Installing the Agiloft Contract Assistant for Outlook

Consult this page for information about how to install the Agiloft Contract Assistant for Outlook, 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:

- In the Outlook desktop app, you can find the Agiloft app on the far right-hand side of the Home tab.
- In the web version of Outlook, you can find the Agiloft app using the three-dot menu on the right-hand side of an open email, near the Reply buttons.

Choosing an Installation Method

The following sections contain 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 you are not running 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 Outlook is to download it from the Office Add-in store.

To install the add-in:

1. Open Microsoft Outlook.
2. Click Get Add-ins.
3. Click the Store tab.
4. Search for Agiloft and select it when it appears.
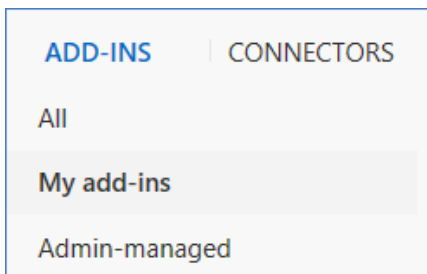5. Click Add.
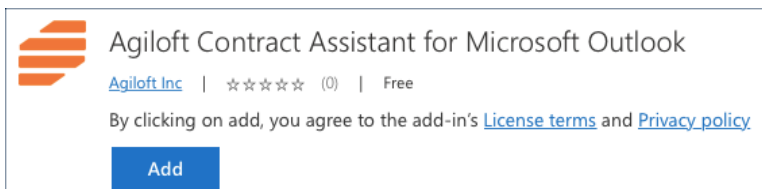
O365

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, you should usually 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, you can choose if the app will appear by default, or if designated users need to install it.
   c. If prompted, click Accept to grant the necessary permissions. This grants Agiloft access to the email server in order to access the user's mailbox. It does not grant access to all your users' mailboxes.

If you chose the "Available" option in step 6b, your users need to complete the three substeps 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 Outlook.
   - 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.

My add-ins

3. Click the Agiloft app and click Add.

Alternative Installation Methods

This sections contains information about three alternative installation methods.

These alternative methods involve installing the app using a URL or a manifest file. The URL method is only available in Release 23 and beyond.

Consult the sections below for installation methods that don't require access to the Office Add-in store. While app functionality isn't compromised, installations using manifest files should only be considered as a last resort due to complexity.

- If you need to install the app for multiple users, consult the O365 section and use the URL.
- If you need to install the app individually, consult the Local Installation with URL section.
- If you are running a version of Agiloft prior to release 23 and need to add multiple users, consult the O365 section and use a manifest file.
- If you are running a version of Agiloft prior to release 23 and need to install the app individually, consult the Local Installation with Manifest File section.

O365 with URL or Manifest File

The best alternative way to install the app for multiple users is with an O365 access group and a URL. If you can't use a URL, you can instead use a manifest file.

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 in the Microsoft documentation, follow these substeps:
   a. Click Upload custom apps.
   b. If you are using a URL, paste this URL: https://outlookaddin.agiloft.com/manifest.xml. If you are using a manifest file, upload the correct manifest file.
   c. Click Upload.
3. Proceed to step 5 of the Microsoft documentation.
   a. Under Assign Users, if this is the initial installation, you should usually 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, you can 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 an additional process for the app to appear. If you chose a different option, it can take up to 24 hours for the app to appear on user ribbons.

1. Open Microsoft Outlook.
   - 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.
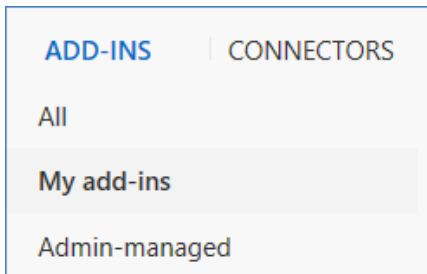
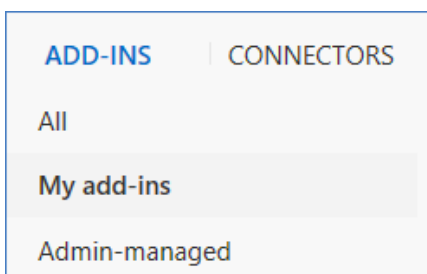My add-ins

3. Click the Agiloft app and click Add.

> ⚠ To use this installation method, ensure that the group in question is selected in the REST groups multi-choice field at **Setup > System > Manage Web Services**.

Local Installation with URL

The best alternative way to install the app for an individual user is with these steps.

1. Copy this URL: https://outlookaddin.agiloft.com/manifest.xml
2. Open Microsoft Outlook.
   - For Desktop, open the Home ribbon and click Get Add-ins.
   - For Web, click the three dots found on the far-right of an email message and click Get Add-Ins.
3. Click My add-ins.

My add-ins

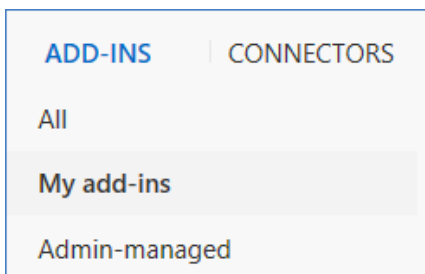4. Scroll down and click Add a custom add-in.
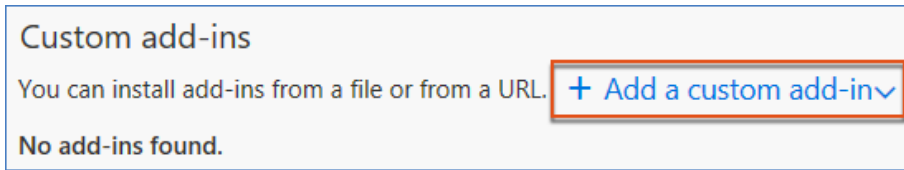
Add a custom add-in

5. Click Add from link.
6. Paste the URL from step 1 into the URL field.
7. Restart Outlook. Make sure the Agiloft icon appears either on the Home ribbon for Desktop or as an option under the three dots to the far-right of an email message for Web.

# Local Installation with Manifest File

If you can't use a URL, and want to install the app locally, follow the steps below.

1. Make sure you have a copy of the manifest file saved in an easily accessible location.
2. Open Microsoft Outlook.
   - For Desktop, open the Home ribbon and click Get Add-ins.
   - For Web, click the three dots found on the far-right of an email message and click Get Add-Ins.
3. Click My add-ins.

My add-ins

4. Scroll down the page and click Add a custom add-in.
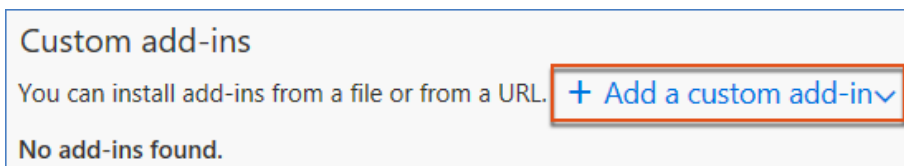
Add a custom add-in

5. Click Add from file...
6. Locate the manifest file and select it.
7. Restart Outlook. Make sure the Agiloft icon appears either on the Home ribbon for Desktop or as an option under the three dots to the far-right of an email message for Web.