

CONFIGURING THE FORMSVIEWER EXTENSIONS ADD-ON

CONTENTS

Configuring the FormsViewer Extensions Add-on	1
CONTENTS	1
PREREQUISITES	1
LIMITATIONS	1
INITIAL SETUP – UPLOAD THE APP PACKAGE TO THE APP CATALOG.....	1
INITIAL SETUP – INSTALL FORMSVIEWER EXTENSIONS IN YOUR SITE	4
INITIAL SETUP – ADD A PAGE FOR THE FORMSVIEWER EXTENSIONS CONFIGURATION UTILITY	5
CONFIGURE A LIBRARY TO USE THE FORMSVIEWER EXTENSIONS	7
(FORM LIBRARIES ONLY) DISABLE OPEN IN BROWSER BEHAVIOR.....	9
ADVANCED FEATURES	9
DEPLOYING SETTINGS TO MULTIPLE SITES	9

USING MULTIPLE TEMPLATES	11
SUPPORT.....	12
Contact Information	12

PREREQUISITES

- You should already have FormsViewer installed on the site that contains your form library or list, or on an ancestor (parent, etc.) of that site.
- You should already have your form template uploaded to the Manage Templates page in FormsViewer.

LIMITATIONS

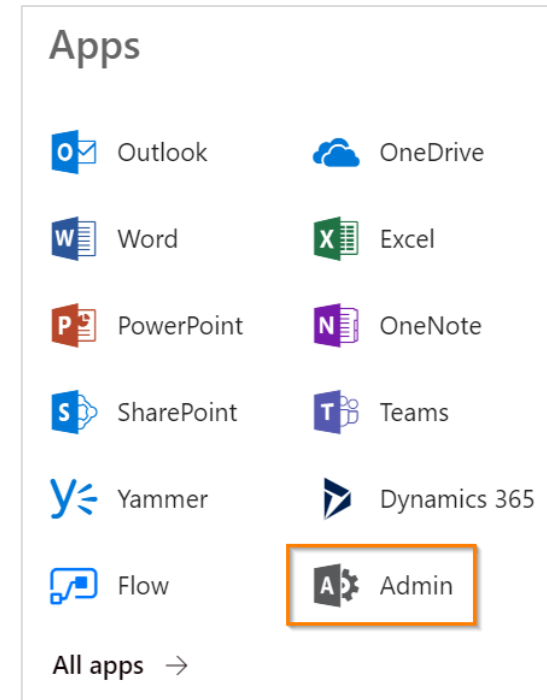
- These utilities do not currently work with On-Premise SharePoint
- These utilities only work when using SharePoint's Modern UI
 - For a similar approach that works in Classic UI, see our [FVLinks Package](#).

INITIAL SETUP – UPLOAD THE APP PACKAGE TO THE APP CATALOG

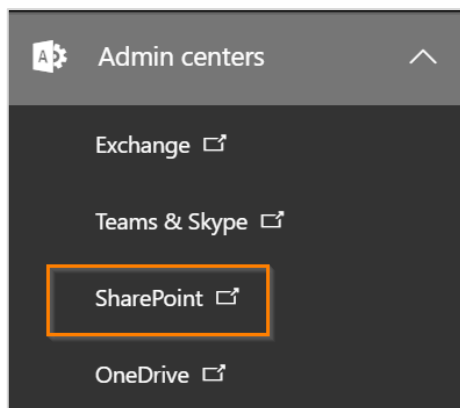
These steps need to be carried out once per SharePoint tenant, and should also be followed to install updates to the FormsViewer Extensions

Requires: **Global Admin permissions**

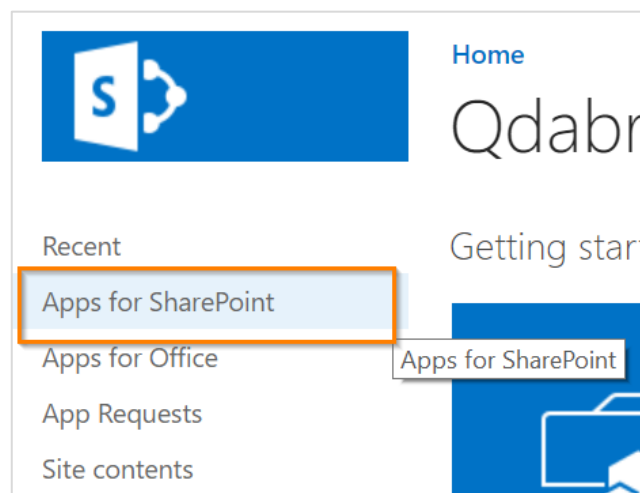
1. Navigate to your SharePoint Online environment.
2. In the top left of the page, click the menu icon and then Admin.



