



KWizCom Corporation

# Workflow Activity Toolkit

User Guide

## SharePoint Workflow Activity Toolkit User Guide

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## SharePoint Workflow Activity Toolkit User Guide

### CONTENTS

Contents .....	3
introduction .....	5
General .....	5
Product Overview .....	6
The business need .....	6
Key Features .....	7
Installation Guide .....	8
Software Requirements .....	8
Server Requirements .....	8
Client Requirements .....	8
Installation Procedure .....	8
SharePoint 2010 .....	8
post Installation .....	10
SharePoint 2010 .....	10
Un-Installation Procedure.....	10
SharePoint 2010 .....	10
Administration Guide .....	11
Product Activation .....	11
SharePoint 2010 .....	11
KWizCom Workflow Activities localization .....	15
Using the Workflow Activity Toolkit in SharePoint Designer.....	16
introduction .....	16
The activities included in the Workflow Activity Toolkit .....	16
Create Remote List Item Activity .....	17

## SharePoint Workflow Activity Toolkit User Guide

Update Remote List Item Activity .....	19
Delete Remote List Item Activity .....	21
Copy Remote List Item Activity.....	22
Get Remote Lookup Activity .....	24
Convert URL to PDF Activity .....	26
Convert List Item to PDF .....	28
Convert multiple List Items to PDF .....	30
Convert Infopath Form to PDF.....	32
Supported comparison operators .....	34
Supported Date Tokens .....	36
FAQ.....	37
Do i have to install anything on my COMPANY's Pcs? .....	37
I ran the workflow but nothing happened, what's wrong? .....	37

## INTRODUCTION

### GENERAL

This document provides all the information needed to install, evaluate and deploy this KWizCom product:

- Introduction
- Installation guide
- Administrator guide
- FAQ

## PRODUCT OVERVIEW

KWizCom SharePoint Workflow Activity Toolkit includes a set of custom workflow activities that bridge over gaps in the existing out-of-the-box SharePoint workflow activities.

The major challenge that is resolved by the Workflow Activity Toolkit is the List Actions Site Barrier; The out-of-the-box SharePoint Designer list activities let you manipulate list data (Add item, Update, Delete etc.) only in lists that are located on the same site where the workflow was triggered. This means that you cannot have a workflow that adds an item for example to a list that is located in a different site/site collection.

With KWizCom's Workflow Activity Toolkit the site barrier no longer exists; you can now easily implement no-code workflows with SharePoint Designer that are cross-site, adding/updating/deleting items in lists located anywhere you need in your SharePoint environment.

## THE BUSINESS NEED

ALL SharePoint deployments are multi-site deployments.

This reflects many times company structure, for example: site collection for each department, and a site for every team and for every project.

Every such company has its business processes that many times are cross-department, and therefore – cross-site.

Trying to automate these business processes by using SharePoint Workflow requires the ability to process data items located in remote lists – that exists on other sites.

### Example:

A company that sells products may have a **Sales site** where the Sales CRM processes are managed, and an **Inventory site** where the product inventory is managed.

When an order is made in the Sales CRM, a workflow is triggered. That workflow, among other actions, should update the inventory of the relevant products in the Inventory site.

SharePoint out-of-the-box workflows cannot update data which is located in other sites, but can only update local data on the same site.

With KWizCom's Workflow Activity Toolkit, that workflow which is triggered at the Sales site, is able to update the product inventory at the remote Inventory site.

## SharePoint Workflow Activity Toolkit User Guide

### KEY FEATURES

Feature	KWizCom Workflow Activity Toolkit	SharePoint 2007/2010/2013 out-of-the-box
Create Remote List Item workflow activity	✓	
Update Remote List Item/s workflow activity	✓	
Delete Remote List Item/s workflow activity	✓	
Copy to Remote List Item/s workflow activity	✓	
Move to Remote List Item/s workflow activity	✓	
Get remote lookup value workflow activity	✓	
Convert URL to PDF*	✓	
Convert list item to PDF*	✓	
Convert Multiple list items to PDF*	✓	
Convert InfoPath form to PDF*	✓	

**\*Note-** the convert to PDF custom workflow activities require an active KWizCom iMush-Print Feature license, and are included only in version 11.2.00 or later versions.

