



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. If not, please obtain it from the SharePoint store by following the [installation guide](#).
- 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 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 Report Library.stp (*Library*)
- Expense Reports.stp (*Parent List*)
- Expense List Items.stp (*Child List*)

.xsn file:

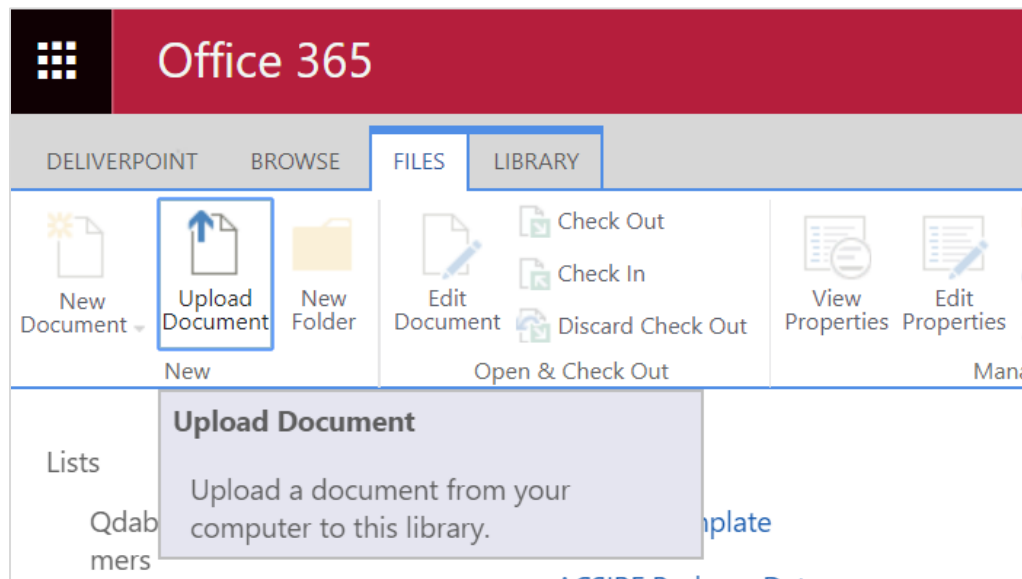
- Expense Report Form.xsn

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**.

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

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



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

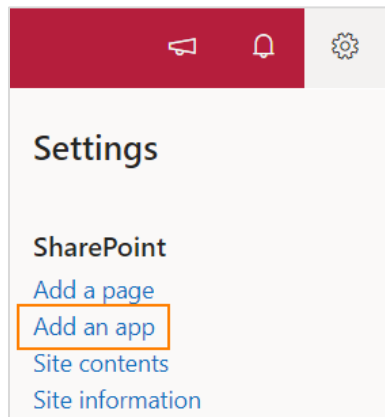
IMPORTANT: Do not change the naming convention upon uploading.

Qdabra's Office 365 Team Site  EDIT LINKS

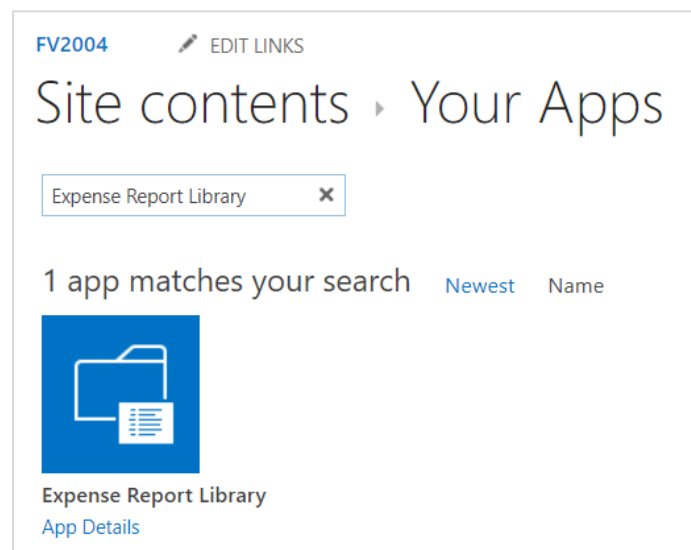
List Template Gallery

☐	Name	Edit	Modified↓	Title
	Expense List Items		1/17/2019 8:45 PM	Expense List Items
	Expense Reports		1/17/2019 8:45 PM	Expense Reports
	Expense Report Library		1/17/2019 8:44 PM	Expense Report Library

5. Once the template files are uploaded, go to your site/subsite where you want to deploy the Expense Report. Click the Gear icon in the header bar and click **Add an app**.



