

automate | capture | integrate



FORMVERSE Web Admin Login & Single User Addition

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FORMVERSE

ABOUT FORMVERSE

FORMVERSE Enterprise Automation Platform allows users to interact with customized & highly-functional automation applications via browser-based access using a mobile device, PC or Mac or from within their existing email system (Outlook or O365). Customers can also configure applications to enable those outside the network, such as customers, prospective customers, vendors, partners or suppliers to interact with applications.

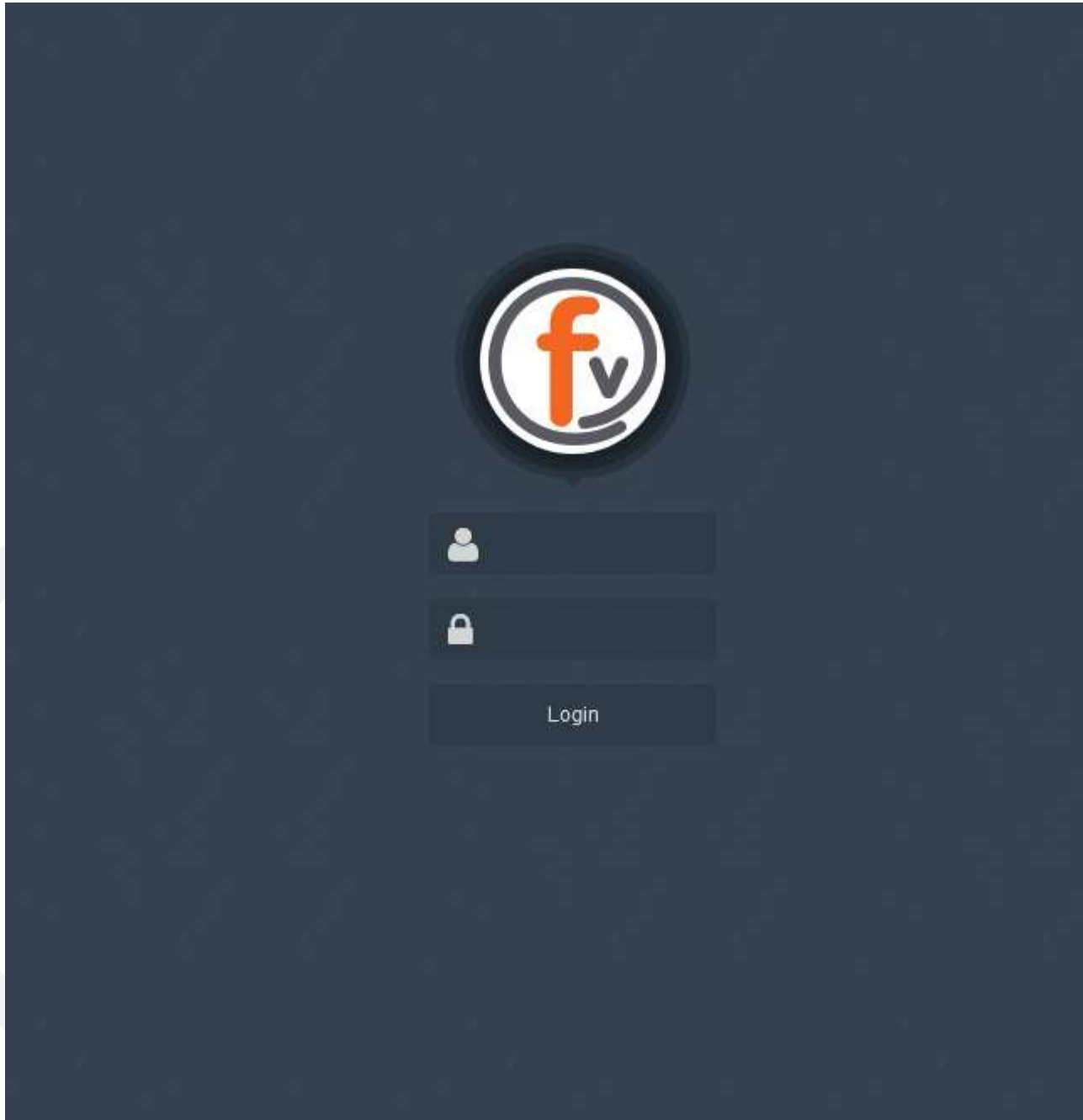
Regardless of the interface, all data, metadata, and attachments are securely stored within the FORMVERSE database (MICROSOFT SQL SERVER), stored data can be made available for custom reporting to authorized users. FORMVERSE's integration platform (FORMVERSE PASSPORT) can further integrate application data bi-directionally into and out almost any other enterprise applications, ERP's, CRM's, Document or Content Management Systems, HRIS and Payroll Systems, Ticketing Systems, and many others.

