automate | capture | integrate

# FORMVERSE USER MANUAL

## Components of the FORMVERSE WebApp

### April 2019

FORMVERSE
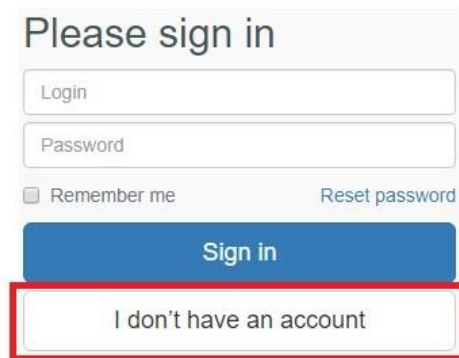
# FORMVERSE User Manual

## Section 1.0 Using the FORMVERSE WebApp

FORMVERSE can also be accessed through a web browser. The same functions done on the FORMVERSE **Outlook Add-In** can be done through the FORMVERSE WebApp. In addition to this, users who do not have a FORMVERSE Account can use the FORMVERSE Web App.

**Section 1.1 Logging In without a FORMVERSE Account**

Users that do not have a FORMVERSE Account can still use the FORMVERSE WebApp. However, the applications that will be available will be limited.

1. To log in to the FORMVERSE WebApp without a FORMVERSE Account, click the "I don't have an account" button on the WebApp login page.

Please sign in

| Login |
| Password |
Remember me          Reset password

**Sign in**

I don't have an account

2. Clicking this button loads another page where the user is prompted to enter an email address. Enter email address and click the "Enter" button.

Please sign in

| Your email |
**Enter**
I have an account

The WebApp Home Page loads. The details of the Home Page are detailed in Section 3 of this manual.

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## Section 2.0 FORMVERSE Account and Password Changes

### Section 2.1 Signing-In for the first time to the FORMVERSE WebApp

When an employee is added as a **FORMVERSE** user by a **FORMVERSE** **Admin**, the employee will receive an email that contains the following **Sign-In** information:

- **User Name**
- **Reset Code**
- **Link to Change Password**

1. To sign in for the first time on the **FORMVERSE WebApp**, click the **Link** to change password. A web browser opens and prompts the user to sign in using the information given on the email mentioned above.
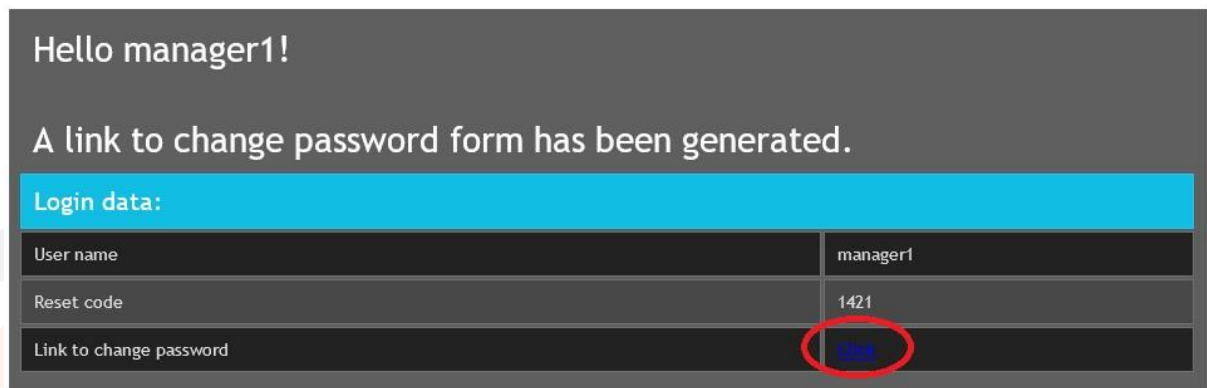


2. Fill in the login information accordingly. Make sure the password created matches the criteria shown on the web page. Once all the fields are filled, click the "Change Password" button.
3. Clicking the "Change Password" button leads to another web page prompting the user to sign in with their username and the password they have just created. Fill out the sign in fields accordingly and click the "Sign in" button.
4. Once signed in, a banner will show on the Home page confirming the successful change of password.