6. Search for the template file name to add. For example, search for Expense Report Library.



7. Create a custom library based off the template. 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 Report Library

[Advanced Options](#)

Create

Cancel

8. The Expense Report Library will be created, and you'll see it added under Site Contents.

Contents		Subsites
	Name	Type
	Documents	Document library
	Site Assets	Document library
	Expense Report Library	XML forms library
	Site Pages	Page library

9. Remember to do these steps for the other STP files – Expense Reports and Expense List Items:

Expense Reports ×

1 app matches your search



Expense Reports
[App Details](#)

Adding Custom List

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

Name:

[Advanced Options](#) Create Cancel

Expense List Items ×

1 app matches your search



Expense List Items
[App Details](#)

Adding Custom List

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

Name:

[Advanced Options](#) Create Cancel

10. When done adding the STPs as an app, you'll see them under Site Contents:

 Name	Type
 Documents	Document library
 Site Assets	Document library
 Expense List Items	List
 Expense Reports	List
 Expense Report Library	XML forms library
 Site Pages	Page library

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

Upload the Form Template in FormsViewer

1. Go to your SharePoint site and click on **Site Contents**.
2. Click on the **FormsViewer** icon

Contents		Subsites
	Name	Type
	Documents	Document library
	Site Assets	Document library
	Expense List Items	List
	Expense Reports	List
	Expense Report Library	XML forms library
	FormsViewer	App
	Site Pages	Page library

3. Click **Manage Templates**.



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. 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.

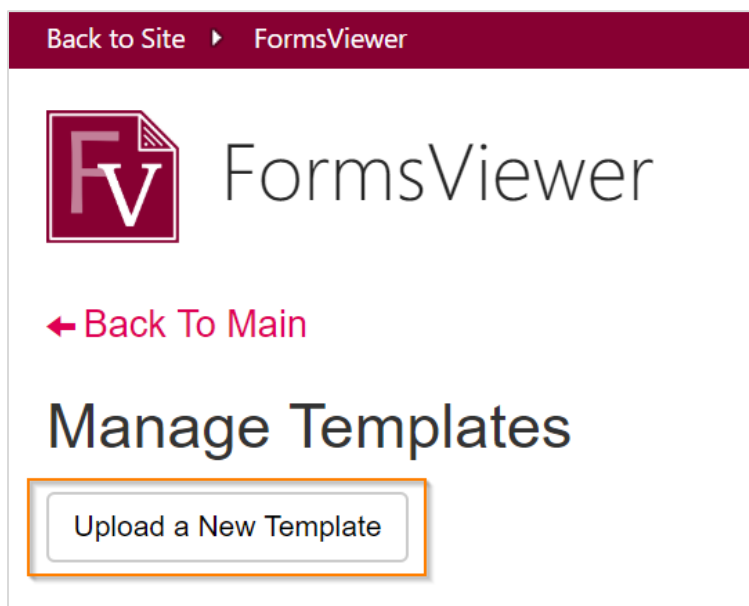
Release Notes

Details and guidance about what has changed between FormsViewer versions.

Known Issues and Workarounds

Have an issue? Check [here](#) for quick workarounds.

4. Click **Upload a New Template**.



5. In the **Form Name** field, enter Expense Report Form.

[Back to Site](#) ▶ [FormsViewer](#)



FormsViewer

[Back to Templates](#)

Upload New Template

Form Name:

Form Template:

Click / Drop here to upload files

Form Group:

☐ New Group

6. Browse or drag the **Expense Report Form** XSN to the Form Template box.

TIP: To help you organize your forms, check **New Group** and enter **FV Training Day 1** as the group name. This will place the form in that new category. You may create separate groups for each day of the training.