FORMVERSE provides customers with a flexible approach to running the system. FORMVERSE can be 1) hosted by us 2) installed in a customer's public or private cloud, or 3) installed on-premise in your data center. The method for running FORMVERSE is your choice, based upon your preferences and requirements.

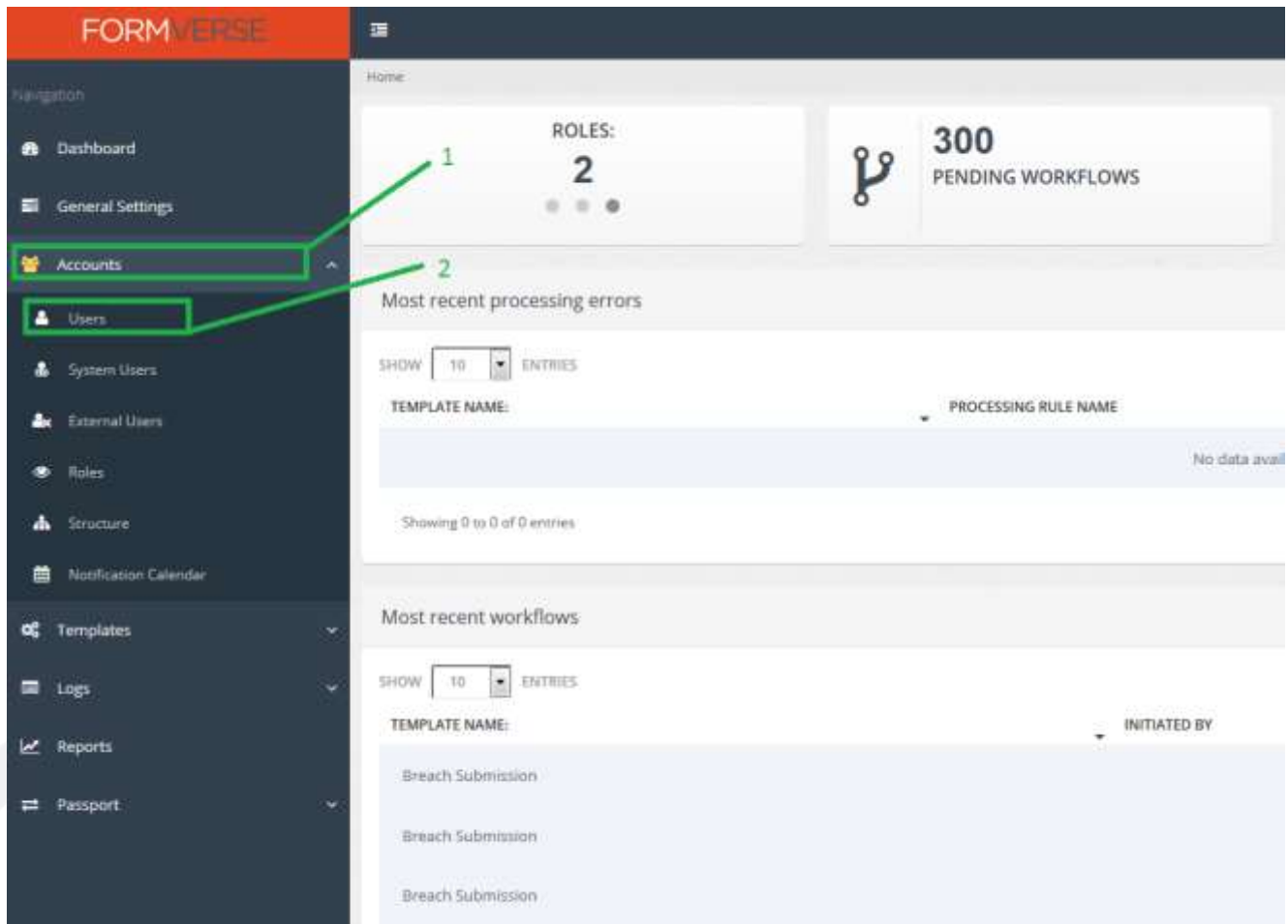
The following pages contain the FORMVERSE Order Form, which describes pricing as well as the terms and conditions of use. Remember, there is never any per-user fees for using FORMVERSE. Pricing is based upon the number of automated applications (Templates).

