

SharePoint 2013 Document Merge Workflow (On-Premise)

Deployment Steps

- Workflow Manager box
 - o Copy activity assembly (SDM15.OnPrem.Workflow.CustomActivity.dll) to following locations:
 - %ProgramFiles%\Workflow Manager\1.0\Workflow\Artifacts
 - %ProgramFiles%\Workflow Manager\1.0\Workflow\WFWebRoot\bin
 - o Add your activity class to the white-list
 - Copy AllowedType.xml file to above two locations if not already present there. Else Copy portion between <AllowedTypes></AllowedTypes> from the given file and paste it under <AllowedTypes></AllowedTypes> portion in the files available at above two locations.
 - o Restart “Workflow Manager backend” service by
 - net stop WorkflowServiceBackend and net start WorkflowServiceBackend commands
- SharePoint box
 - o Copy DocumentFormat.OpenXml.dll assembly to SharePoint box and GAC it
C:\Windows\system32>gacutil.exe -i “Path”
 - o Copy GemBox.Document.dll assembly to SharePoint box and GAC it
C:\Windows\system32>gacutil.exe -i “Path”
 - o Copy GemBox.Spreadsheet.dll assembly to SharePoint box and GAC it
C:\Windows\system32>gacutil.exe -i “Path”
 - o Copy activity assembly (SDM15.OnPrem.Workflow.CustomActivity.dll) to SharePoint box and GAC it
C:\Windows\system32>gacutil.exe -i “Path”
 - o Add a new .actions4 file (DocumentMergeCodeActivity.actions4) to
%CommonProgramFiles%\Microsoft Shared\Web Server Extensions\15\TEMPLATE\1033\Workflow (need top-level node)
 - o Reset IIS
- Client
 - o Clean up SPD cache (%LocalAppdata%\Microsoft\WebsiteCache)
 - o User can also run given batch file to clean cache (clearCache.bat)
- After that you will get workflow action in SharePoint Designer.

Create Workflow

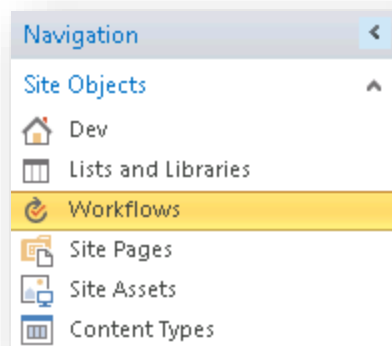
- Create one SharePoint List. Create columns as per requirements.

Columns

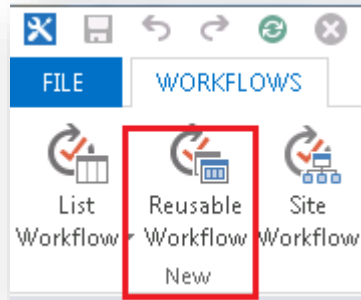
A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type
Title	Single line of text
Source	Single line of text
Destination	Single line of text
OutputFileName	Single line of text
DisplayImage	Yes/No
OverWrite	Yes/No
FirstName	Single line of text
LastName	Single line of text
SaveAsPDF	Yes/No
Document Merge WF	Hyperlink or Picture
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group


- Open SharePoint 2013 Designer.
- Select workflow from left panel



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



Create Reusable Workflow [?] [X]

 Add a new reusable workflow to your site

Enter a name and description for your new workflow

Name:

Description:

Pick a base content type to limit this workflow to

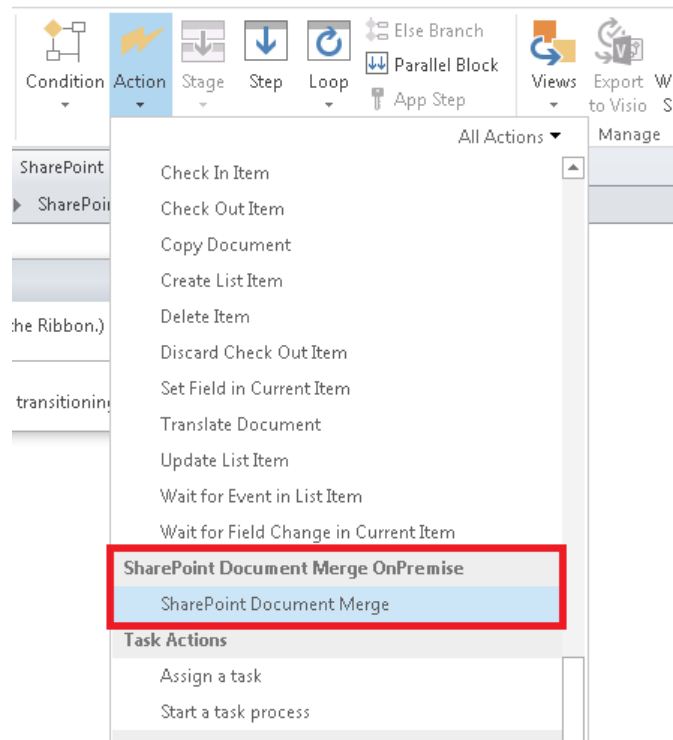
Content Type:

Choose the platform to build your workflow on

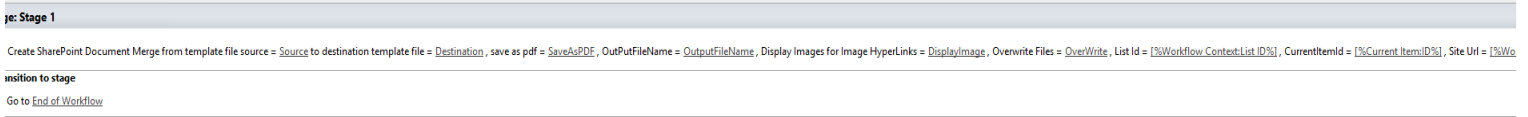
Platform Type:

OK Cancel

- User has to add workflow action from action menu



- Set fields same as below screen, user has to enter column names in respective fields



Fields,

- **Source:**
 - User have to add 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**
 - 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)
- **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 has to set 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 has to set whether he would like to display hyperlinks as images. E.g DisplayImage (simple text input of name of the field)
- **Overwrite File**
 - 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)
- **List Id**
 - In List Id, user have to set Current List Id. This can be done as displayed below.

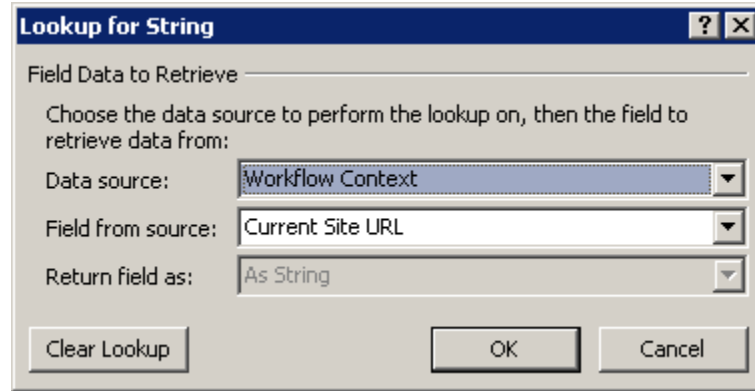
nt Document Merge from template file source = Source to destination template file = Destination, save as pdf = SaveAsPDF, OutPutFileName = OutputFileName, Display Images for Image HyperLinks = DisplayImage, Overwrite Files = OverWrite, List Id =



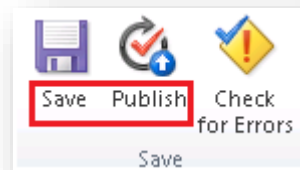
- Click on the blank space after List Id and then click on fx. Then Select Following values in the Dialog box. And click on Ok

- **Current Item Id**
 - For Current Item Id select following values from the dialog box.

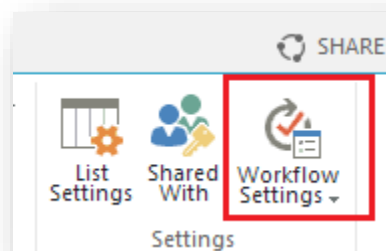
- **Site Url**
 - For Site Url select following values from the dialog box



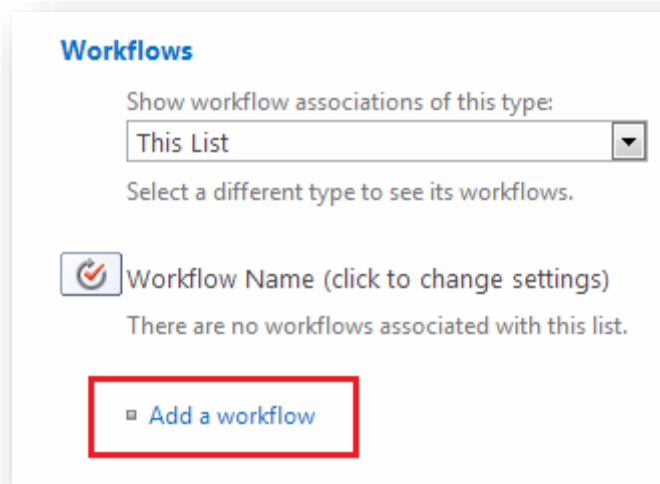
- Then, click on save button from ribbon and click on Publish button from ribbon.
- After publish user will have Workflow on site.



- 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

Workflow
Select a workflow to add to this list. If a workflow is missing from the list, your site administrator may have to publish or activate it

Select a workflow template:
Disposition Approval
Three-state
Document Merge WF

Description:
Manages document expiration and retention by allowing participants to decide whether to retain or delete expired documents.

Name
Enter a name for this workflow. The name identifies this workflow.
Enter a unique name for this workflow:
Document Merge WF

Task List
Select the name of the task list to use with this workflow, or create a new one.
Select a task list: Tasks
Description:

History List
Select the name of the history list to use with this workflow, or create a new one.
Select a history list: Workflow History
Description: History list for workflow.

Start Options
Specify how this workflow can be started.

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.

Creating a new item will start this workflow.

Changing an item will start this workflow.

OK Cancel

- User has to create to document library. One for Template file and second to save document
- Add new Item in list with values as below
- All other values are self-explanatory except OutPutFileName
 - 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	OutputFileName	DisplayImage	OverWrite	FirstName	LastName	SaveAsPDF	Document Merge WF
	Tite1 ✖	... Shared Documents\DM_Template.docx	TestLib	Test<<Title>>	Yes	No	Jon	Doe	No	Stage 1