## INSTALLATION GUIDE

### SOFTWARE REQUIREMENTS

#### SERVER REQUIREMENTS

- SharePoint Server/Foundation 2010/2013

#### CLIENT REQUIREMENTS

- Windows 7/8 or Mac OS X V10.9
- Microsoft Internet Explorer 9+ / Mozilla Firefox (Latest version) / Google Chrome (Latest version), Safari (Latest version)

### INSTALLATION PROCEDURE

#### SHAREPOINT 2010/2013

1. Log in as SharePoint administrator account to your SharePoint front-end server.
2. Browse the product's page on KWizCom's website and click the "Go" link under the "Install using our Web Installer" section.  
This will start the KWizCom web installer.

**Note:** The KWizCom Web Installer will automatically offer you to upgrade other existing KWizCom products on your farm, in case you have old versions installed. You can check which products you wish to update at this time.

3. In case you prefer just to download the relevant .wsp packages and manually deploy them, then in the web installer UI check the "Download only" option (3rd page in the installer's wizard), OR download the product WSP packages by clicking their links under the "Download Installable Packages" section.  
After you manually download and unzip the product's WSP packages or use the web installer to download the product's packages, install the KWizCom product by simply running the "SP-WSPInstaller" powershell script.



## SharePoint Workflow Activity Toolkit User Guide

**IMPORTANT:**

To use the PDF-conversion workflow activities, you'll need also to install and activate KWizCom's Printing Feature add-on:

<http://www.kwizcom.com/sharepoint-add-ons/sharepoint-printing-feature/overview/>

This product requires separate purchase and licensing.

## POST INSTALLATION

### SHAREPOINT 2010/2013

1. In Central Admin, go to the Web Application Features page and activate the “KWizCom Workflow Activity Toolkit” feature. This will make the custom activities that are provided by the Workflow Activity Toolkit, available in that web application.

Name	Status
<b>KWizCom SharePoint Workflow Activity Toolkit</b> Activate this feature to make KWizCom's custom workflow actions available in SharePoint Designer when connecting to this web application	Deactivate <b>Active</b>
<b>Office Server Enterprise Search</b> Uses the Office Server Search 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 <b>Active</b>
<b>Office Server Site Search</b> Uses the Office Server Search Service for site and list scoped searches.	Deactivate <b>Active</b>
<b>Office SharePoint Server Standard Web application features</b> Features such as user profiles and search, included in the Office SharePoint Server Standard License	Deactivate <b>Active</b>

## UN-INSTALLATION PROCEDURE

### SHAREPOINT 2010/2013

1. Log in using SharePoint administrator account to your SharePoint front-end server.
2. Retract and then remove the solution using SharePoint Central Admin.

## ADMINISTRATION GUIDE

This section describes all administration activities related to the product, including: product localization, product configuration and customization.