7. Click **Upload**. You will get a message that your form is successfully added.



FormsViewer

[Back to Templates](#)
[Open Form](#)
[Open Form \(anonymous\)](#)
[Design](#)

Your template has been successfully updated.

Update ***Expense Report Form***

Form Template:

Click / Drop here to upload files

Form Group:

FV Training Day 1

☐ New Group

Configure the FormsViewer Extensions Add-on

In this section, we will configure your Modern UI library views to open documents and templates in FormsViewer. Obtain the FormsViewer Extensions file in **FormsViewer Training Day 1 → FormsViewer Extensions** folder or download it from this [link](#).

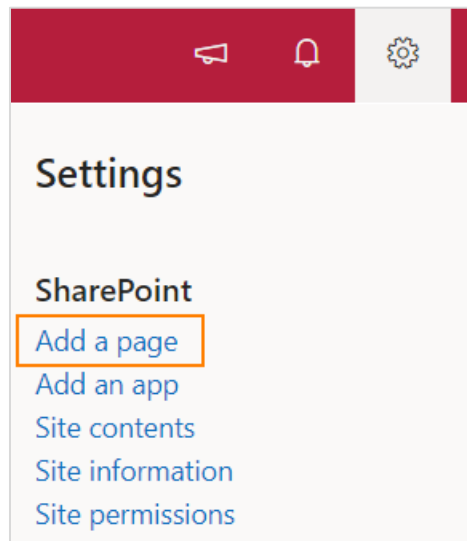
Follow the document "**Configuring the FormsViewer Extensions Add-on.pdf**" to upload the app in your SharePoint app catalog.

TIP: If you checked the "*Make this solution available to all sites in the organization option*", the app is 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.

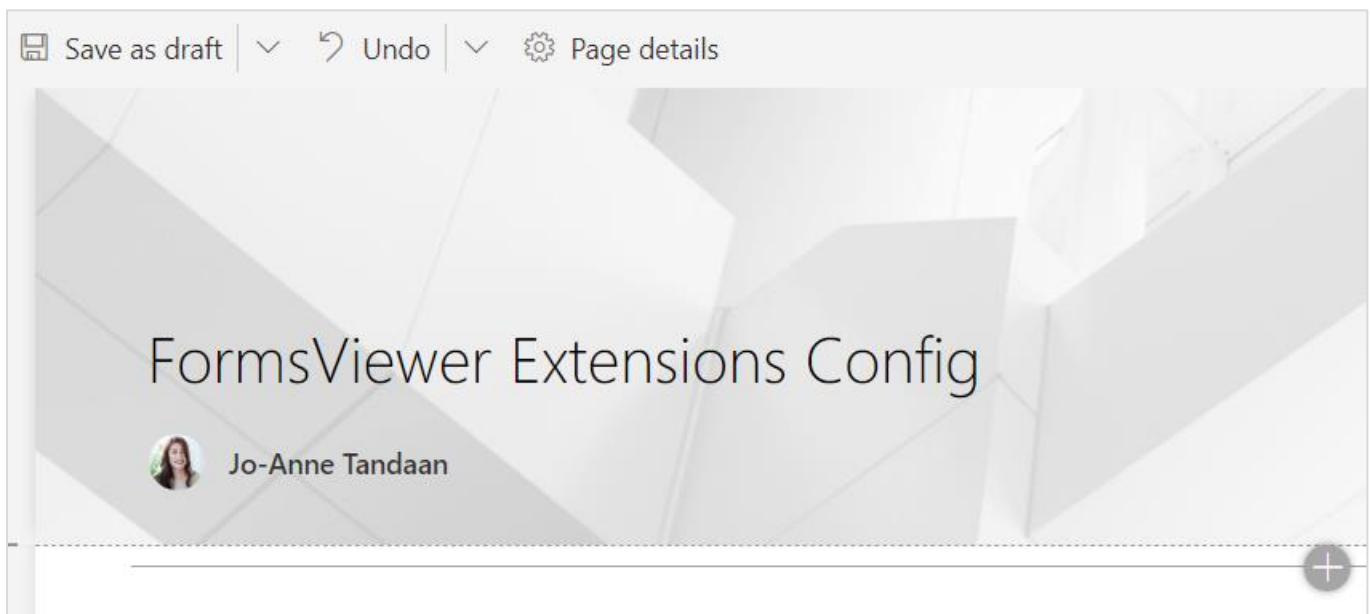
Create a Site Page for the FormsViewer Extensions Utility

These steps assume that you already have the FormsViewer Extensions app installed in the site where you plan to use FormsViewer.

