

automate | capture | integrate



FORMVERSE OUTLOOK ADD-IN

Installing the FORMVERSE Outlook Add-In

April 2019

FORMVERSE, INC.

USA
275 Rose Avenue, Suite 216
Pleasanton, CA 94566

CANADA
622 5th Ave. SW, Suite 102
Calgary, AB T2P 0M6

USA 1.925.264.0045
CANADA 1.403.456.3035

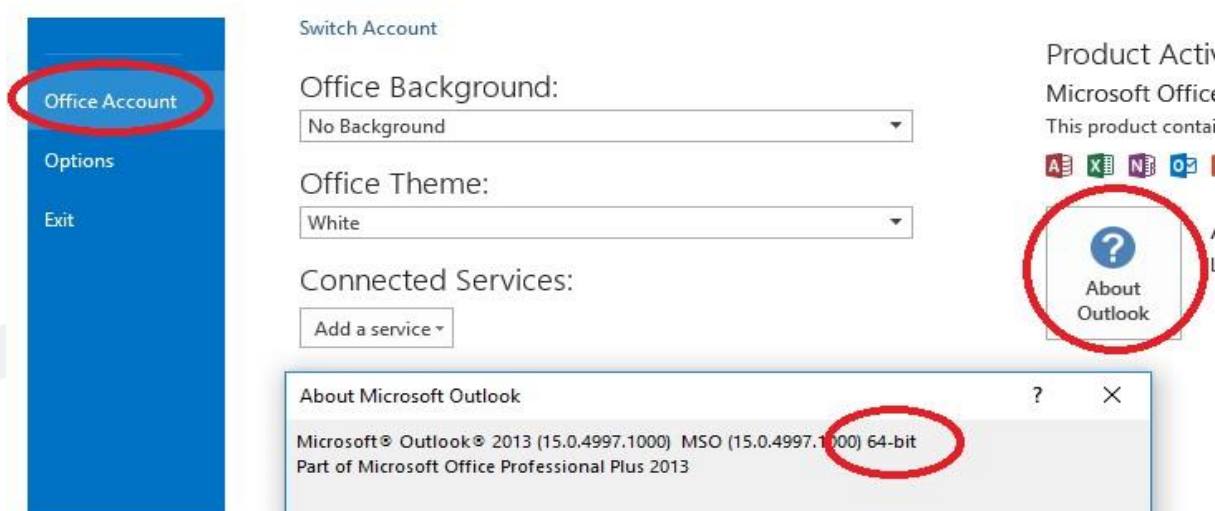
askus@formverse.com
formverse.com

FORMVERSE

Installing the FORMVERSE Outlook Add-In

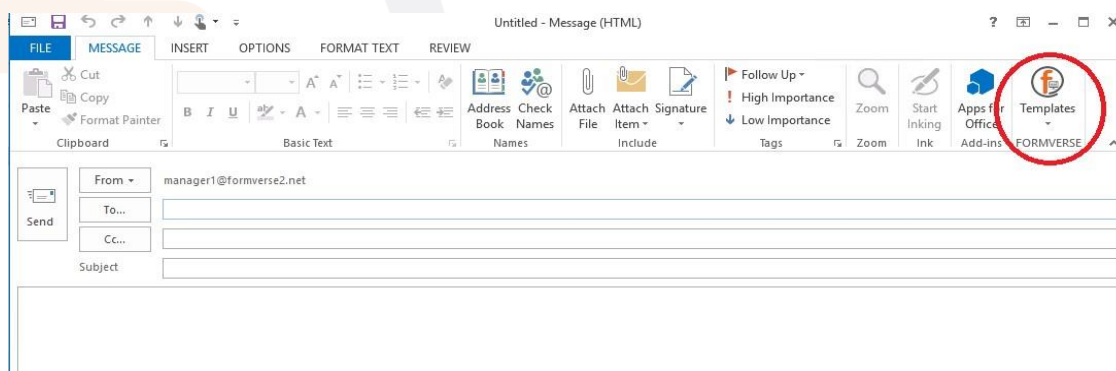
First Time Install

1. Determine your version of Outlook: 32-bit or 64-bit.
 - a. To do this, open Outlook, then click File.
 - b. On the side bar, choose "Office Account".
 - c. On this tab, click the "About Outlook" box. A window pops up that shows if Outlook is 32-bit or 64-bit.
 - d. Click "Ok" on that window to close it.



