

DocGen Lite

1. Create site columns
2. Add site columns to list with data entry form
3. Add site columns to output doc lib
4. Create template from output doc lib and add Quick Parts -> Doc Props
5. Save template to template doc lib (different than output doc lib)
6. Create flow

The screenshot displays a Microsoft Flow configuration with four steps connected by downward arrows:

- Step 1: For a selected item** (Trigger)
- Step 2: Get item** (Action)
 - * Site Address: Office of the Director - <https://cdc.sharepoint.com/sites/CPR-DSLR/OD>
 - * List Name: InputList
 - * Id: ID
- Step 3: Copy file** (Action)
 - * Current Site Address: Office of the Director - <https://cdc.sharepoint.com/sites/CPR-DSLR/OD>
 - * File to Copy: /Shared Documents/newTemplate.docx
 - * Destination Site Address: Office of the Director - <https://cdc.sharepoint.com/sites/CPR-DSLR/OD>
 - * Destination Folder: /OutputLib
 - * If another file is already there: Copy with a new name
- Step 4: Update item** (Action)
 - * Site Address: Office of the Director - <https://cdc.sharepoint.com/sites/CPR-DSLR/OD>
 - * List Name: OutputLib
 - * Id: ItemId
 - Title: custom doc title
 - Announcement Type Value: Announcement...
 - Recipient_Person Claims: Recipient_Pers...
 - Recipient Name: Recipient_Pers...