## PRODUCT ACTIVATION

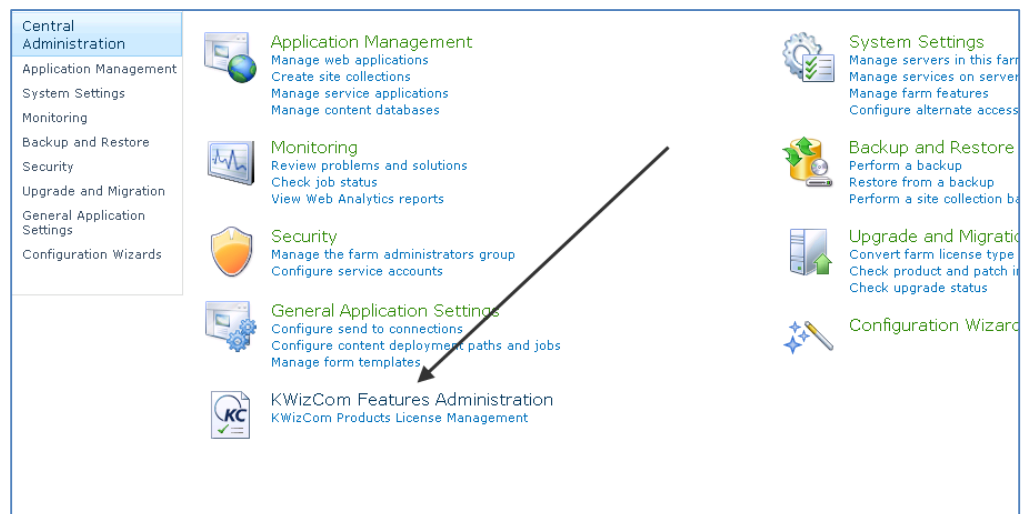
KWizCom products are available for evaluation prior to purchase.

This way you can try our components and verify that they indeed meet your needs. Each evaluation version contains all features of the component's production version. The only difference between the versions is that the evaluation version is time-limited and will operate for a period of one month.

Once you decide to purchase a KWizCom component you will need to **order** and then to **activate** the product. The steps that need to be taken next are listed below.

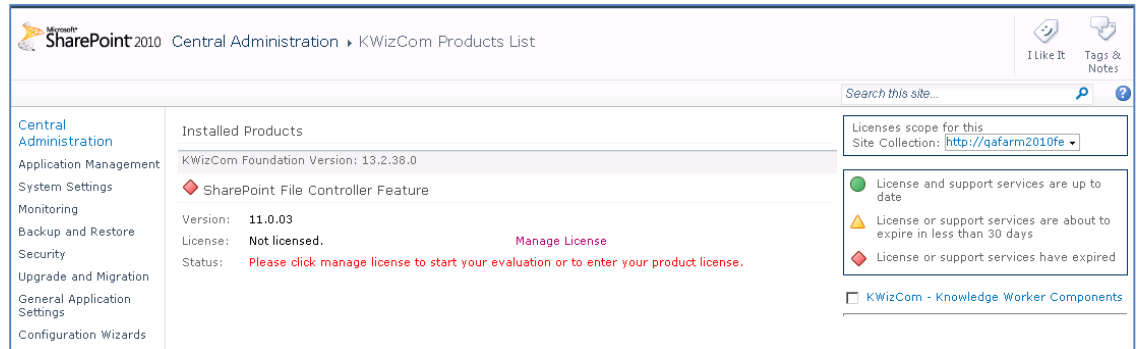
### SHAREPOINT 2010/2013

1. Order the product on the KWizCom website – [www.KWizCom.com](http://www.KWizCom.com), or contact our sales team at [sales@kwizcom.com](mailto:sales@kwizcom.com).
2. After the order was made, you can activate your installed evaluation version. Activation is done by the following steps:
  - a. Open SharePoint Central Admin. On the main “Central Administration” page, you will see the “KWizCom Features Administration” icon:



## SharePoint Workflow Activity Toolkit User Guide

- b. Click the KWizCom Features Administration icon. You will be redirected to a page that allows you to manage all your installed KWizCom products' licenses:



- c. Click the "Manage License" link next to the product that you wish to activate. You will be redirected to that product's license management page:

Product Information	
Name:	SharePoint File Controller Feature
Version:	11.0.03
Farm License	
Farm license applies to all site collections in your farm.	
Product Code:	Not requested <a href="#">Request product code and start your evaluation license now!</a>
Web application or site collection license management	
If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license on from the picker and enter the I	
Site Collection:	<a href="http://qafarm2010fe">http://qafarm2010fe</a>
Use the form below to activate <b>SharePoint File Controller Feature</b> on one the selected site collection or web application only.	
Web Application License	
Web application license applies to all site collections under the same URL, for example: <a href="http://sharepoint">http://sharepoint</a> , <a href="http://sharepoint/sites/sales">http://sharepoint/sites/sales</a> etc...	
Product Code:	Not requested <a href="#">Request product code and start your evaluation license now!</a>
Site Collection License	
Site collection license applies only to one specific site and it's sub sites.	
Product Code:	Not requested <a href="#">Request product code and start your evaluation license now!</a>

- d. Click on the "Request product code and start your evaluation now" link, under the required license type (Farm, Web application, Site Collection).  
A product code will be generated and displayed as in the following screenshot:

## SharePoint Workflow Activity Toolkit User Guide

**Product Information**

Name: SharePoint File Controller Feature  
Version: 11.0.03

**Farm License**

Farm license applies to all site collections in your farm.

Product Code: TNWV07J8[07QZMJUVEVHJ8MMEVH7QMM57885VVV5JVM-.5VQMUM.MM]MVNXJX [Copy to clipboard](#)

Activation Code:  [Activate now!](#)

License Notifications:  [Update](#)

License type: Evaluation  
Expiration: Thursday, November 18, 2010

**Web application or site collection license management**

If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license from from

Site Collection: <http://qafarm2010fe>

Use the form below to activate **SharePoint File Controller Feature** on one the selected site collection or web application only.

**Web Application License**

Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...

Product Code: Not requested [Request product code and start your evaluation license now!](#)

**Site Collection License**

- e. Copy the product code.
- f. Browse the *Product Activation Request* page on KWizCom's web site: <http://www.kwizcom.com/ProductReg>.

**Product Activation Request**

In order to deactivate a product please click [here](#).

This Product Activation Form is used to get your product activation key after you have purchased the product.

Please fill out the following form. Once we get your product activation request, a product activation key will be sent to you by email, along with the activation process description.

\*Customer Name:

\*E-mail address:

\*Share-It Order/Invoice Number:

\*Product Code:

\*License Type:

Copy your *Product Code* into the "Product Code" field, and after you fill-out all other form fields, click "Send Activation Request" button.

## SharePoint Workflow Activity Toolkit User Guide

- g. Once your order is confirmed, you will receive the Activation Code for your product by email.
- h. Copy the activation code into the “Activation Code” field in the product’s license management page and click “Activate now!” link.

Product Information	
Name:	SharePoint File Controller Feature
Version:	11.0.03
Farm License	
Farm license applies to all site collections in your farm.	
Product Code:	TNWW07J8[07QZMJUVEVHJ8MMEVH7QJMM57885VVVV5JVM-.5VQMUM.MM]MVNXJX <a href="#">Copy to clipboard</a>
Activation Code:	<input type="text"/> <a href="#">Activate now!</a>
License Notifications:	<input type="text"/> <a href="#">Update</a>
Optionally, enter your email address to get notified when your license is exceeded or about to expire. To enter more than one	
License type:	Evaluation
Expiration:	Thursday, November 18, 2010
Web application or site collection license management	
If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license	
Site Collection:	<a href="http://qafarm2010fe">http://qafarm2010fe</a> ▼
Use the form below to activate <b>SharePoint File Controller Feature</b> on one the selected site collection or web application only.	
Web Application License	
Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...	
Product Code:	<b>Not requested</b> <a href="#">Request product code and start your evaluation license now!</a>
Site Collection License	
Site collection license applies only to one specific site and it's sub sites.	