2. Close Outlook.
3. Ensure .NET Framework 4.5.3 or higher is installed. Refer to the following link to this: [How to determine Installed .NET Framework Version](#).
 - a. Note that administrative credentials are needed to carry out instructions in the link.
4. Go to the following link to obtain installers: [Outlook Add-in Installer](#).
 - a. Double click the "Outlook Add-In" folder to open it. Inside this folder, there is an "x64" folder and a "x86".
 - b. If your Outlook is 32-bit, download the "x86" folder.
 - c. If your outlook is 64-bit, download the "x64" folder.

- d. To download a folder, right click the folder and click “Download”. This downloads it as a zip folder.
5. Once the installer folder is downloaded, unzip the folder.
6. Right click on “setup.exe” and select “Properties”.
 - a. At the bottom area of the “General” tab, on the “Security” section, click “Unblock”, then “OK”.
 - b. If the Unblock button is not the General tab, the file is already unblocked.
7. Once the file is unblocked, right click “setup.exe” again and select “Run as administrator”.
8. Follow the **Install Wizard** Instructions:
 - a. Select “Next”.
 - b. Select “Install **FORMVERSE** Outlook Add-In” for “Everyone”.
 - c. Select “Next” twice.
 - d. Enter the **FORMVERSE** Registry Server Address. The **FORMVERSE** Registry Server has the following format:
<https://servername.domain/formverseserver/>
 - e. Select Next.
9. Check if the **FORMVERSE** Outlook Add-in is installed.
 - a. Launch Outlook and create a New Email. In the new email window, there should be a **FORMVERSE** add-in icon found on the right-hand side of the Message ribbon.



If the **FORMVERSE** Add-In icon is missing, see the following link to troubleshoot:

- [Enable Inactive Outlook Add-In](#)

CANADA Office | 622 5th Avenue SW, Suite 102 | Calgary, AB T2P 0M6
USA Office | 275 Rose Avenue, Suite 216 | Pleasanton, CA 94566
 CANADA: (403) 456-3035 | USA: (925) 264-0045 | formverse.com | askus@formverse.com

Installing a FORMVERSE Outlook Add-in Upgrade:

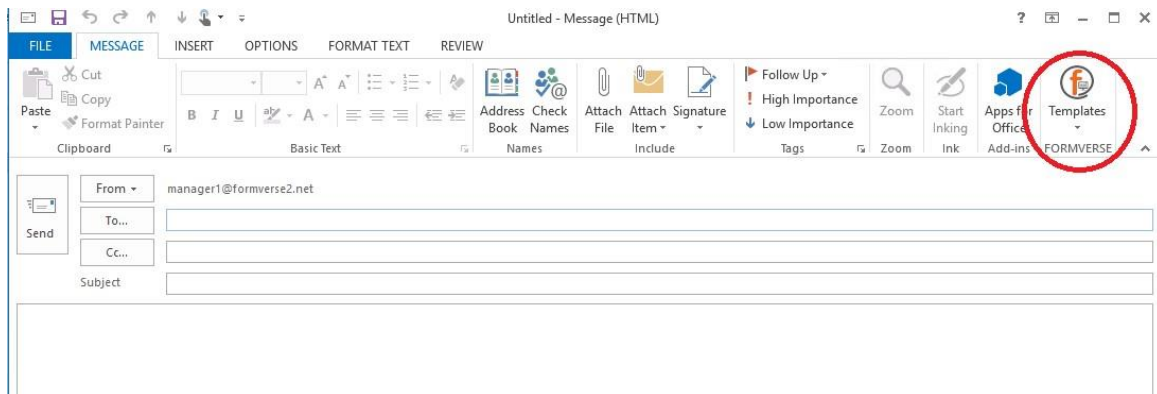
1. Uninstall any existing **FORMVERSE** Outlook Add-In Software.
 - a. Go to “Control Panel” and select “Program and Features”.
 - b. Find “**FORMVERSE** Outlook Add-In” and then uninstall it.
2. Follow all instructions in [section 1.1](#) of this manual. The only difference will be the version of the installers in step 4.