5. Signing in to **FORMVERSE WebApp** thereafter:

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Once the user has signed in for the first time, they can directly go to the **FORMVERSE WebApp** page. They will be prompted to sign in. Fill in the sign in fields accordingly and click the "Sign in" button. Check the "Remember me" check box to keep the sign in credentials when the **FORMVERSE WebApp** page is loaded.

## Section 2.2 Resetting **FORMVERSE** User Password

When a user forgets their password, they can reset their password.

1. To reset password, click the "Reset Password" link below the password field. This sends an email to user identified on the User name field. A banner appears confirming that this email has been sent to the user requesting the password reset.



2. This email looks the same as the email mentioned in **Section 2.1** of this manual. Follow the steps in **Section 2.1** to reset user password.
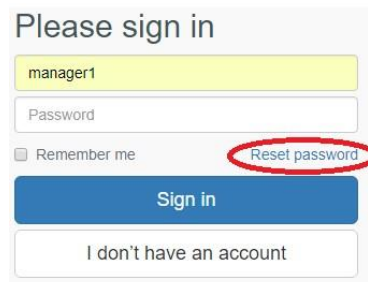
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### Section 2.3 Changing FORMVERSE User Password

The user can also change their password when they are logged in.

1. To change password when logged in, click the **Log out** icon located on the top right corner of the page.
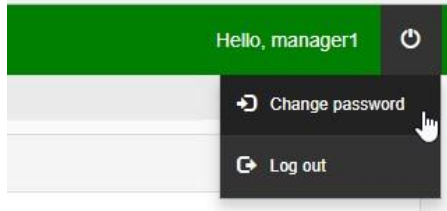


2. Click the "Change password" option. This leads to another page that prompts the user to change password. **The user must know their old password to proceed**. Fill in the fields appropriately and click the "Change password" button.



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## Section 3.0 Home Page

The Home Page is the first page the user sees after signing in to the **FORMVERSE WebApp**. The Home Page can be accessed by clicking the "Home" tab or the **FORMVERSE** logo. The Home Page has the following sections:
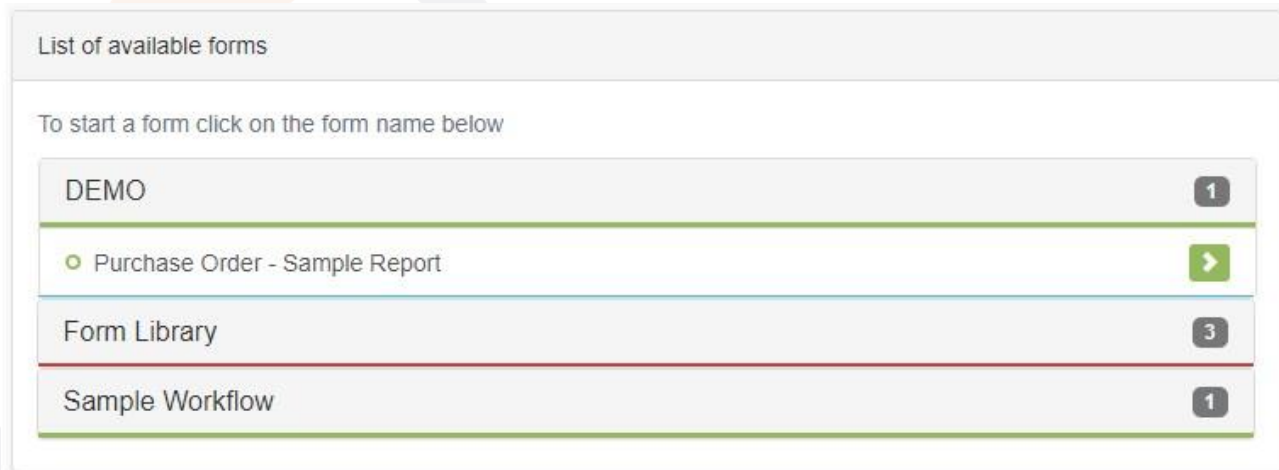
### Section 3.1 Welcome Pane

This pane shows what the user can do in the **FORMVERSE WebApp**.

Welcome to FORMVERSE Forms!

This application allows you to:
1. Start a new form
2. Participate in a workflow
3. Track a workflow status

### Section 3.2 List of Available Applications Pane

This pane shows the categories of applications that the user can initiate. A category can contain multiple applications. Clicking on the category title expands the category and shows all the applications under that category.