1. Navigate to the SharePoint site.
2. Click the gear icon in the top-right of the page click **Add a Page**.



3. In the Name your page area, enter the page title **FormsViewer Extensions Config**.



4. Click the + icon in the center of the page to add a new web part.

FormsViewer Extensions Config

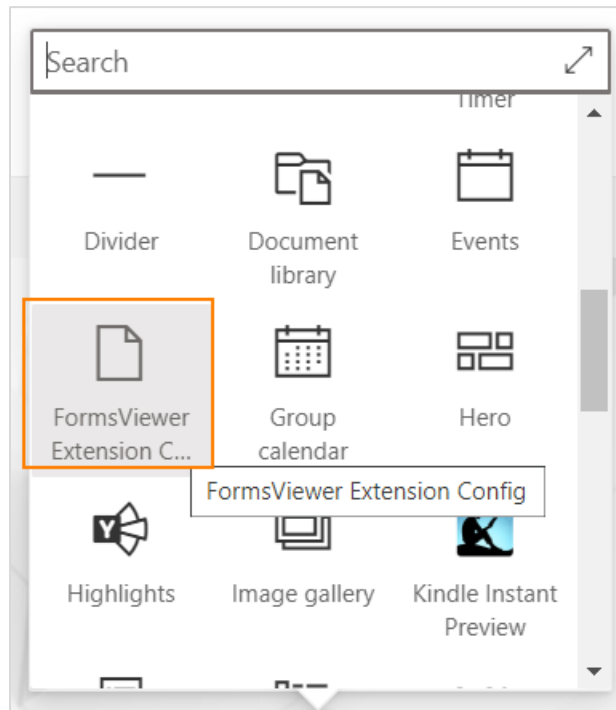


Jo-Anne Tandan

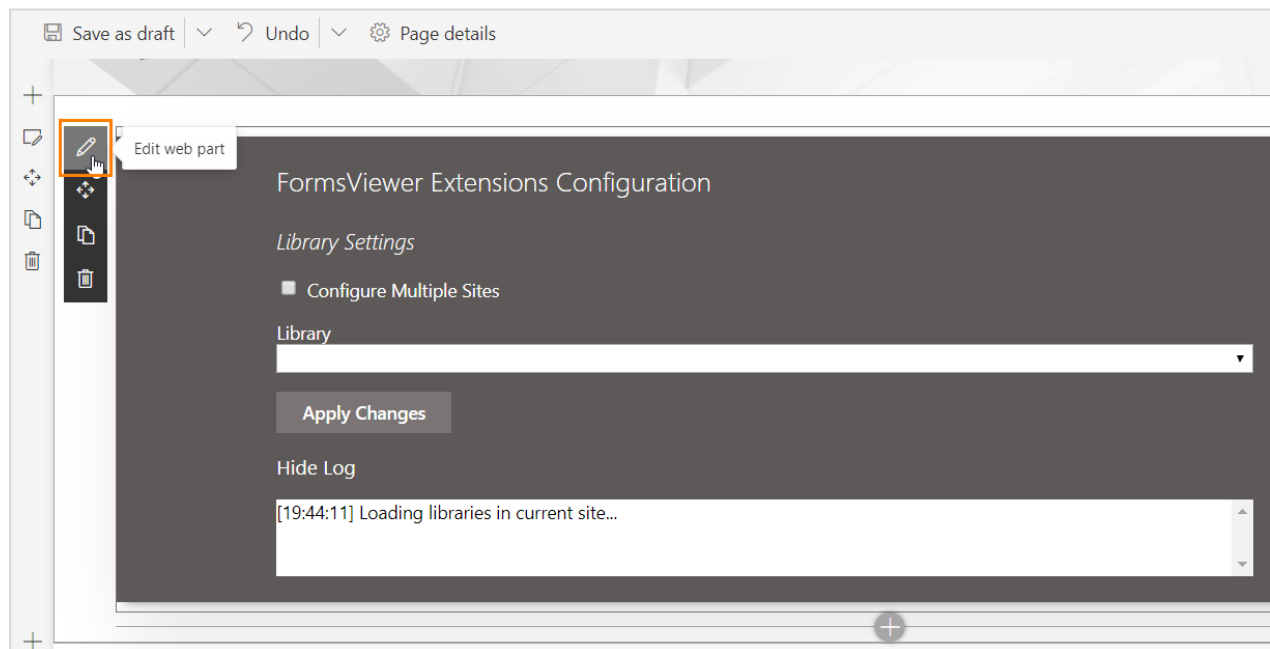


Add a new web part in column one

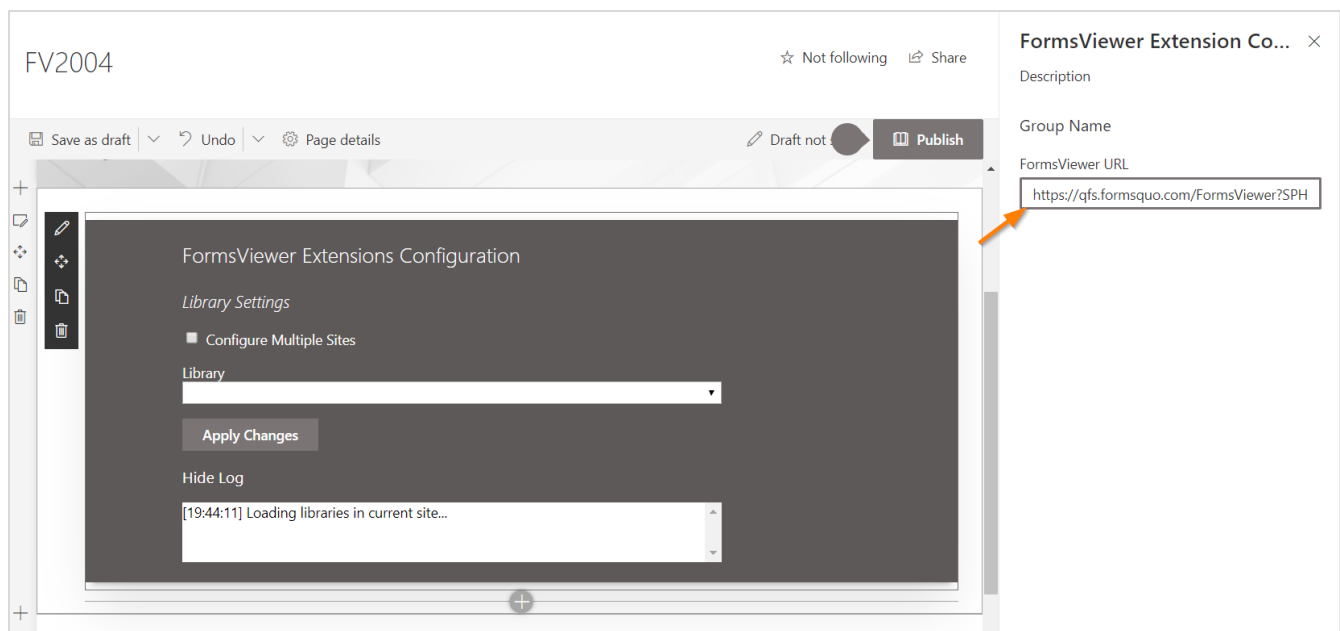
5. Use the search box or scrollbar to find the **FormsViewer Extension Config** web part and click it to add it to the page.