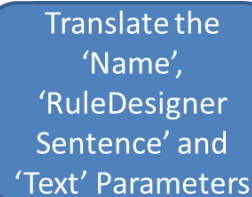
**That's it! Your product is now fully activated**

## KWIZCOM WORKFLOW ACTIVITIES LOCALIZATION

To localize KWizCom workflow activities to your preferred language:

1. Go to the following location:  
C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\TEMPLATE\1033\Workflow
2. Copy the file 'kwizcom.sharepoint.workflow.activitytoolkit.ACTIONS' to the language folder of your choice (for example 1036 for French)
3. Open the file in any editor and translate the following parameters:

```
<Action
  Name="Create Remote List Item"
  ClassName="KWizCom.SharePoint.Workflow.ActivityToolkit.Activities.CreateRemoteListItemActivity"
  Assembly="KWizCom.SharePoint.Workflow.ActivityToolkit, Version=1.0.0.0, Culture=neutral,
  PublicKeyToken=30fb4ddbec95ff8f"
  AppliesTo="all"
  Category="KWizCom Custom Actions">
  <RuleDesigner Sentence="Create Item in list %1 with the following %2. Store
  new item id in %3">
  <FieldBind Field="TargetListUrl" Text="target list" Id="1"
  DesignerType="StringBuilder" />
  <FieldBind Field="FieldValues" Text="field values" Id="2"
  DesignerType="StringBuilder" />
  <FieldBind Field="NewItemId" Text="variable" Id="3"
  DesignerType="ParameterNames" />
  </RuleDesigner>
```



Translate the  
'Name',  
'RuleDesigner  
Sentence' and  
'Text' Parameters

4. Run iisrest and the localized custom actions are ready for use!

### Note

After completing the localization a restart of SharePoint Designer is required.

USING THE WORKFLOW ACTIVITY TOOLKIT IN SHAREPOINT DESIGNER

INTRODUCTION

After you’ve installed the Workflow Activity Toolkit and activated the Web Application feature, you can now start using its included workflow activities in SharePoint Designer.

This section describes the available activities along with usage examples for each one.

THE ACTIVITIES INCLUDED IN THE WORKFLOW ACTIVITY TOOLKIT

The toolkit includes the following workflow activities:

Activity name	What it does
Create Remote List Item	Creates a new item in a remote list based on static data, lookup data from local lists or workflow variables. Once the new item is created, the action stores its id in a workflow variable.
Update Remote List Item	Updates remote list item/s. The item is defined by a property-based condition.
Delete Remote List Item	Delete remote list item/s. The item is defined by a property-based condition.
Copy to Remote List Item	Copy item/s from one remote list to another remote list.
Get remote lookup value	Gets a value from a remote list’s item into a workflow variable. This enables referencing a remote list item fields as a lookup value for the Create/Update/Delete/Copy activities.
Convert URL to PDF*	Convert source SharePoint page to a PDF document and save it in a target location.
Convert List Item to PDF*	Convert a source list/document item to a PDF document and save it in a target location.
Convert Multiple List Items to PDF*	Convert multiples source list item/documents to a single, merged PDF document and save it in a target location.
Convert InfoPath Form to PDF*	Convert an InfoPath web form to a PDF document and save it in a target location.

\* This workflow activity requires an active license of KWizCom’s Printing Feature add-on: <http://www.kwizcom.com/sharepoint-add-ons/sharepoint-printing-feature/overview/>

The following sections provide details about each of the workflow activities listed above.