List of available forms

To start a form click on the form name below

DEMO                                          1

o Purchase Order - Sample Report            >

Form Library                                  3

Sample Workflow                               1

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## Section 3.3 Initiating a Workflow

1. To initiate a form on the **FORMVERSE WebApp**, click the categories to show the forms under the categories. Choose and click the workflow to be initiated.

2. The form for the chosen workflow loads, allowing the user to fill out the form.

    a. **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 form with these required fields are not filled.

    b. **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.

    c. **Attachments:**

    If files need to be attached to the form, click the yellow "+Add attachment" button found in the bottom section of the page.
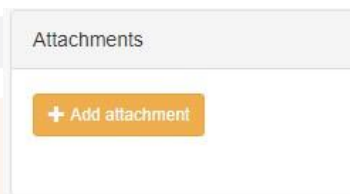


Clicking this button will open an explorer window to allow the user to navigate to the file they would like to attach. After choosing the file to attach, click "Open". The file name of the attachment, the file size, and a remove button will appear on the Attachments sections.

To remove a certain attachment, click the remove button.



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3. Once the form is filled, submit the form by clicking the green "Submit" button found on the bottom of the page.

4. The submission is complete when the Thank You page is loaded.
   a. On this page, the sender and recipient(s) of the form are shown.
   b. The Thank You page is also a confirmation that the form submission is complete.
   c. If the user does not see the Thank You page, for example if they closed the browser while the Thank you page is being loaded, it means the submission is not complete. **Make sure to wait for the Thank you page to be loaded before navigating away or closing the browser**.

Thank you! Your form has been submitted.

| ❶ Email was sent to the following users: | | ✉ Details of your message | |
|---|---|---|---|
| To: | ceo@formverse2.net | Your Email Address: | manager1@formverse2.net |
| CC: | | Subject: | NEW EMPLOYEE CREATION - JANE DOE |
| BCC: | | Date: | 2018-01-16 04:36 |

Back to forms

To **Cancel** the initiation of the form before submitting, click the red "Cancel" button found on the bottom of the page or navigate away from the page by clicking the back button or any other of the tabs in the **FORMVERSE WebApp**.

### Section 3.4 User Summary Pane

This pane shows the **Login** Username, First **Name**, **Last Name**, **Email**, and the **Roles** of the user that is currently logged in.

The role determines which applications the user can initiate and what attachments they can access.

The roles are set by the **FORMVERSE** Admin.

| ❶ User summary | |
|---|---|
| Login | manager2 |
| Name | Manager |
| Last name | |
| Email | manager2@formverse2.net |
| Roles | Finance, FV Purchase Req Users, Manager, FV Vendor Users |

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**Section 3.5 Recent Workflows Pane**

This pane shows some of the details of the most recent workflows that user has initiated. It shows the application **Name**, the **Status** of the workflow, and the date and time the workflow was **Updated**.

The rows are arranged by the date and time the applications were updated with the latest activity on the top.



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# Section 4.0 History Page

The History Page can be accessed by clicking the "History" tab. On this page, the user can see all the applications they initiated.

The current logged in user who initiated an application does not see the history of the workflows on the History page of the other users. **Only the initiator** can see the history of the applications they initiated.



### Section 4.1 History Tab Filters

**The user can filter the application's workflow rows by the following criteria:**

- **Initiated** date, this is the date the user started and sent an application.
- **Updated** date, this is the date of the latest activity done on the application.
- **Number** of entries shown in page, "Show 10 entries".
- Keyword **Search**, the user can enter keywords that appear on the application's name, subject, recipient, status, date initiated, or date updated.
- **Arrangement** criteria, the user can click on the History page table headers to arrange application workflows in ascending or descending order. A purple arrow beside the table header name indicates how the rows are arranged.

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**Section 4.2 Viewing the History of a Workflow**

1. To view the history of a workflow in the History Page, find the workflow of interest using the filters mentioned in previous section.