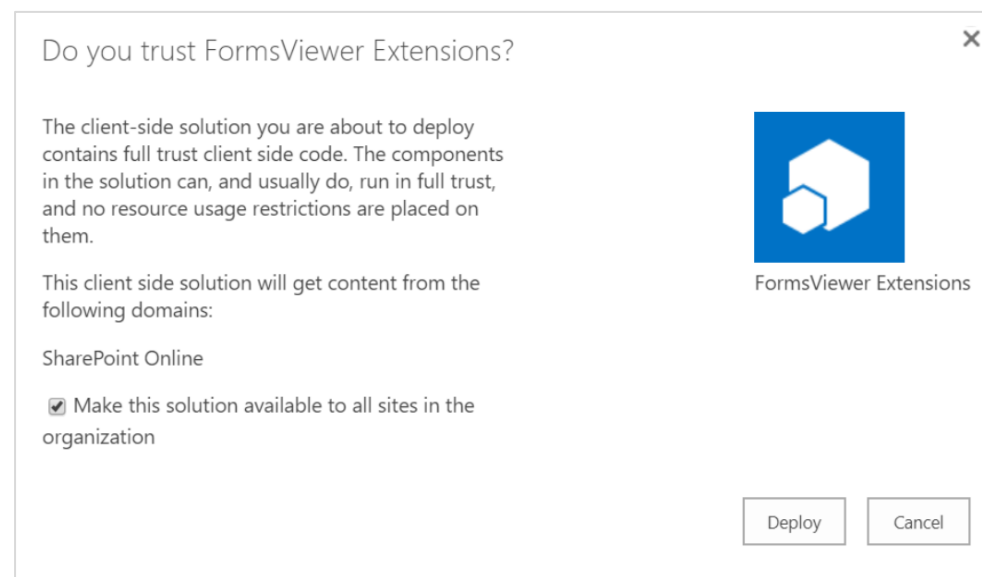
3. On the Admin center page, click **Admin Centers** in the sidebar, and then SharePoint.



4. In the SharePoint admin center, click **apps** in the sidebar.
5. Click **App Catalog**.
6. On the **App Catalog** page, click **Apps for SharePoint** in the sidebar.



7. Once on the **Apps for SharePoint** page, drag the **FormsViewer Extensions.sppkg** file into the page or use the Upload button to upload it.
8. You will be presented with a "Do you trust FormsViewer Extensions?" popup.
 - a. About the **Make this solution available to all sites in the organization** option: Check this box if you want the app to be automatically installed in all sites and subsites in your tenant. This can help you save time from manually installing it in each site and is recommended if you are using FormsViewer in a large number of sites.



9. Once you have either checked the box or decided not to check it, click the **Deploy** button.

10. If you have previously uploaded the package to your app catalog, you will be prompted to replace the file. In this case, click **Replace It** to replace it.

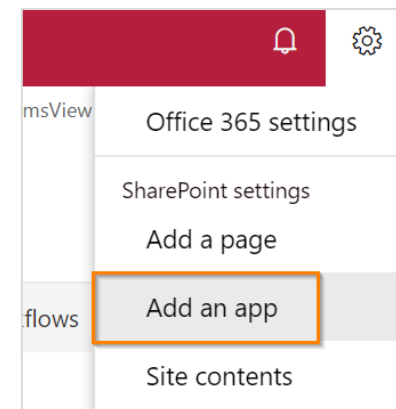
INITIAL SETUP – INSTALL FORMSVIEWER EXTENSIONS IN YOUR SITE

Please skip this section if you selected the “Make this solution available to all sites in the organization” option in the previous section.