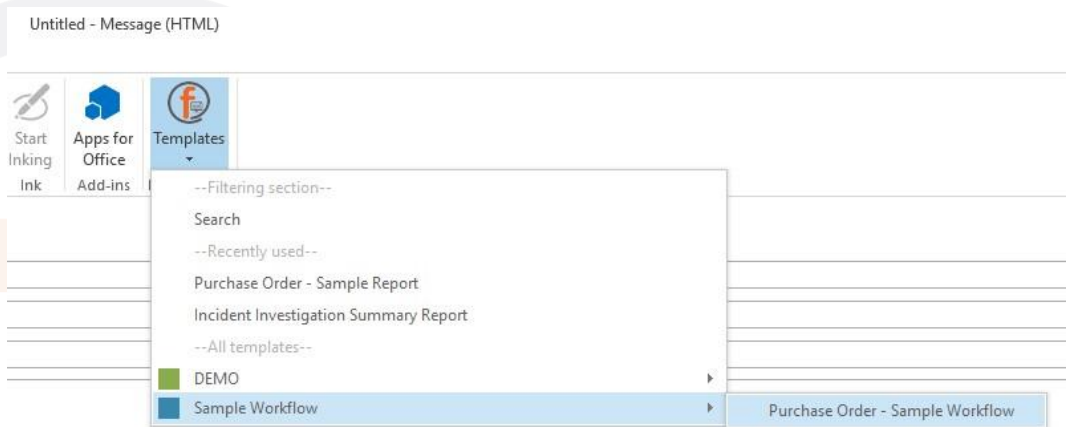
Using the FORMVERSE Outlook Add-In

Initiating a FORMVERSE Application:

1. Create a new email in Outlook. In the new e-mail window, click on the **FORMVERSE** Add-In icon found on the right-hand side of the Message ribbon.



2. A dropdown of available **Application Templates** appears when the icon is clicked. From the dropdown, click on the **FORMVERSE Application** to be initiated.



3. The user can now fill out the template.
4. Once the template is filled, submit by clicking the **Send** button. **DO NOT** change the emails on the “To”, “Cc”, and “Bcc” fields. The destination of the application is already incorporated in the workflow of the template.

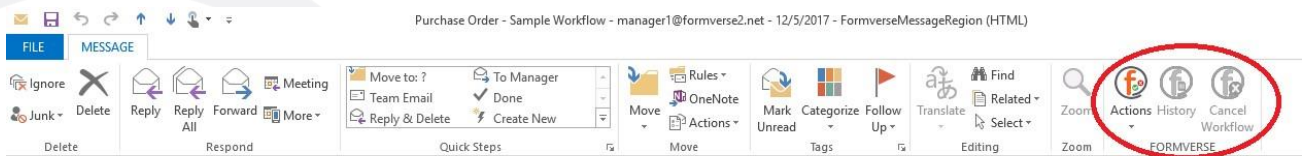
Notes:

- **Required Fields:** Required fields are marked with a red asterisks and/or red dashed boxes. A warning window pops up when the user submits the template with these required fields unfilled.
- **Field Data Type Validation:** Some fields only accept a certain data type. For example, a date field can only be filled with a date that is formatted as dd/mm/yyyy. A red-dashed box appears around the field if any other data format is entered other than the specified format.
- **Attachments:** If files need to be attached to the form, attach the files like any other e-mail attachment in Outlook.

Taking an Action on a FORMVERSE App:

Some applications require an **Action** by the recipient, such as, approving requests. This can be done right on Outlook with the **FORMVERSE** Add-in.

1. To take an **Action** on an application in Outlook, open the e-mail that contains the application that requires an **Action**. On the right-hand side of the Message Ribbon, there are three **FORMVERSE** icons. Click the **Actions** button.



