

## 1. Word to PDF Converter

This is a SharePoint standalone feature to allow users to convert their Word document (\*.docx) into a PDF file. The default destination location of the target PDF file will be stored in the same location in the document library where the origin Word document is found.

There are two version of Word to PDF converter as specified below. Choose which one is appropriate for the client's requirement.

Title	Solution Package Filename	Description
Custom Menu PDF Converter	rcr.wordpdfconverter.wsp	Converts a Word document to a PDF file by invoking this feature from the custom menu
Sequential Workflow PDF Converter	rcr.wf.pdfconverter.wsp	Workflow that runs in the background to convert Word document to a PDF file either by: <ul style="list-style-type: none"><li>• New word document is added</li><li>• Existing word document is updated</li><li>• Manually run the workflow</li></ul>

## 2. Installation

### Pre-requisite

Prior to installing the Word to PDF Converter, the SharePoint Framework Windows solution package (WSP) MUST be installed in Central Administration:

Run a PowerShell script that will deploy the Windows Solution Package (WSP) file called

- **rcr.sp.framework.wsp**

A successful installation on the SharePoint farm will deploy these WSP file below in Central Administration:

rcr.sp.framework.wsp	Deployed	Globally deployed.
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For more details, read: <http://webservices.rcrtom.com.au/corporate-it/spprojects/Solutions%20Documentation/SharePointFrameWork.docx>

### Installing PDF Converter

Run a PowerShell script that will deploy either Windows Solution Package (WSP) file called

- **rcr.wordpdfconverter.wsp** or
- **rcr.wf.pdfconverter.wsp**

A successful installation on the SharePoint farm will deploy these WSP file below in Central Administration:

Name	Status	Deployed To
adciscoadministration.wsp	Deployed	Globally deployed.
ilovesharepoint.workflow.activities.wsp	Deployed	Globally deployed.
rcr.wf.pdfconverter.wsp	Deployed	Globally deployed.
rcr.wordpdfconverter.wsp	Deployed	Globally deployed.

## 2.1 Feature Activation

After installing the solution package in section 2.0, activate either one of the PDF conversion feature from RCR site.

### Custom Menu PDF Converter

If custom menu PDF converter was installed, then:

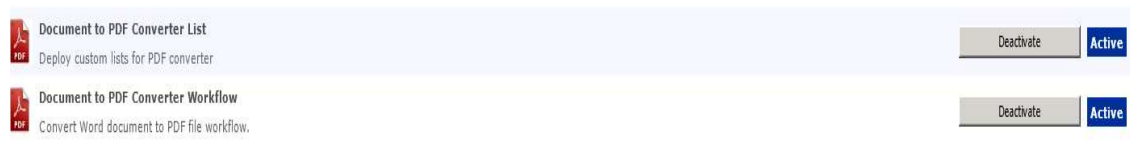
1. Go to the RCR site where the Word to PDF converter feature will be activated.
2. Go to Site Actions->Site Settings->Manage site features
3. Activate **Document to PDF Converter** feature



### Sequential Workflow PDF Converter

If sequential workflow PDF converter was installed, then:

1. Go to the RCR site where the Word to PDF converter feature will be activated.
2. Go to Site Actions->Site Settings->Site Collection Features
3. Activate two features:
  - **Document to PDF Converter List** – Deploy two custom SharePoint lists i.e. *PDF Settings* and *PDF Notification Log* (more details explained in section 3.2)
  - **Document to PDF Converter Workflow** – Deploy the workflow



## 2.2 Word Automation Service

In order for the PDF conversion feature to run, ensure that **Word Automation Services Timer Job** is running. In Central Administration

1. Go to: Monitoring->Job Definitions->Scheduled Jobs
2. Double click "Word Automation Services Timer Job"
3. Review the recurring schedule and update the schedule as needed to run in 15 minutes (out of the box default settings) or less

Job Title	Word Automation Services Timer Job	
Job Description		
Job Properties	Web application: N/A Last run time: 5/12/2014 11:45 AM	
Recurring Schedule	This timer job is scheduled to run: <input checked="" type="radio"/> Minutes Every 15 minute(s) <input type="radio"/> Hourly <input type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly	
Run Now   Disable   OK   Cancel		

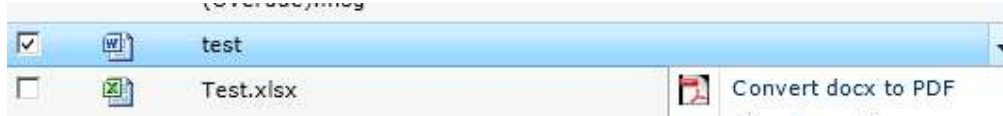
4. Click "OK" button to update the changes.