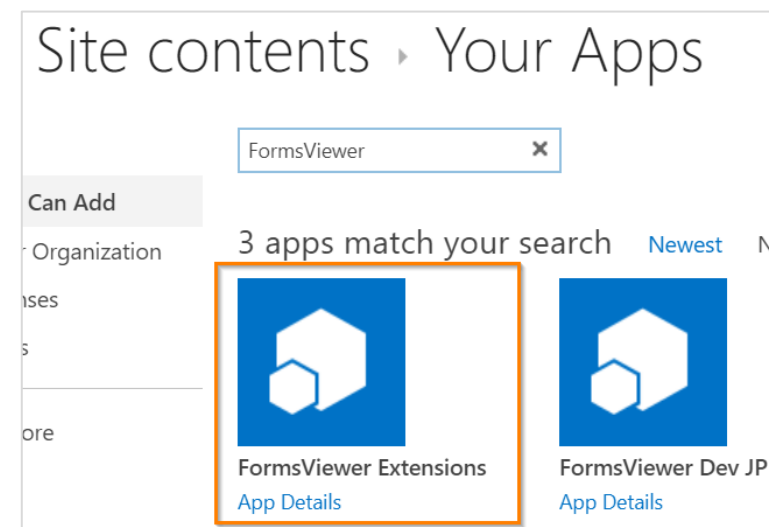
These steps need to be carried out once per site where you plan to use the FormsViewer Extensions. They do not need to be repeated when there is an update to the package.

Requires: **Site Admin permissions**

1. Navigate to the site where you want to use FormsViewer Extensions.
2. Click the gear icon in the top-right of the page, and click **Add an App**.



3. On the **Your Apps** page, use the search box to search for FormsViewer Extensions.



4. Click the FormsViewer Extensions icon.

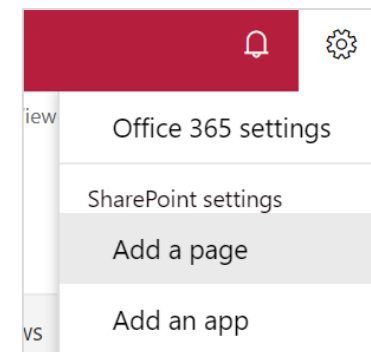
5. The app should finish installing to your site within a few minutes.

INITIAL SETUP – ADD A PAGE FOR THE FORMSVIEWER EXTENSIONS CONFIGURATION UTILITY

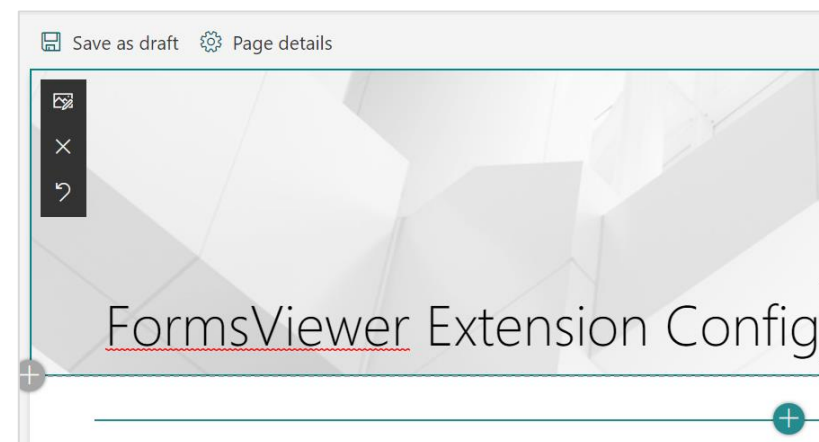
These steps need to be carried out once per site where you plan to use the FormsViewer Extensions, unless you plan to multi-cast FormsViewer settings to multiple sites at once (see the Advanced section of this document), in which case you would carry these steps out in an ancestor (parent, etc.) of those sites.