2. A dropdown of available actions appears when the **Actions** button is clicked. Choose and click an **Action** to do.



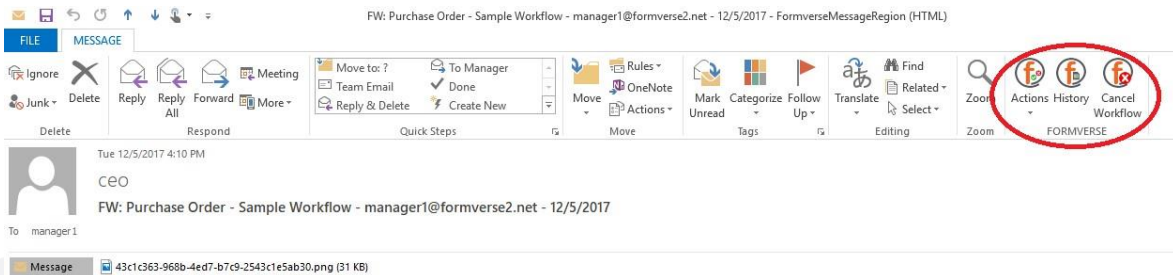
CANADA Office | 622 5th Avenue SW, Suite 102 | Calgary, AB T2P 0M6
USA Office | 275 Rose Avenue, Suite 216 | Pleasanton, CA 94566
 CANADA: (403) 456-3035 | USA: (925) 264-0045 | formverse.com | askus@formverse.com

3. The corresponding template for the **Action** chosen loads. As before, fill out the template and attach appropriate files. When finished, submit the application by clicking the send button.

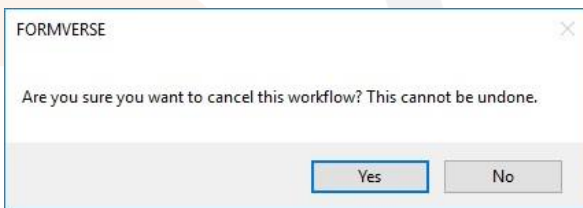
Canceling an Application’s workflow:

A workflow can also be cancelled by the **initiator** of the workflow. Only the initiator can cancel a workflow and it can only be canceled before the workflow is finished.

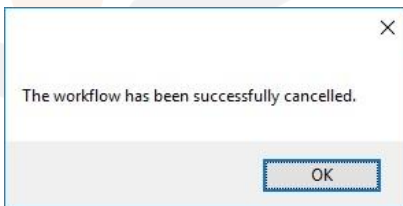
1. To cancel a workflow, open the e-mail that contains the template to be cancelled. This can either be found on the initiator’s “Sent” folder in Outlook or in their Outlook inbox if they are the recipient in the current state of the workflow.
2. On the right-hand side of the Message Ribbon, there are three **FORMVERSE** icons. Click the **Cancel Workflow** button.



3. A warning window pops up to verify the cancellation.



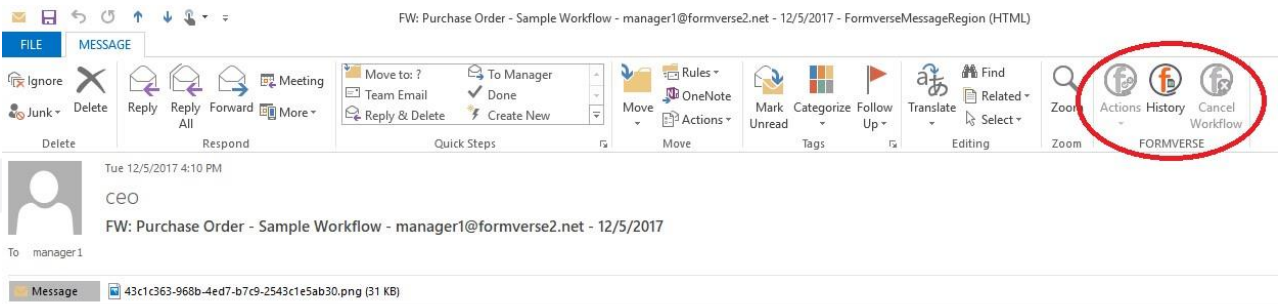
4. When **Yes** is clicked, another window pops up to confirm the cancellation.



Viewing the History of a Workflow:

The **initiator** can view the history of a workflow. The history shows the date and time the forms in the workflow are sent, the actions performed in the workflow, the sender of the forms, and the corresponding recipients, including those who are copied to the form submissions. The recipients are presented as the latest sender in the workflow. The initiator can use this information to search their Outlook Sent folder for emails that were sent for **FORMVERSE** workflows.

1. To view the history of a workflow, open the email that contains the form of a finished or cancelled workflow. This can either be found on the initiator’s “Sent” folder in Outlook or in their Outlook inbox if they are the recipient in the current state of the workflow.
2. On the right-hand side of the Message Ribbon, there are three **FORMVERSE** icons. Click the **History** button.



3. A **FORMVERSE** window appears. Click “Ok” to close this window.