### 3. How to Use the PDF Converter

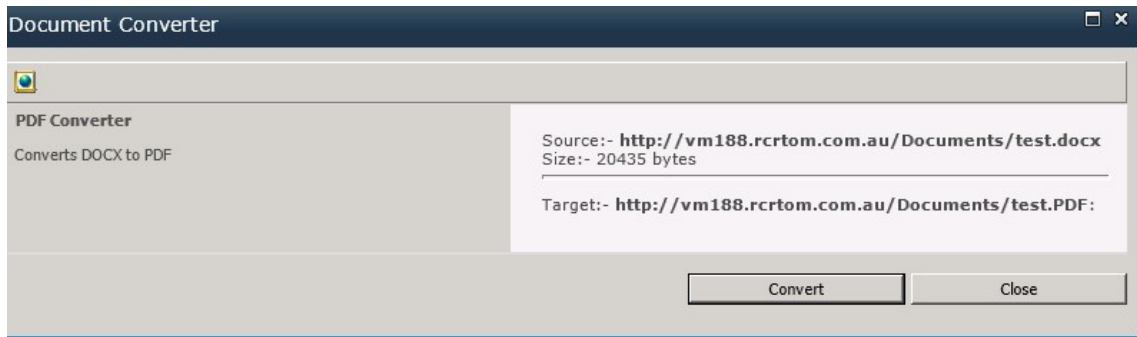
#### 3.1 Custom Menu PDF Converter

If custom Menu PDF converter was installed, follow the instruction below on how to use it:

1. Go to the document library on the RCR site and select a Word document that is needed for PDF conversion.
2. Click on the down arrow and select “Convert docx to PDF” from the custom action menu.



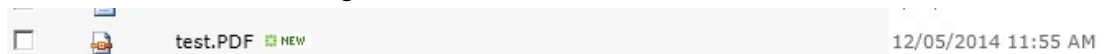
3. A new window dialog box will pop up. Click “Convert” button to confirm conversion



4. If PDF conversion was successful, a message will appear below:



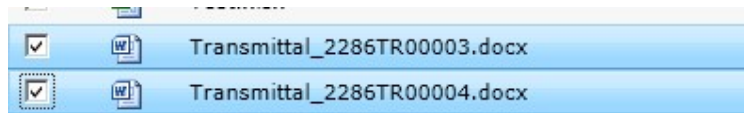
5. Click “Close” button to close the window dialog box
6. Wait for about 15 minutes or less, depending on how often the **Word Automation Services Timer Job** runs in section 2.2
7. The new PDF file will soon be generated.



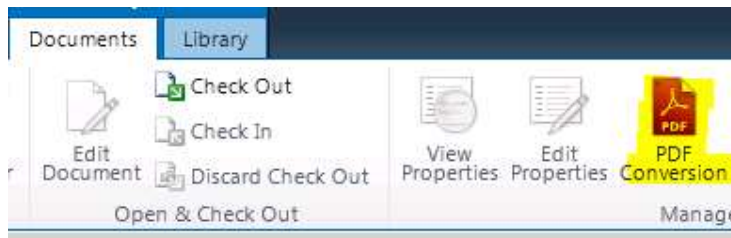
### Multiple PDF Conversions

There is also the ability to convert multiple Word documents to PDF instead of converting each individual document. To do this:

1. Tick the check-box on each document that needs to be converted



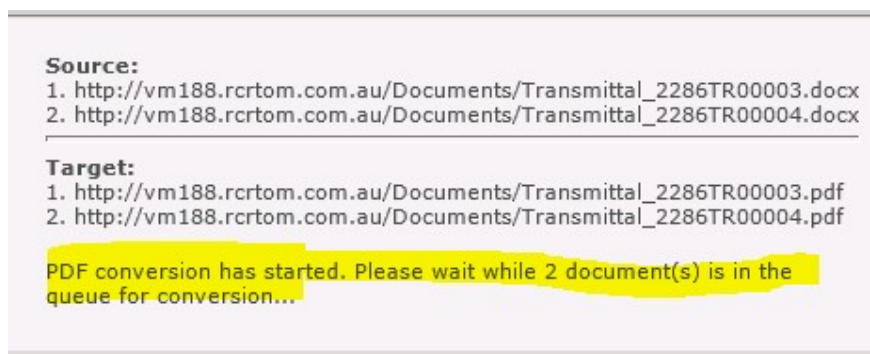
2. Click the **PDF Conversion** button on the ribbon bar



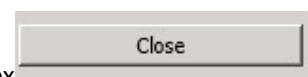
3. A window dialog box will pop up to confirm the list of multiple documents pending conversion. Click the **Convert** button to confirm the selected documents for PDF conversion



4. A message will be displayed that the selected multiple documents are now in progress of PDF conversion.



5. Click the **Close** button to close the window dialog box



6. The selected multiple documents will eventually be converted to its PDF file



**NOTE:**

Only word document in \*.docx format type will be converted into PDF file. If other invalid documents were attempted to be converted into a PDF file, a warning message will be displayed e.g.

Invalid Word document file type (\*.doc or \*.docx) for: Documents/Notifications E2248 Test E2248 Test - 04 Drawings and Photos (Overdue).msg

### 3.2 Workflow PDF Converter

Follow the instruction below on how to use it, if sequential workflow PDF converter was installed:

#### Setting up the workflow

1. Go the document library of the RCR site where PDF feature will be used
2. Go to Library tab on the ribbon bar and click on Workflow Settings icon->WorkflowSettings



3. Click "Add a workflow" link
4. Do the following:
  - a. Select PDFConversionWorkflow from the **workflow dropdown menu**.
  - b. Enter a description **name**
  - c. Tick the following checkbox:
    - i. "Allow this workflow to be manually started.."
    - ii. Start this workflow when a new item is created – optional depending on requirement
    - iii. Start this workflow when a new item is changed - optional depending on requirement
  - d. Click "OK" button when finish

<b>Content Type</b> Select the type of item that you want this workflow to run on. Content type workflows can only be associated to a list content type, not directly to the list.	Run on items of this type: All (Selecting a different type will navigate you to the Add a Workflow page for that content type.)
<b>Workflow</b> Select a workflow to add to this document library. If the workflow template you want does not appear, contact your administrator to get it added to your site collection or workspace.	Select a workflow template: Disposition Approval <b>PDFConversionWorkflow</b> test Collect Signatures - SharePoint 2 Description: PDF Conversion Workflow
<b>Name</b> Type a name for this workflow. The name will be used to identify this workflow to users of this document library.	Type a unique name for this workflow: PDF Conversion Wr
<b>Task List</b> Select a task list to use with this workflow. You can select an existing task list or request that a new task list be created.	Select a task list: Tasks Description: Task list for workflow.
<b>History List</b> Select a history list to use with this workflow. You can select an existing history list or request that a new history list be created.	Select a history list: Workflow History Description: A system library used to store workflow history information that is created in this site. It is created by the Publishing feature.
<b>Start Options</b> Specify how this workflow can be started.	<input checked="" type="checkbox"/> Allow this workflow to be manually started by an authenticated user with Edit Item permissions. <input type="checkbox"/> Require Manage Lists Permissions to start the workflow. <input type="checkbox"/> Start this workflow to approve publishing a major version of an item. <input type="checkbox"/> Start this workflow when a new item is created. <input type="checkbox"/> Start this workflow when an item is changed.
<div style="text-align: right;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </div>	