Requires: **Site Admin permissions**

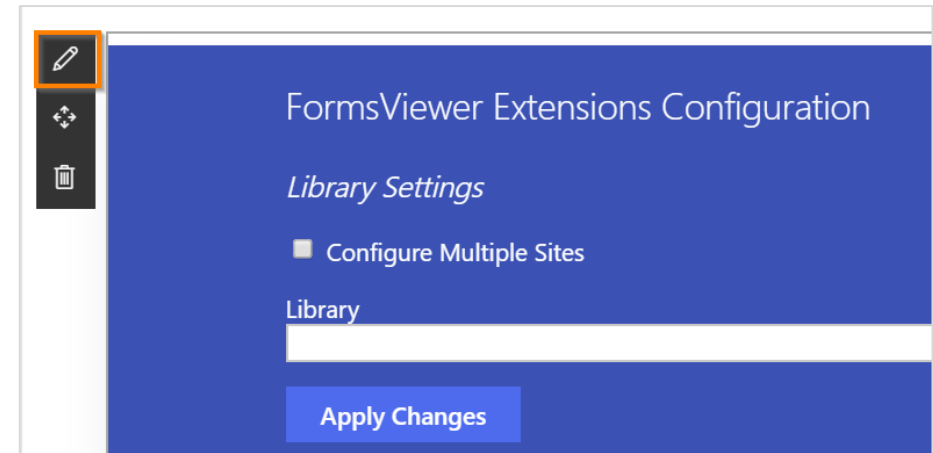
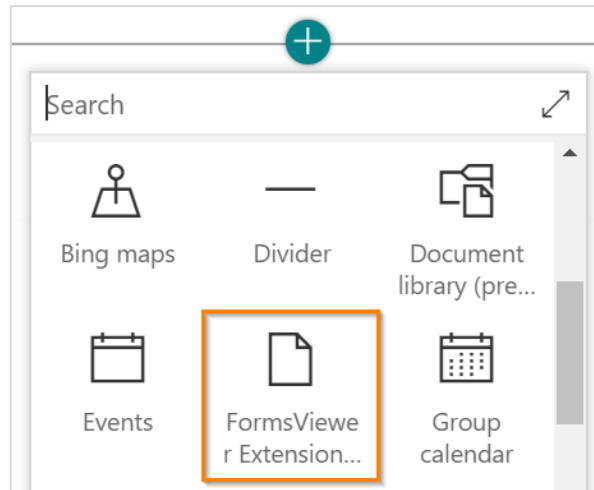
1. Navigate to one of your SharePoint sites which is (a.) the site where you plan to use FormsViewer Extensions if you are using them in a single site or (b.) the ancestor of the sites where you plan to use it if you are using it in a large set of similar sites. The FormsViewer Extensions app should already be installed in the site as per the previous section of this document, or installed as a result of selecting “Make this solution available to all sites in the organization” when uploading FormsViewer Extensions to the app catalog.
2. Navigate to the Site Contents page of that site and ensure that you are viewing it in the Modern UI.
3. Click the gear icon in the top-right of the page and click **Add a page**.



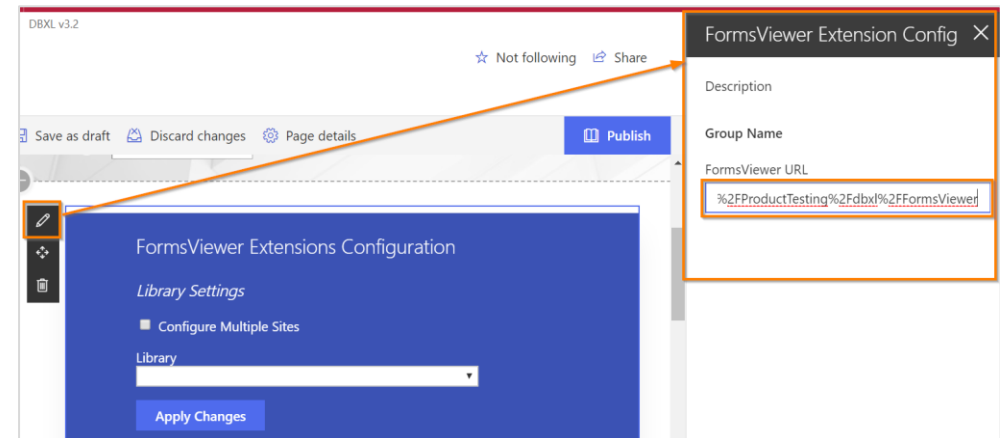
4. In the Name your page area, enter the page title **FormsViewer Extension Config**.



5. Click the + icon in the center of the page to add a new web part.
6. Use the search box or scrollbar to find the **FormsViewer Extension Config** webpart, and click it to add it to the page.