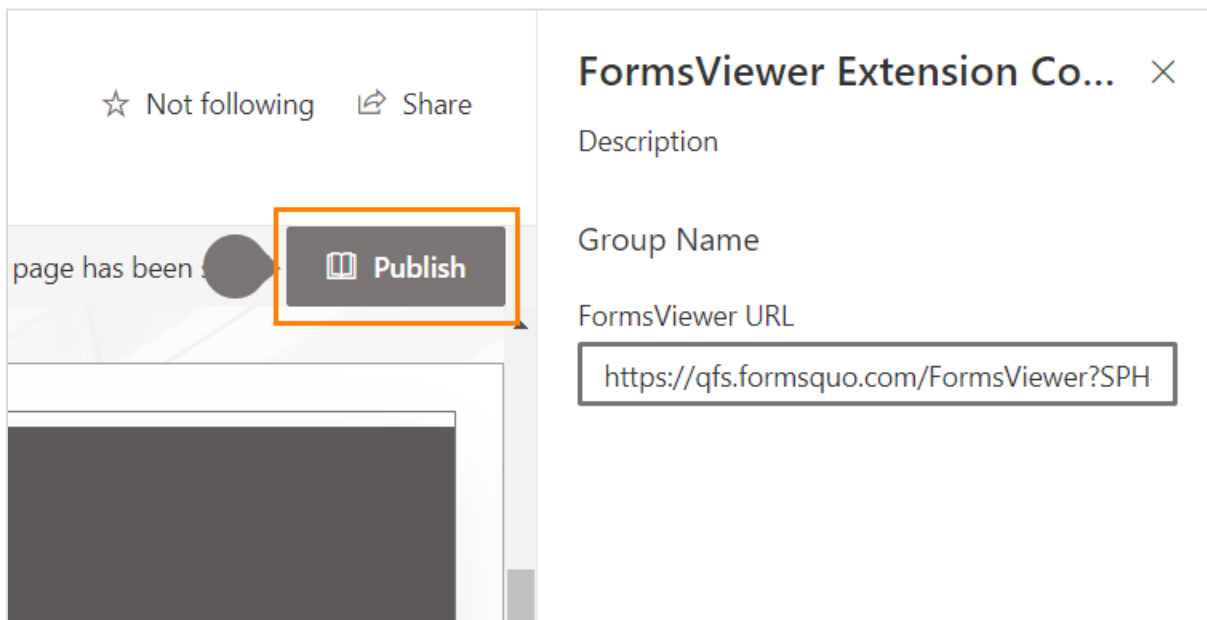
6. Click the pencil icon next to the web part that you just added to the page. A pane should open on the right of the page with a FormsViewer URL field.



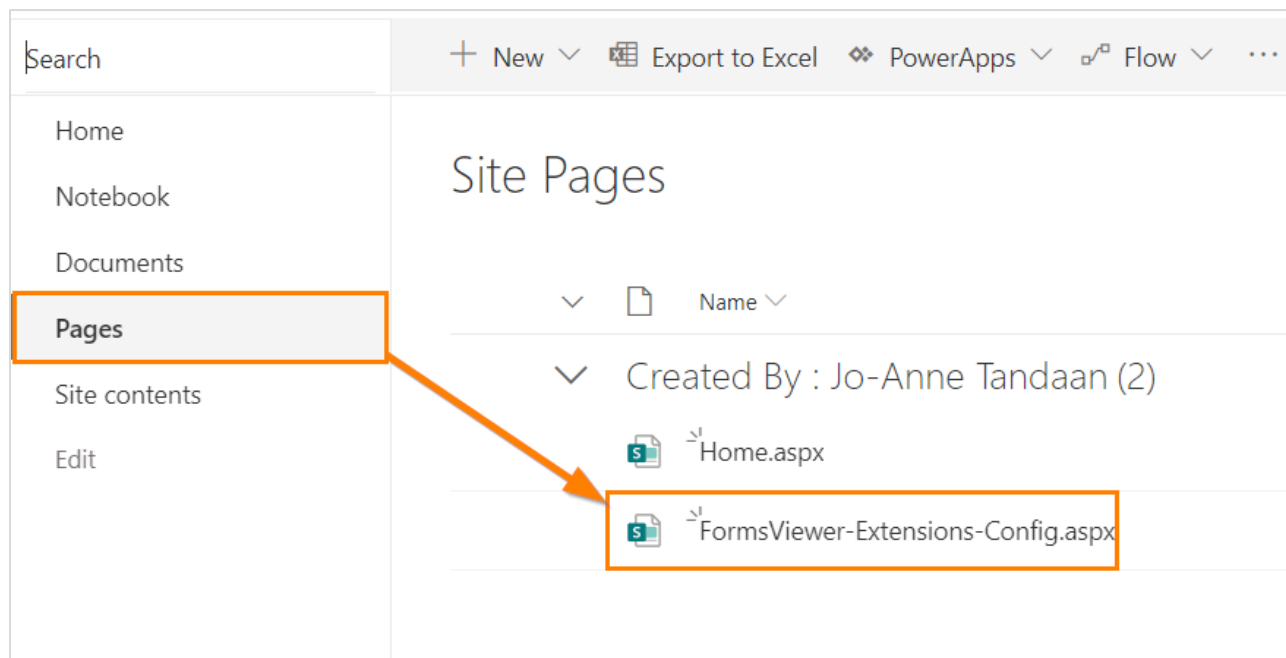
- To determine the correct FormsViewer URL, open a new browser tab, navigate to the same SharePoint site that you have been working in, open your FormsViewer app from Site Contents, and copy the URL of the FormsViewer page that opens. Paste this into the FormsViewer URL field



