

Installing the Agiloft Contract Assistant for Word

Consult this page for information about how to install the Agiloft Contract Assistant for Word, after configuring the app in your KB.

You may need to sign out of your Microsoft O365 account and then sign back in for the app to appear after installation.

Choosing an Installation Method

This section contains information about the two preferred installation methods. Both of these methods involve accessing the app from the Office Add-in store. If you don't see the Store tab in the Add-in manager, you may need to turn on connected experiences.

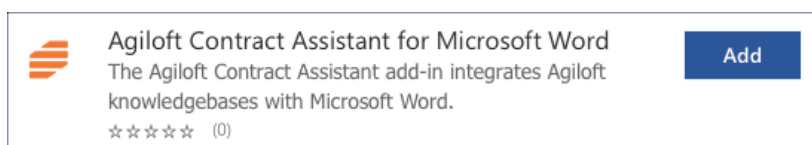
The two methods in this section are only available in Release 23 and beyond. If your KB is running a version of Agiloft prior to Release 23, or cannot access the Office Add-in store, visit [Alternative Installation Methods](#).

Office Add-in Store

The best way for an individual user to install the Agiloft app for Word is to download it from the Office Add-in store.

To install the add-in:

1. Open Microsoft Word.
2. Click Get Add-ins.
3. Click the Store tab.
4. Search for Agiloft and select it when it appears.
5. Click Add.



O365

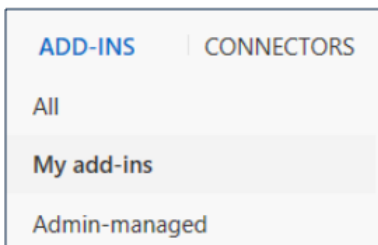
The best way to install the app for many users at once is through an O365 access group. You can also use this method for individual installation by creating an O365 group and including one user. This method is generally performed by an Office admin who can download the app from the Office Add-in store.

To install:

1. Log in to O365 as an admin and follow Microsoft's [how-to documentation on deploying add-ins in the admin center](#).
2. Once you get to step 3 in the Microsoft documentation, click Choose from Store.
3. Search for Agiloft and click the app.
4. Click Add.
5. Click Continue.
6. Proceed to step 5 of the Microsoft documentation.
 - a. Under Assign Users, if this is the initial installation, choose either "Just me" or "Specific users/groups" instead of "Everyone" in order to test the app before full deployment. Testing with a small group of users usually consists of a small set of business stakeholders or users from your IT department.
 - b. Under Deployment Method, choose if the app will appear by default, or if designated users need to install it.
7. Complete the remaining steps of the Microsoft documentation.

If you chose the "Available" option in step 6b, your users need to complete the additional three steps below. If you chose a different option, it can take up to 24 hours for the app to appear on user ribbons.

1. Open Microsoft Word.
 - For Desktop, open the Home ribbon and click Get Add-ins on Mac or Browse Add-ins on PC.
 - For Web, click the three dots found on the far-right of an email message and click Get Add-Ins.
2. Click Admin-managed.



3. Click the Agiloft app and click Add.

Alternative Installation Methods

This section contains information about the two alternative installation methods. Both of these methods involve installing the app with a manifest file. If you don't already have a manifest file, you can find that information in the Download Manifest section of [Configuring the Agiloft Contract Assistant](#).

The two methods in this section are only used if your KB is running a version of Agiloft prior to Release 23, or you cannot access the Office Add-in store.

O365 with Manifest File

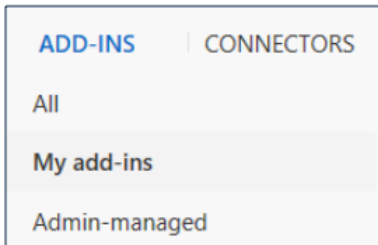
The best alternative way to deploy the app to multiple users, or a single user, is by adding a manifest file to an O365 access group and adding the users to that group.

1. Open the [Microsoft documentation](#) and complete steps 1 and 2 of "Deploy an Office Add-in using the admin center".
2. To complete step 3, follow these substeps:
 - a. Click Upload custom apps.
 - b. Select the "I have the manifest file (.xml) on this device" option.
 - c. Select the manifest file.
 - d. Click Upload.
3. When you reach step 5 of the Microsoft documentation:
 - a. Under Assign Users, if this is the initial installation, choose either "Just me" or "Specific users/groups" instead of "Everyone" in order to test the app before full deployment. Testing with a small group of users usually consists of a small set of business stakeholders or users from your IT department.
 - b. Under Deployment Method, choose if the app will appear by default, or if designated users need to install it.
4. Complete the remaining steps of the Microsoft documentation.


If you chose the "Available" option in step 3b, your users need to complete the additional three steps below. If you chose a different option, it can take up to 24 hours for the app to appear on user ribbons.

1. Open Microsoft Word.
 - For Desktop, open the Home ribbon and click Get Add-ins on Mac or Browse Add-ins on PC.
 - For Web, click the three dots found on the far-right of an email message and click Get Add-Ins.

2. Click Admin-managed.



3. Click the Agiloft app and click Add.

 To use either O365 installation method, ensure that the relevant user groups are selected in the REST groups multi-choice field at **Setup > System > Manage Web Services**.

Local Installation with Manifest File

Another alternative way for an individual user to install the app uses a zip file and a manifest file. This method should only be used if no other methods are possible, and is generally for an individual user who can't access the Office Add-in store or doesn't have access to an O365 access group or admin. This method is not compatible with Mac computers.

To install the app:

1. Check the Local Disk section of your File Explorer to see if you have a folder called `C:\AgiloftWordAddIn`. If you do, skip to step 6 below. Otherwise, you must have admin permissions or an admin available to assist you for steps 2 and 3. Log into Windows as the user who requires access to the app.
2. Run the `ShareFolder_byAdmin.bat` script by right-clicking the script file and clicking "Run as Administrator" from the drop-down list.
3. If a warning appears, click More Info. Click the Run Anyway button at the bottom right of the window.
4. Run the `ConfigureWordAddin_byUser.bat` script.
5. If a warning appears, click More Info. Click the Run Anyway button at the bottom right of the window.
6. Add the manifest file to the `C:\AgiloftWordAddIn Shared Folder`.
7. Restart Microsoft Word.
8. Once Microsoft Word re-opens, click the Insert tab.
9. Click Add-ins, and then click My Add-ins.
10. Click Shared Folder. If the Shared Folder tab is missing from the add-in manager, there may be an issue with the Trust Center Settings for the shared folder's network path. For more information, visit the Microsoft Word Trust Center Settings section of [Troubleshooting the Agiloft Contract Assistant](#).
11. Select the Agiloft icon. Press the Add button in the lower right corner of the window, and then click Close.
12. Check the Home tab of the ribbon in Microsoft Word to ensure that the app was added successfully.