7. Optional: Configure the webpart's FormsViewer URL
 - a. You can store a FormsViewer URL in the webpart's properties so that this value will be automatically available when configuring individual libraries.
 - b. Click the pencil icon next to the webpart that you just added to the page. A pane should open up on the right of the page with a FormsViewer URL field.



- c. To determine the correct FormsViewer URL, open a new browser tab, navigate to the same SharePoint site that you have been working in, open your FormsViewer app from

Site Contents, and copy the URL of the FormsViewer page that opens up. Paste this into the FormsViewer URL field.

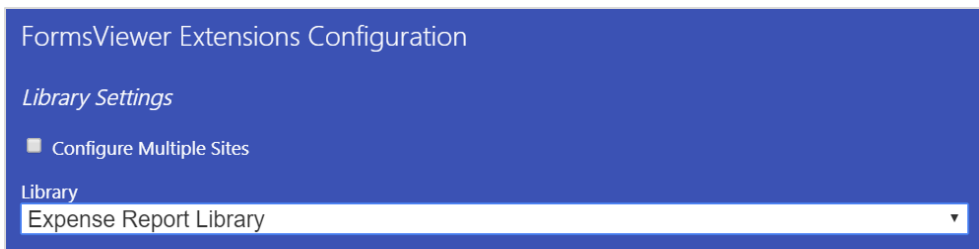
8. Click the **Publish** button in the top-right of the page to save the page to SharePoint.
9. When you need to access this page in the future, you can do so by clicking **Pages** in the SharePoint site's sidebar, then clicking the FormsViewer-Extension-Config page.

CONFIGURE A LIBRARY TO USE THE FORMSVIEWER EXTENSIONS

Requires: **Site Admin permissions**

Note: See the **Advanced** section of this document for details about how to apply FormsViewer settings to multiple sites at once.

1. Open the FormsViewer Extension Config page that you created in the previous section of this document.
2. The dropdown at the top of the utility should populate with a list of all of the libraries in the current site. Select the library that you would like to configure. Example:



FormsViewer Extensions Configuration

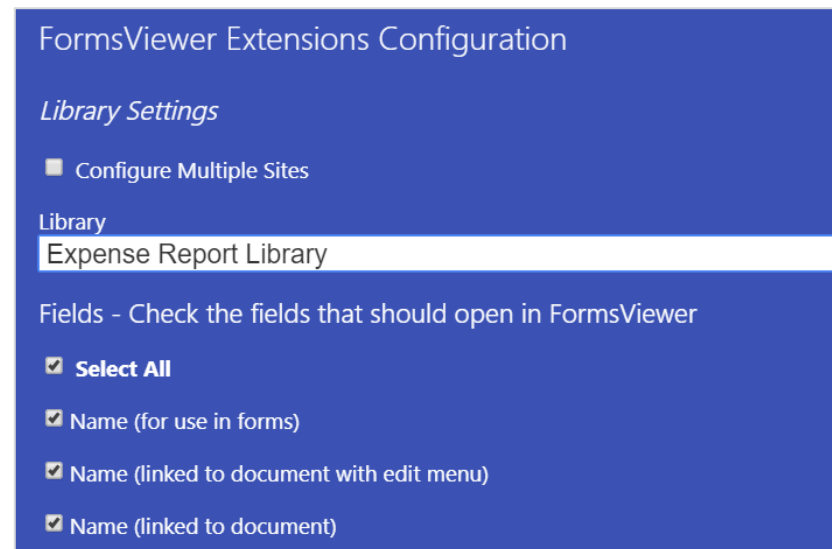
Library Settings

☐ Configure Multiple Sites

Library

Expense Report Library

3. The page should show a list of the Name fields in the selected library (usually three fields). Choose the ones that you would like to override so that they open in FormsViewer.
 - a. Typically, the best approach is to select all three using the **Select All** checkbox.