- Click the **Publish** button in the top-right of the page to save the page to SharePoint.

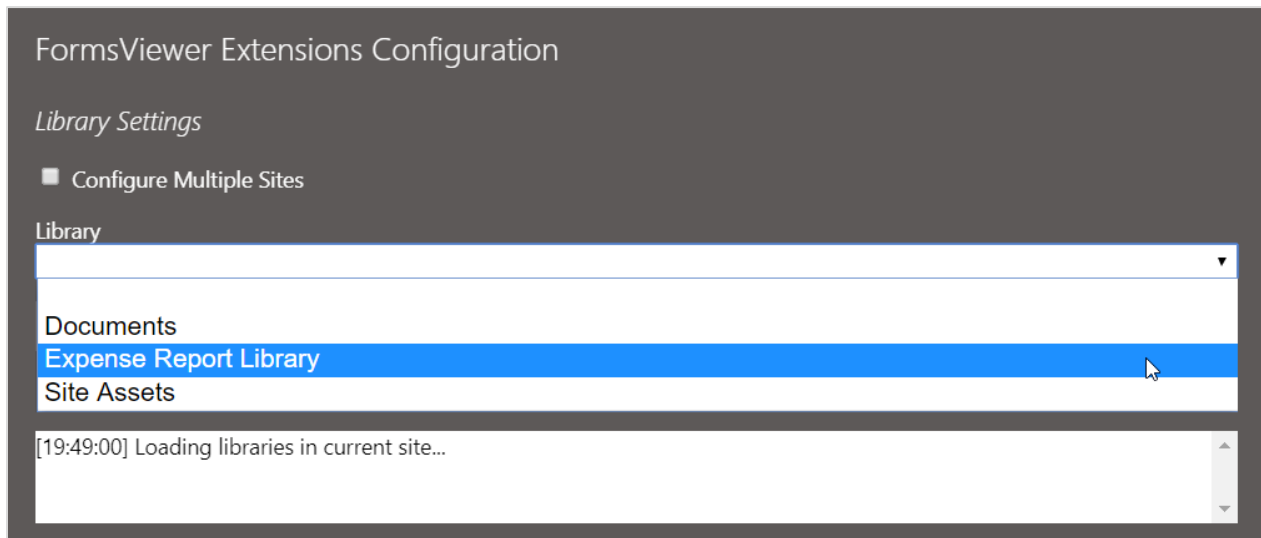


9. When you need to access this page in the future, you can do so by clicking **Pages** in the SharePoint site's sidebar, then clicking the FormsViewer Extensions Config page.



Configure the library to use the FormsViewer Extension

1. Open the FormsViewer Extensions Config page that you created.
2. The Library dropdown should populate with a list of all the libraries in the current site. Select the **Expense Report library**.



