

SharePoint Document Merge Workflow

Install Wsp

To install the solution first it need to be added by SharePoint 2013 Management Shell, for that

1. Run the SharePoint Management Shell as administrator
2. Write the following the command
 - a. Add-spsolution –literalpath “d:\path to the .wsp file including wsp file”
 - b. Eg. Add-spsolution –literalpath “d: \SDM.Workflow.CustomActivities.wsp”

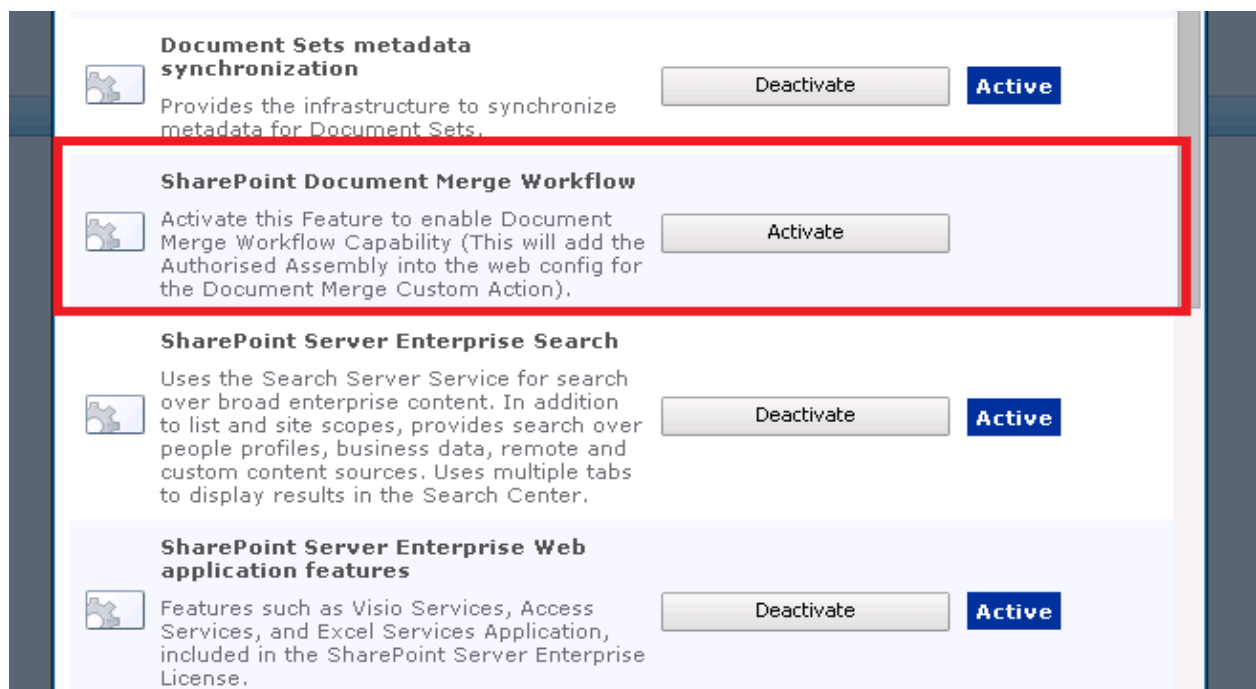
After that,

1. Open central administrator site as administrator (SharePoint 2013 Central Administration > right click > run as administrator)
2. Go to System settings > Manage Farm Solutions (under Farm Management)
3. Select SDM.Workflow.CustomActivities.wsp> Deploy Solution > click on Ok

Activate Feature

Go to Central Admin then click on Application Management, then select the webapplication and click on Manage Features.

- Activate following feature on the web application, in which you want Document Merge Workflow functionality.



The screenshot displays the 'Manage Features' page in SharePoint Central Administration. It lists several features with their descriptions and status controls. The 'SharePoint Document Merge Workflow' feature is highlighted with a red rectangular box. The other features shown are 'Document Sets metadata synchronization', 'SharePoint Server Enterprise Search', and 'SharePoint Server Enterprise Web application features'. Each feature has a 'Deactivate' button and an 'Active' button (where applicable).