Welcome to the FORMVERSE Web Admin manual for Logging in & Single User addition. The first step you will take is finding your current Web Admin URL, this will allow you to browse to the Web Admin landing page.

When the page has loaded, please enter your FORMVERSE Web Login, and Password.



Once you have logged into the main landing page you will be redirected to the main dashboard for the Web Admin site. From here you can select the Accounts Drop Down [1], which will expand out different user related functions. For the purpose of this document we will look at the first category [2] the Users Tab.



When you have selected the Users tab you will be directed to the Users management page. From this page you can add Standalone users, edit existing Users, or Delete Existing Users.

Navigation

- Dashboard
- General Settings
- Accounts
 - Users
 - System Users
 - External Users
 - Roles
 - Structure
 - Notification Calendar
- Templates
- Logs
- Reports
- Passport

Home > Accounts > Users

Add
Add stand alone user

Import
Import users form XML file

Users

SHOW 10 ENTRIES

		USER NAME	FIRST NAME
		admin	
		K.	
		C.	

Showing 1 to 3 of 3 entries

When Selecting the “Add Standalone user” you will be directed to the User Creation page.

1. The General Tab (At the top left) is the first page, here you will enter the Users Credentials:
2. User Name: Display Name used in FORMVERSE workflows
3. First Name
4. Last Name
5. Departments
6. Address: Add a single or multiple email, when you have entered the email for the user select the [+] Sign to add their default email used within the FORMVERSE application.
7. WEBAPP Login: This designates the Users Login name to be used by them when using the FORMVERSE Web Portal.
8. System User Indicates if you wish the user to be specifically an Admin user (Access to Web Admin pages)
9. External user is not relevant to NYC DOITT, but this would force this user through the tandem DMZ server (shadow server).

Once You are complete, select the Save Changes button in the bottom right of the screen.

The screenshot displays the 'User Creation' interface in the FORMVERSE application. On the left is a dark sidebar with a navigation menu. The main area is titled 'User roles' and contains a form with the following fields and options:

- User Name:** Text input field with a red border and the text 'This field is required' below it.
- First Name:** Text input field with a red border and the text 'This field is required' below it.
- Last Name:** Text input field with a red border and the text 'This field is required' below it.
- Department:** Text input field.
- Address:** Text input field with a red border and a '+' icon to its right. Below it is the text 'This field is required'.
- WEBAPP Login:** Text input field with a red border and the text 'This field is required' below it.
- System User:** A radio button option.
- External User:** A radio button option.

At the bottom of the form, there is a red 'Cancel' button on the left and a green 'Save Changes' button on the right.

If You wish to Add this user to select groups within the FORMVERSE Application, please select the “User Roles” tab at the top of the table. From here select the appropriate groups the user should belong to and select “Save Changes” in the bottom right.

