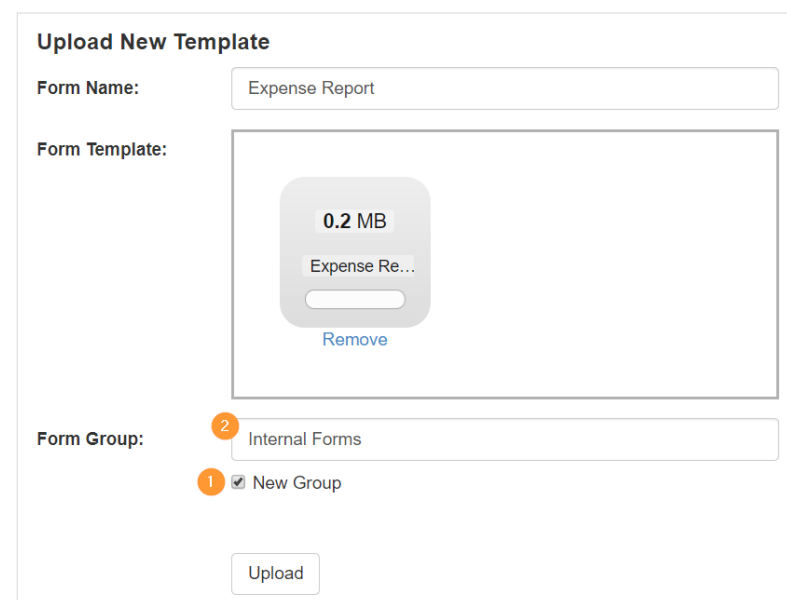
3. Click **OK**.

ORGANIZE FORM TEMPLATES IN GROUPS

Previously, we uploaded the form template without specifying its group. This automatically places the form template under "Uncategorized". But, as the number of your form templates grow, it's better to organize them by groups.

In the Upload Template page, you can directly place the form template in a group by creating new or selecting an existing group. Here are the steps:

1. When uploading a new form template, check **New Group** and enter the name for the group.



2. Click **Upload**.

3. The next time you upload a form template, this group will be available in the Form Group dropdown:

Upload New Template

Form Name:

Form Template:

0.2 MB

PT_Custom...

Remove

Form Group:

Uncategorized
Uncategorized
Internal Forms

Upload

4. Here's an example of form templates categorized in groups:

Manage Templates

Upload a New Template

Template Name	Current Version	Open Form Link	Open Form Link (anon)
HR (1)			
Leave Request	1.0.1.1193	Open	Open
Internal Forms (2)			
Customer Contact	1.0.1.462	Open	Open
Expense Report	1.0.1.1193	Open	Open
Sales & Marketing (1)			
Sales Report	1.0.1.1193	Open	Open

Showing 1 to 4 of 4 entries

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