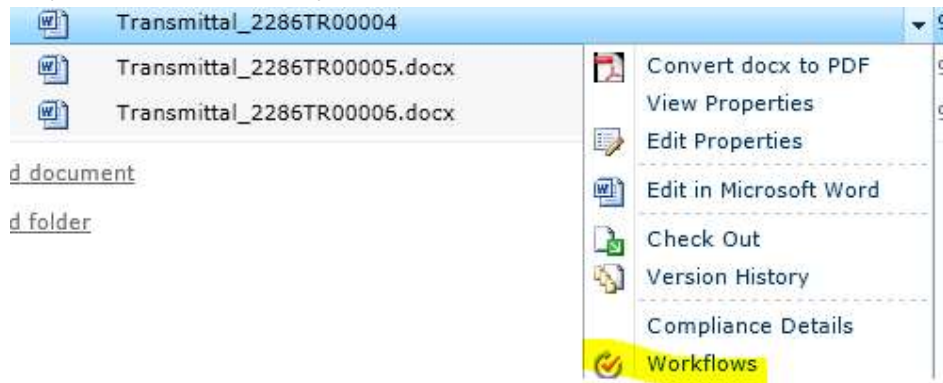


- Review the **PDF Settings** custom list and update the default *setting values* if required. These settings are used by the workflow to log results on the status of PDF conversion workflow and send email.

<input type="checkbox"/>	Title	Settings Value	Settings Category
<input type="checkbox"/>	devmode <small>NEW</small>	true	devmode
<input type="checkbox"/>	EmailTo <small>NEW</small>	david.liong@rcrtom.com.au	EmailTo
<input type="checkbox"/>	EmailFrom <small>NEW</small>	no-reply-devsharepoint@rcrtom.com.au	EmailFrom
<input type="checkbox"/>	UseProxy <small>NEW</small>	false	UseProxy
<input type="checkbox"/>	UseTargetLibrary <small>NEW</small>	false	UseTargetLibrary
<input type="checkbox"/>	UseProxyEmail <small>NEW</small>	false	UseProxyEmail
<input type="checkbox"/>	Domain <small>NEW</small>	RCRTom	Domain
<input type="checkbox"/>	SPLogList <small>NEW</small>	PDF Notification Log	SPLogList
<input type="checkbox"/>	SMTP Server <small>NEW</small>	mail.rcrtom.com.au	SMTPServer

### Starting the Workflow

- To manually start PDF conversion workflow, select the document. Then go to custom menu drop down and select *Workflows*



- Click on PDF Conversion Workflow button to start it.



- 3. Wait for the workflow to finish. The workflow will:
  - a. Send an email to the user who generated the PDF; and

☐no-reply-devsharepoint@rcrtom.com.au

PDF Conversion Notification

To: David Liong

Action Items Get more

Dear David Liong,

The document [http://vm188.rcrtom.com.au/Documents/Transmittal\\_2286TR00003.docx](http://vm188.rcrtom.com.au/Documents/Transmittal_2286TR00003.docx) is in the process for PDF conversion. Please wait for the PDF file link below to be made available.

PDF file: [http://vm188.rcrtom.com.au/Documents/Transmittal\\_2286TR00003.pdf](http://vm188.rcrtom.com.au/Documents/Transmittal_2286TR00003.pdf)

- b. Logged all workflow activities onto the custom **PDF Notification Log List**

ID	Document ID	Title	Document FileName	PDF FileName	Description Log	Convert Date	Convert Status	Modified By	Modified
1	8	Starting PDF Conversion Workflow @HV	<a href="http://vm188.rcrtom.com.au/Documents/test.docx">http://vm188.rcrtom.com.au/Documents/test.docx</a>		New workflow instance has started...	13/05/2014	Success	System Account	13/05/2014 3:25 PM
2	8	PDF conversion Status @HV	<a href="http://vm188.rcrtom.com.au/Documents/test.docx">http://vm188.rcrtom.com.au/Documents/test.docx</a>	<a href="http://vm188.rcrtom.com.au/Documents/test.pdf">http://vm188.rcrtom.com.au/Documents/test.pdf</a>	PDF conversion has started. Please wait while the document is in the queue for conversion...	13/05/2014	Success	System Account	13/05/2014 3:25 PM