FormsViewer Extensions Configuration

Library Settings

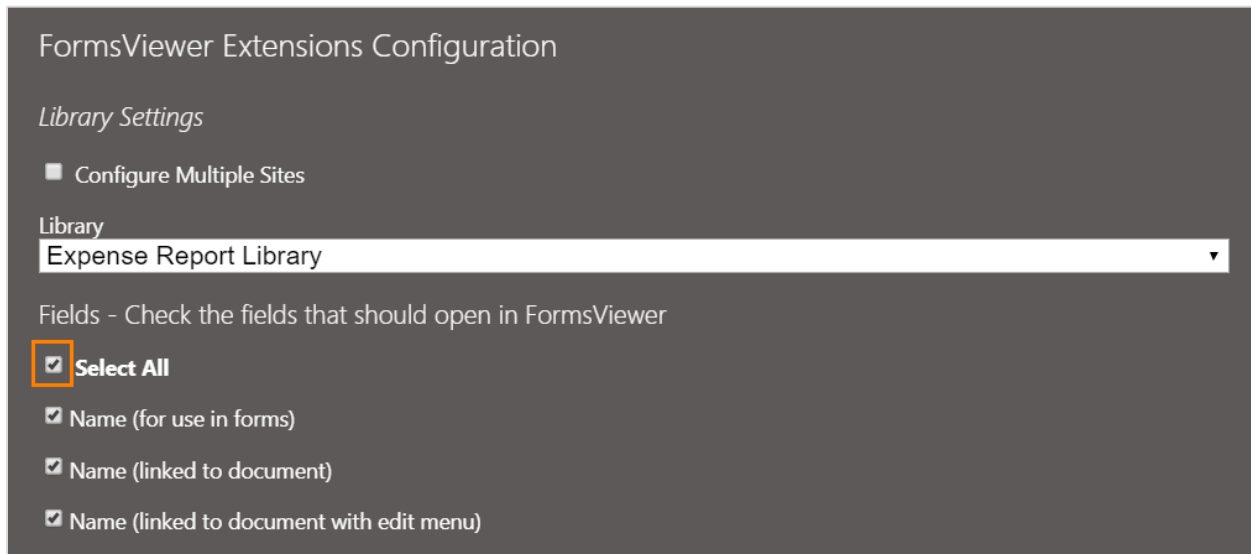
☐ Configure Multiple Sites

Library

- Documents
- Expense Report Library**
- Site Assets

[19:49:00] Loading libraries in current site...

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. 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)

☒ Name (linked to document with edit menu)

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.sharepoint.com%2FTraining%2FFV2004&SPLanguage=en-US&SPClientTag=0&SPProdu>

☐ Use multiple templates

Template Name

Apply Changes

- In the **Template Name** box, enter the name of the template that you would like to use for opening your forms. This should *exactly* match the name of the template as shown on FormsViewer's Manage Templates page. In this case, we'd like to use the **Expense Report Form** template. Remember – this is the name we used when we uploaded the starter form.

FormsViewer Settings

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

<https://qfs.formsquo.com/FormsViewer?SPHostUrl=https%3A%2F%2Fqdabra.sharepoint.com%2FTraining%2FFV2004&SPLanguage=en-US&SPClientTag=0&SPProdu>

☐ Use multiple templates

Template Name

Expense Report Form

Apply Changes

- Click **Apply Changes**. The configuration utility should save your settings to the library and display a success message.

Once you have completed the steps up to this point, your Expense Report library should be configured to open in FormsViewer.

+ New ▾ ↑ Upload ▾ ✎ Quick edit ↺ Sync 📄 Export to Excel 📺 FormsViewer ⚙️ PowerApps ▾ 🗉

Expense Report Library

📄	Name ▾	Expense Date ▾	Name ▾	Manager Name ▾	Status ▾

Test Your Form!

1. Go to the Expense Report library (modern UI) and click the FormsViewer icon in the header menu to open a blank form. The form will look something like this:


Close

EXPENSE REPORT

NAME Jo-Anne Tandan	MANAGER Jo-Anne Tandan	ACCOUNTING MANAGER Jo-Anne Tandan
REPORT DATE 4/1/2020	BUSINESS PURPOSE * 	

EXPENSE ITEMS						FROM:	TO:
CATEGORY *	DATE *	DESCRIPTION	MERCHANT	RECEIPT	AMOUNT *		
Select... ▼				Attach file			
					SUBTOTAL		\$0.00
					LESS CASH ADVANCE		\$0.00
					TOTAL		\$0.00

Insert item

Submit

Solution Version: 1.0.1.1

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Congratulations! You have successfully deployed the Expense Report Form in FormsViewer.

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