2. Once the workflow is found, click the blue "View history" button for that workflow.



3. Clicking this button leads to the overview of the history of the workflow, showing the sender of the form for each action, the actions taken in the workflow and the corresponding date and time, and the email subject.
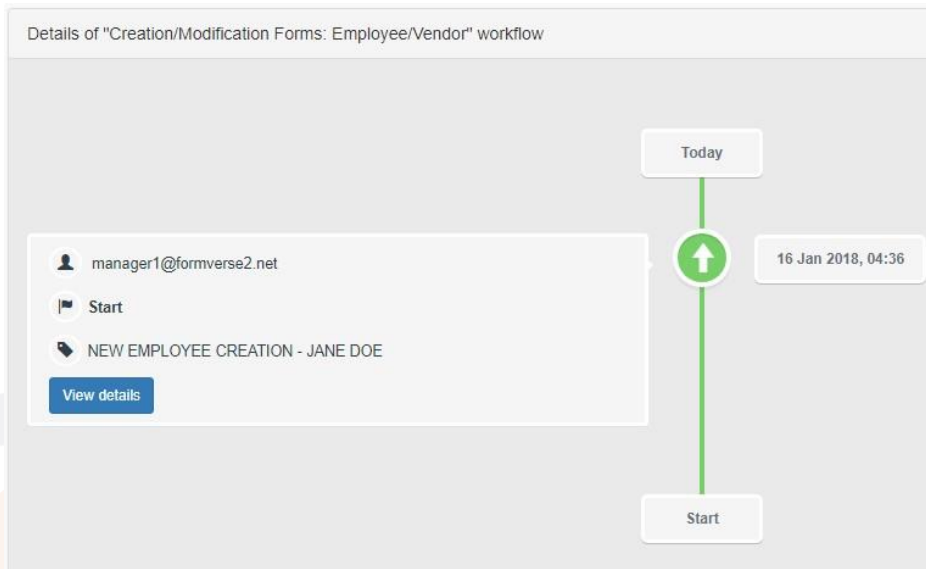


4. A dark blue "View Details" button is available for each action in the workflow. Clicking this button leads to a new page that shows the submitted form and the message details for that action.

5. To go back to the workflow history overview from the submitted form page, click the red "Back to History" button found on the bottom of the page, or the back button of the browser.

6. To go back to the history dashboard from the workflow history overview, click the red "Back to History" button found on the bottom of the page, or the back button of the browser.

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**Section 4.3 Cancelling a Workflow**

Cancelling a workflow can be done in the History page of the **FORMVERSE WebApp**.

1. To cancel a workflow, find the workflow to be cancelled using the filters mentioned in section 2.6.1. of this manual.

2. Once the workflow is found, click the cancel button under the "Cancel Workflow" column for that workflow. A warning window will pop up to verify the cancellation of the workflow.

| | Form | Subject | Recipient | Status | Cancel Workflow | Initiated | Updated |
|---|---|---|---|---|---|---|---|
| View history | Creation/Modification Forms: Employee/Vendor | NEW EMPLOYEE CREATION - JANE DOE | ceo@formverse2.net | Pending... | ⊗ | 2018-01-16 04:36 | 2018-01-16 04:36 |

**FORMVERSE** ✕

Are you sure you want to cancel this workflow? This cannot be undone.

No  Yes

3. Click "Yes" on the warning window to cancel the workflow. A banner on top of the page appears to confirm the cancellation of the workflow. The workflow is then removed on the History page table.

The workflow has been successfully cancelled. ✕

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# Section 5.0 Action Required Page

The Action Required page can be accessed by clicking the "Action Required" tab. On this page, the user can see all the workflows they are required to take an **Action** on.
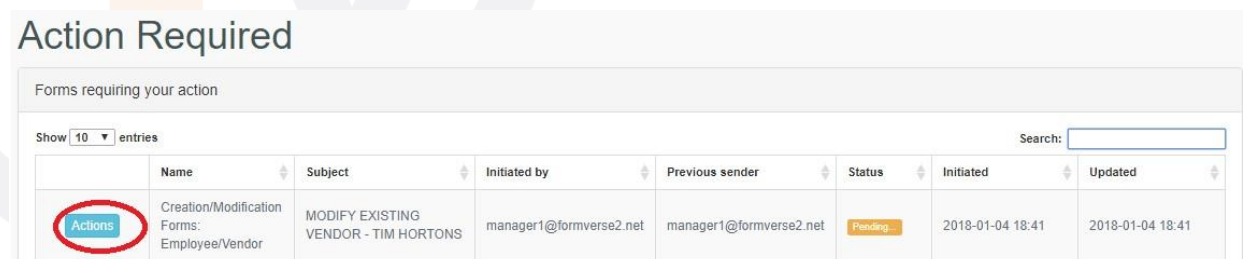
**These workflows are shown on a table where the following workflow information is detailed:**

1. Application Name
2. Email Subject
3. Workflow Initiator
4. Previous Sender
5. Status
6. Date Initiated
7. Date Updated

The user can choose how many entries are shown in the page and search for keywords that can be seen in the workflow details previously mentioned.