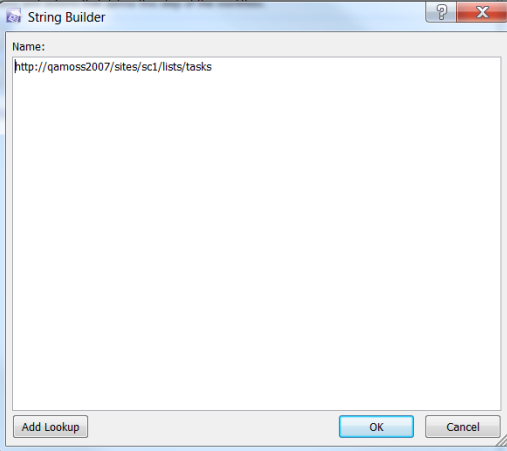
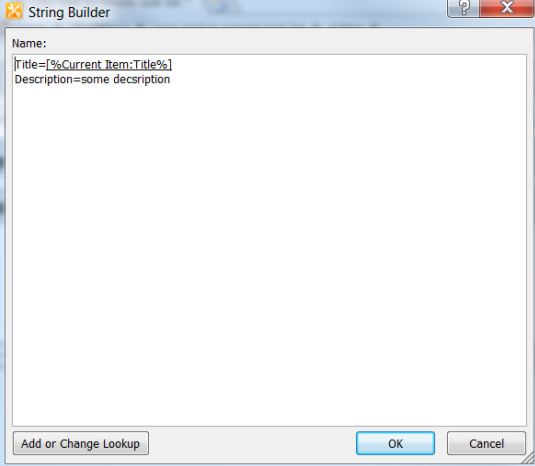


CREATE REMOTE LIST ITEM ACTIVITY

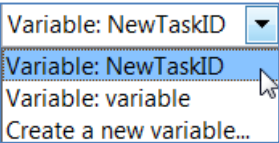
When adding the activity in SharePoint Designer, the following UI appears:

Create Item in list target list with the following field values. Store new item id in Variable:variable

**Parameters**

Parameter	Description
target list	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a single valid url of the list where you want to create the item.</p>
field values	<p>Clicking this link opens the standard String Builder:</p>  <p>Type the values that you want the workflow to set for each field of the created item in <code>[field name]=[field value]</code> format, one in each line.</p> <p><b>Example:</b></p>

SharePoint Workflow Activity Toolkit User Guide

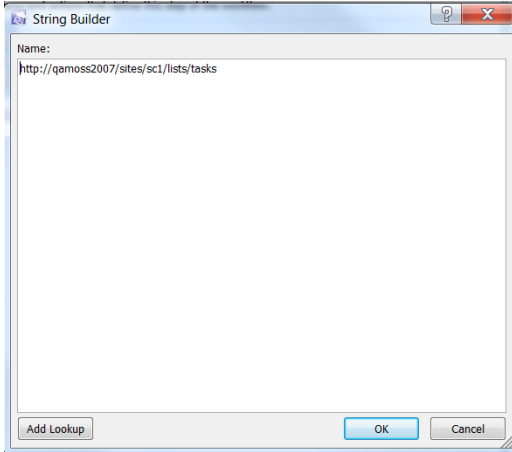
	<p>Title=some text for the title Description=some text for the description</p> <p><b>Remark:</b> You can use the field's displayed name or internal name.</p>
Variable:variable	<p>Clicking this link opens inline a drop-down control that enables the user to select one of the existing workflow variables or create a new variable:</p>  <p>Use this workflow variable to store the ID of the new created list item.</p>

UPDATE REMOTE LIST ITEM ACTIVITY

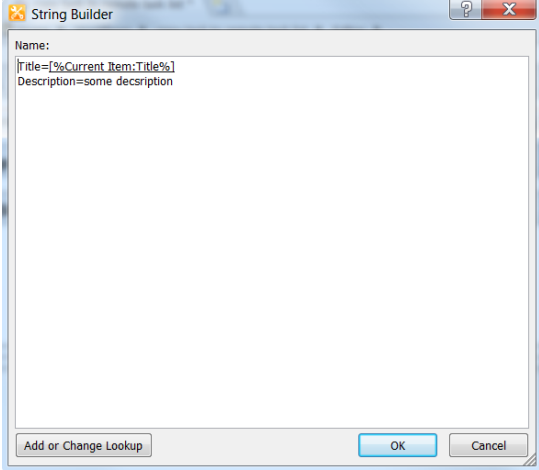
When adding the activity in SharePoint Designer, the following UI appears:

Update [target list](#) where [condition](#) with the following [field values](#)