FormsViewer Extensions Configuration

Library Settings

☐ Configure Multiple Sites

Library

Expense Report Library

Fields - Check the fields that should open in FormsViewer

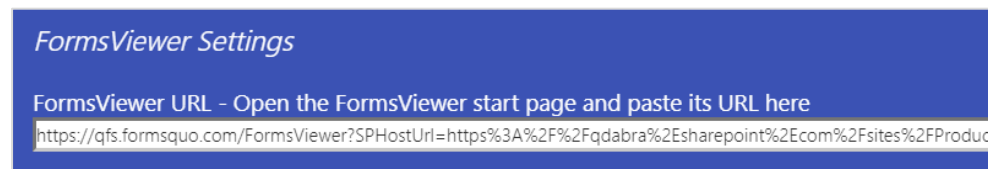
☒ **Select All**

☒ Name (for use in forms)

☒ Name (linked to document with edit menu)

☒ Name (linked to document)

4. If the FormsViewer URL is not automatically populated, provide a value for the FormsViewer URL.



FormsViewer Settings

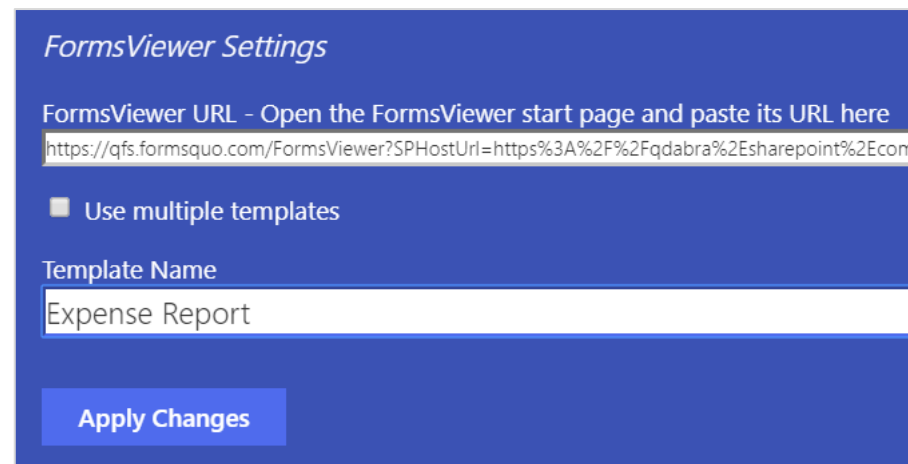
FormsViewer URL - Open the FormsViewer start page and paste its URL here

<https://qfs.formsquo.com/FormsViewer?SPHostUrl=https%3A%2F%2Fqdabra%2Esharepoint%2Ecom%2Fsites%2FProduct>

You can obtain this URL using the following steps:

- Open a new tab and navigate to the same SharePoint site that you are in
- Go to **Site Contents**
- Click on your FormsViewer app
- Once the FormsViewer start page opens, copy and paste the URL into the FormsViewer URL field

5. In the **Template Name** box, enter the name of the template that you would like to use for opening your forms.
 - a. This should *exactly* match the name of the template as shown on FormsViewer's Manage Templates page.
 - b. **Note:** See the Advanced section of this document for details about how to associate a single library with multiple templates.



FormsViewer Settings

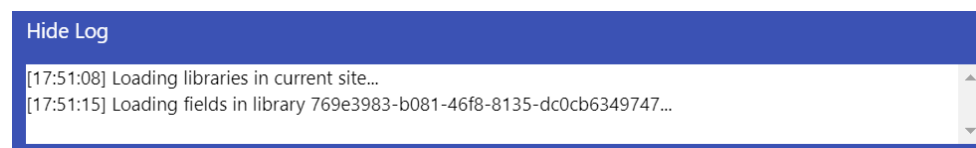
FormsViewer URL - Open the FormsViewer start page and paste its URL here

☐ Use multiple templates

Template Name

Apply Changes

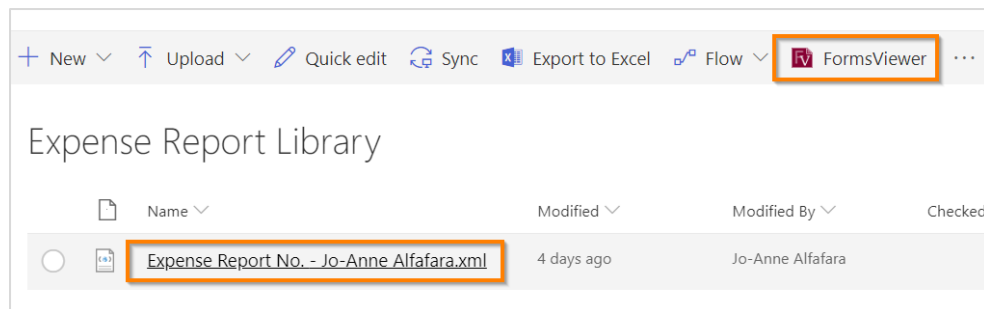
6. Click **Apply Changes**. The configuration utility should save your settings to the library and display a success message.
7. A Log is also shown by default to show a list of steps the utility is performing.