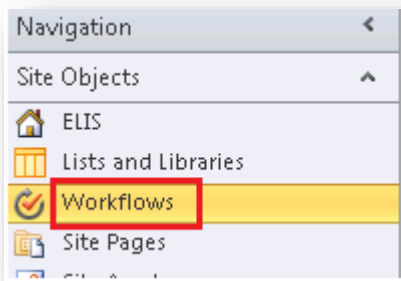
Feature Name	Description	Deactivate	Active
Document Sets metadata synchronization	Provides the infrastructure to synchronize metadata for Document Sets.	Deactivate	Active
SharePoint Document Merge Workflow	Activate this Feature to enable Document Merge Workflow Capability (This will add the Authorised Assembly into the web config for the Document Merge Custom Action).	Activate	
SharePoint Server Enterprise Search	Uses the Search Server Service for search over broad enterprise content. In addition to list and site scopes, provides search over people profiles, business data, remote and custom content sources. Uses multiple tabs to display results in the Search Center.	Deactivate	Active
SharePoint Server Enterprise Web application features	Features such as Visio Services, Access Services, and Excel Services Application, included in the SharePoint Server Enterprise License.	Deactivate	Active

Create Workflow

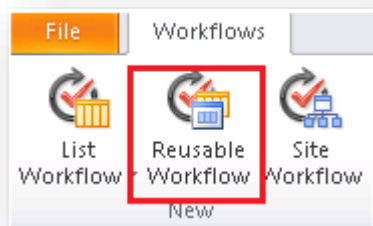
- Create one SharePoint List. Create columns as per user requirements with below mentioned data types.

Column (click to edit)	Type
Title	Single line of text
Source	Single line of text
Destination	Single line of text
SaveAsPdf	Yes/No
OutPutFileName	Single line of text
OverWrite	Yes/No
DisplayImage	Yes/No
FirstName	Single line of text
LastName	Single line of text
Created By	Person or Group
Modified By	Person or Group

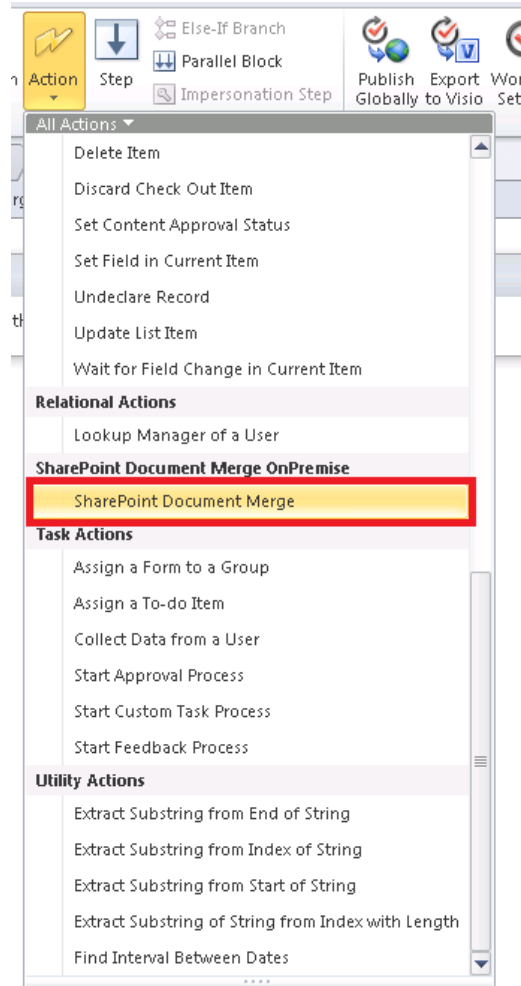
- Open SharePoint 2010 Designer.
- Select workflow from left panel



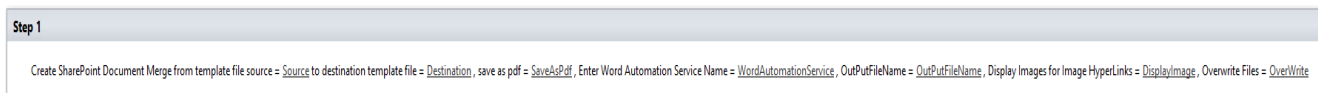
- User has to create reusable workflow and in that add workflow action