## Section 5.1 Taking an Action on a Form

2. To take an **Action** on a workflow, find the workflow of interest by using the keyword search bar or by arranging the workflows based on the column headings of the **Action Required** table.
3. Once the workflow is found, click the blue "Actions" button for that workflow. Clicking this button leads to a new page where the forms of previous workflow states are shown. This allows the user to review the previously submitted forms and help them decide what action to take.

## Action Required

Forms requiring your action

Show 10 ▼ entries                                                                    Search:

| | Name | Subject | Initiated by | Previous sender | Status | Initiated | Updated |
|---|---|---|---|---|---|---|---|
| Actions | Creation/Modification Forms: Employee/Vendor | MODIFY EXISTING VENDOR - TIM HORTONS | manager1@formverse2.net | manager1@formverse2.net | Pending... | 2018-01-04 18:41 | 2018-01-04 18:41 |

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4. The actions available to the user are presented on the top and the bottom of the page as yellow buttons they can click. Choose and click the **Action** chosen.



5. Clicking the **Action** button leads to another page where the form associated to the chosen action loads. Fill out the form and attach any files accordingly.

6. Once the form is filled, submit the form by clicking the green "Submit" button found on the bottom of the page.

7. The submission is complete when the Thank You page is loaded.
   a. On this page, the sender and recipient(s) of the form are shown.
   b. The Thank You page is also a confirmation that the form submission is complete.
   c. If the user does not see the Thank You page, for example if they closed the browser while the Thank you page is being loaded, it means the submission is not complete. **Make sure to wait for the Thank you page to be loaded before navigating away or closing the browser**.

8. To cancel a submission, click the red "Cancel" button found on the bottom of the page or navigate away from the page by clicking the back button or any other of the tabs in the **FORMVERSE WebApp**.

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## Section 6.0 Delegates Page

### Section 6.1 Delegates

The Delegates page can be accessed by clicking the "Delegates" tab. On this page, the user can delegate workflow duties to another user when the user is unavailable. This ensures that workflows are not disrupted when a user involved in the workflow is away and prevents accumulation of unactioned workflows. This can only be done through the **FORMVERSE WebApp**.



1. To assign delegates, determine the dates when the user is unavailable.
2. Find the categories of the workflows that needs to be delegated.
   a. The user can use the search bar to search for a particular category.
   b. Check the "Enabled" box for these categories.
3. Determine the deputy for each category that is enabled. Use the dropdown to choose which **FORMVERSE** user would be assigned as deputy.
   a. This can be done by batch using the "Set default deputy" button found on the top right corner of the Delegates page.
   b. To change all the deputy for all categories to one person in one batch, choose the default deputy using the dropdown beside the "Set default deputy" button.
   c. Once the deputy is chosen, click the button.
4. Once all the appropriate fields are chosen, click the "Submit" button located on the bottom of the page.

5. If the user has workflows awaiting **Actions**, a yellow warning banner will appear on top of the page to indicate how many current workflows require an action from the user.
    a. This is to warn the user that these unactioned workflows did not transfer to the deputy that was just assigned.
    b. The deputy only receives workflow submissions after the user sets the delegates.
    c. These unactioned workflows will remain in the **Actions Required** tab of the user.

> You currently have 15 workflow(s) awaiting your action.                                    ×

6. To disable delegates before a previously assigned delegation date passes, click the "Disable delegates" button beside the delegation date fields and then click "Submit".
    a. The user must click the "Submit" button to disable the delegates.
    b. To make sure that the delegates are properly disabled, navigate away from the Delegates page and then navigate back to the Delegates.
    c. The user should see blank delegation date fields if the delegation is properly disabled.

## Section 7.0 Reports Page

A feature to be implemented in the future.

## Section 8.0 Questions & Answers Page

The Questions and Answers page can be accessed by clicking the "Q&A" tab. On this page, the user can access FAQs and relevant documents that **FORMVERSE** Admin's have created to help the user with their **FORMVERSE Applications**.

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