Hide Log

[17:51:08] Loading libraries in current site...
 [17:51:15] Loading fields in library 769e3983-b081-46f8-8135-dc0cb6349747...

Once you have completed the steps up to this point, your library should be configured to open in FormsViewer. If you navigate to that library, you should see a FormsViewer icon in the library's command bar and clicking on any XML file's Name link should open the file in FormsViewer.



(FORM LIBRARIES ONLY) DISABLE OPEN IN BROWSER BEHAVIOR

If you are applying the FormsViewer Extensions to a Form Library, carry out the following steps to disable Open in Browser behavior.

1. Navigate to the library in SharePoint and go to its **Library Settings** page.
 - a. In Modern UI, you can do this by clicking the gear icon and clicking **Library Settings**.
 - b. In Classic UI, you can do this by clicking **Library Settings** in the LIBRARY ribbon.
2. Under the General Settings column, click **Advanced settings**.
3. Under Opening Documents in the Browser, select **Open in the client application**.
4. Click the **OK** button at the bottom of the page.

ADVANCED FEATURES

DEPLOYING SETTINGS TO MULTIPLE SITES

The FormsViewer Extensions app provides a feature that you can use to deploy settings to multiple sites. This means that you can configure multiple libraries to open FormsViewer at once. This is useful when you have several similar sites and a library in each site that you want to associate with the same template in FormsViewer.

Using this feature requires that the following are all true:

- The sites you plan to configure are all within the same site collection
- The sites have a library (Form or Document) with the same name, which you want to FormsViewer-enable
- You want to configure all of these libraries to associate them with the same template(s) in FormsViewer.

Use the following steps to use this feature:

1. In the FormsViewer Extensions Configuration, check the **Configure Multiple Sites** box.
2. Enter a **Starting Site URL** and a **Library Name**.
 - a. The **Starting Site URL** is the URL of the site from which you would like the tool to process. It will crawl that site and all descendants of that site looking for libraries with the indicated name.
 - b. **Library Name** should be the display name of the library that you would like to configure. It is case sensitive.

FormsViewer Extensions Configuration

Library Settings

- ☒ Configure Multiple Sites

Starting Site URL

Library Name

Fields

- ☒ Title (FileLeafRef)
- ☒ Title (LinkFilename)
- ☒ Title (LinkFilenameNoMenu)

3. Leave the Fields check boxes checked.
4. Enter a **Template Name**.
 - a. This should *exactly* match the name of the template as shown on FormsViewer's Manage Templates page.

Load Saved Settings

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

<https://qfs.formsquo.com/FormsViewer?SPHostUrl=https%3A%2F%2Fqdabra%2Esharepoint%2Ecom%2Fsites%2FProducts>

☐ Use multiple templates

Template Name

Expense Report

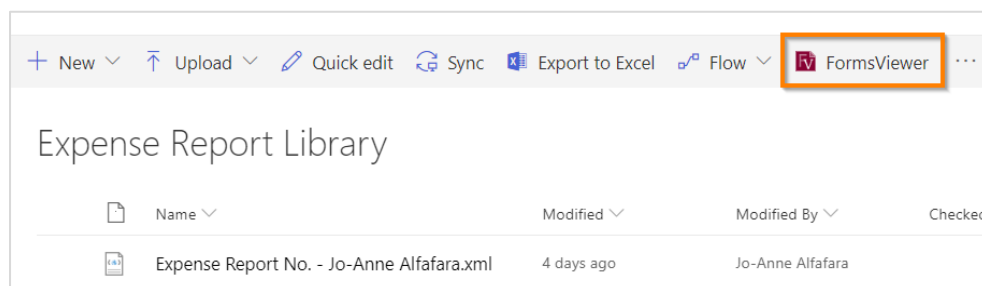
Apply Changes

5. Click **Apply Changes**.
6. You will notice that the log shows the process crawling the Site and all subsites under it, checking for the Library name and applying settings if the Library is found.