- User has to add workflow action from action menu



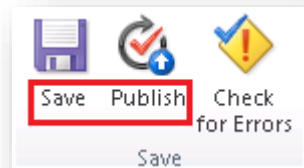
- Set fields same as below screen



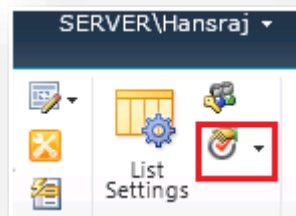
Fields,

- **User will have use internal names of fields created in the list as mentioned above.**
- **Source:**
 - o User have to enter name of the field which will contain Source Template Path in the list.
e.g. Source (simple text input of name of the field)
- **Destination Template file**
 - o In Destination, user have to add name of the field which will hold Destination Library Name. e.g. Destination (simple text input of name of the field)
- **Word Automation Service**

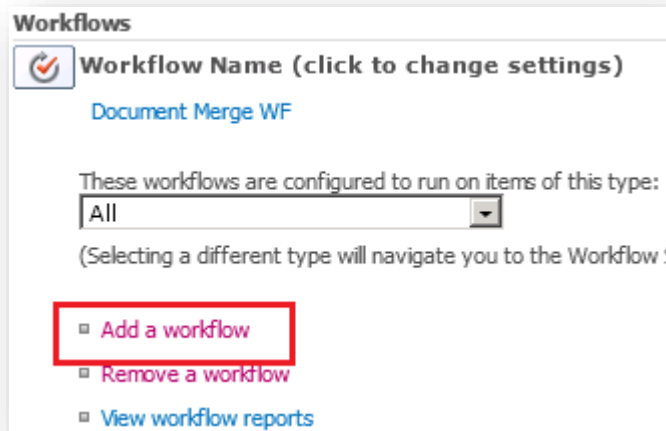
- In word automation service, user have to provide a simple text input of the name of Word Automation Service created in Central Admin
- **Save as pdf**
 - In Save as pdf, user have to set name of the field which will hold the value whether user wants to Save As PDF or not. e.g. SaveAsPDF (simple text input of name of the field)
- **OutputFileName**
 - In OutPutFileName, user have to set the name of the field which will hold the value for Output file name. e.g. OutPutFileName (simple text input of name of the field)
- **Display Images for Image HyperLinks**
 - In this field user have to set whether he would like to display hyperlinks as images. Set the name of the list field which will hold the value for that. E.g DisplayImage (simple text input of name of the field)
- **Overwrite Files**
 - In this field user has to set name of the field which will hold the value whether user wants to overwrite files or not (simple text input of name of the field)
- Click on save button from ribbon and click on Publish button from ribbon.
- After publish user will have Workflow on site.



- Go to Created SharePoint List
- Open SharePoint workflow setting of list from ribbon



- Add workflow on list with in workflow setting. Please refer below screen shot
- Click on "Add a Workflow" link button



- Select publish workflow form list box and enter workflow name and checked checkbox options.
- Click on OK button.
- Please refer below screen shot

Select a workflow template:

UATSIT Workflow 6
DocumentMergeWF
 UAT Workflow 3
 Producer Workflow 17

Description:

Type a unique name for this workflow:
 Document Merge WF

Select a task list:
 Tasks

Description:
 Use the Tasks list to keep track of work that you or your team needs to complete.

Select a history list:
 Workflow History

Description:
 History list for workflow.

Allow this workflow to be manually started by an authenticated user with Edit Item permissions.
 Require Manage Lists Permissions to start the workflow.

Start this workflow to approve publishing a major version of an item.

Start this workflow when a new item is created.

Start this workflow when an item is changed.

OK Cancel

- User has to create to document library. One for Template file and second to save document
- Add new Item in list
- All other values are self-explanatory except OutPutFileName
 - o You can leave OutPutFileName blank or enter field name of the column which you want as the output file name. If you leave it as blank, then the output file name will be like "filename_timestamp" if you enter something like "<<Title>>" then output file name will be like "filename_Test Title1"

Title	Source	Destination	SaveAsPdf	OutPutFileName	OverWrite	DisplayImage	FirstName	LastName	DM Workflow
Title	Shared%20Documents/DM_Template.docx	Shared Documents	No	<<Title>>	Yes	No	Jon	Doe	Completed