Hide Log

```
[16:16:28] Loading libraries in current site...
[16:28:48] Retrieving library Expense Report Library in site
https://qdabra.sharepoint.com/sites/ProductTesting/dbxl...
[16:28:49] Retrieving fields in Expense Report Library...
[16:28:50] Updating field Name (FileLeafRef)...
[16:28:50] Updating field Name (LinkFilename)...
[16:28:51] Updating field Name (LinkFilenameNoMenu)...
[16:28:51] Configuring FormsViewer Open action...
[16:28:52] Retrieving library Expense Report Library in site
https://qdabra.sharepoint.com/sites/ProductTesting/dbxl/dbxlv30...
```

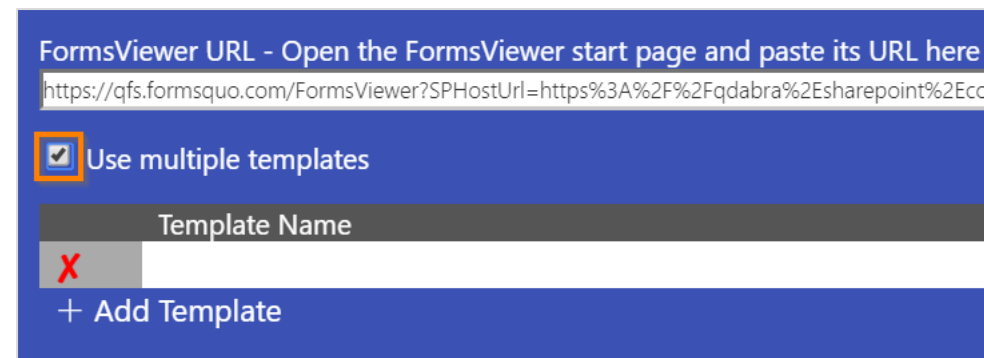
When finished saving, the FormsViewer Extensions app is applied in all of the located libraries and the FormsViewer icon will show in the command bar:



USING MULTIPLE TEMPLATES

In the FormsViewer Extensions Config, there is a checkbox with the label "Use multiple templates". When checked, it will show a table where you can indicate as many FormsViewer templates as you like. This allows you to select multiple form templates in the libraries just like how content types work in SharePoint.

1. Select a Library (when using single-site mode) or check the Configure Multiple Sites box and enter a Starting Site URL and Library Name as the previous section described.
2. Check the box "Use multiple templates".

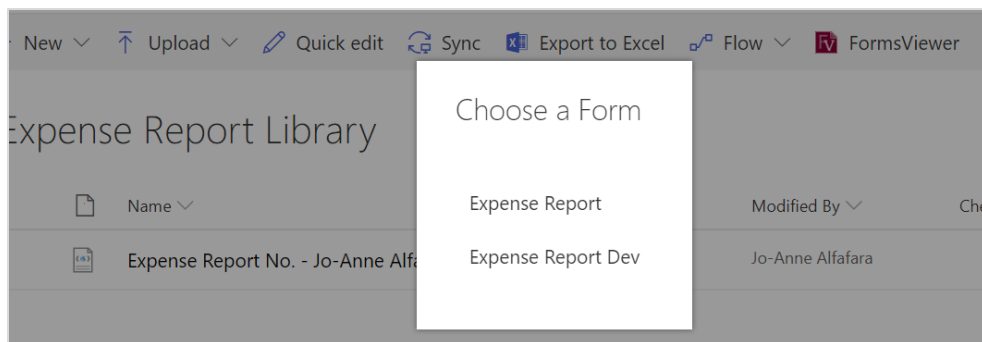


3. Enter a Template Name (This should *exactly* match the name of the template as shown on FormsViewer's Manage Templates page).
4. Click **Add Template** to add more if desired.



5. Click **Apply Changes**.

When applying this setting, the FormsViewer button in the command bar will pop up a dialog with a list of the specified templates. Clicking any of these template names should open the template in FormsViewer.



SUPPORT

If you have encountered issues while using this extension or other Qdabra products, please contact support@qdabra.com.

For any other questions not covered in this document, please contact Qdabra Software.

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