**Parameters**

Parameter	Description
target list	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a single valid url of the list where you want to update the item/s.</p>
condition	<p>Clicking this link opens the standard String Builder.</p> <p>Type a single-line, property-based condition using the following format:  <code>[remote list's field name][operator][value]</code></p> <p><u>Where:</u>  <b>[remote list's field name]</b> is a name of a field in the remote list  <b>[operator]</b> is a comparison symbol such as ==, &gt;, &lt;          See <a href="#">full list of supported comparison operators</a>.  <b>[value]</b> can be a static or a dynamic value using the OOTB local lookup values (workflow variables, local list fields).</p> <p><b>Example:</b>          The following condition finds all announcements that expired prior to Nov-05-2011:  <code>Expires &lt;= 11/05/2011</code></p> <p><b>Remark:</b>          You can use the field's displayed name or internal name.</p>
field values	Clicking this link opens the standard String Builder:

## SharePoint Workflow Activity Toolkit User Guide

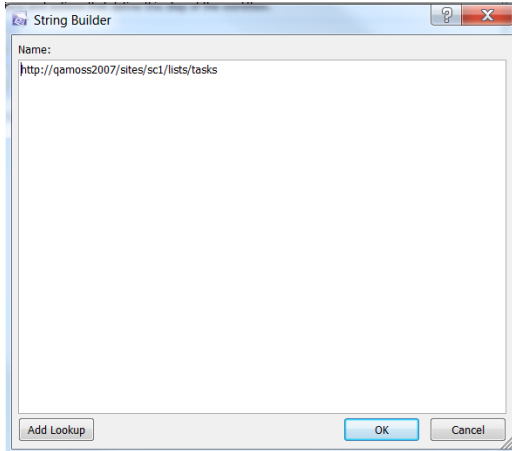
	 <p>Type the values that you want the workflow to set for each field of the updated item/s in <code>[field name]=[field value]</code> format, one in each line.</p> <p><b>Example:</b></p> <pre>Title=some text for the title Description=some text for the description</pre> <p><b>Remark:</b></p> <p>You can use the field's displayed name or internal name.</p>
--	--

DELETE REMOTE LIST ITEM ACTIVITY

When adding the activity in SharePoint Designer, the following UI appears:

Delete [target list](#) where [condition](#)

**Parameters**

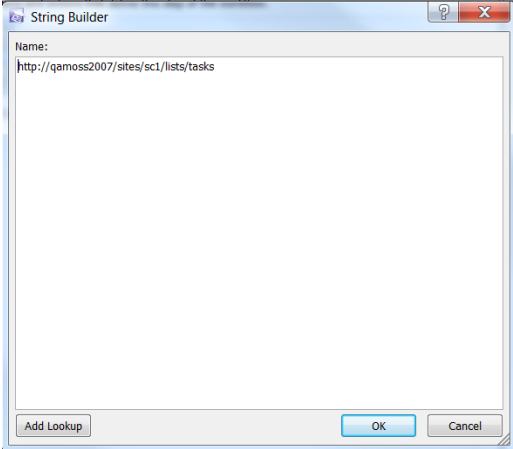
Parameter	Description
target list	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a single valid url of the list where you want to delete the item/s.</p>
condition	<p>Clicking this link opens the standard String Builder.</p> <p>Type a single-line, property-based condition using the following format:  <code>[remote list's field name][operator][value]</code></p> <p><u>Where:</u>  <b>[remote list's field name]</b> is a name of a field in the remote list  <b>[operator]</b> is a comparison symbol such as ==, &gt;, &lt;          See <a href="#">full list of supported comparison operators</a>.  <b>[value]</b> can be a static or a dynamic value using the OOTB local lookup values (workflow variables, local list fields).</p> <p><b>Example:</b>          The following condition finds all announcements that expired prior to Nov-05-2011:  <code>Expires &lt;= 11/05/2011</code></p> <p><b>Remark:</b>          You can use the field's displayed name or internal name.</p>

**COPY REMOTE LIST ITEM ACTIVITY**

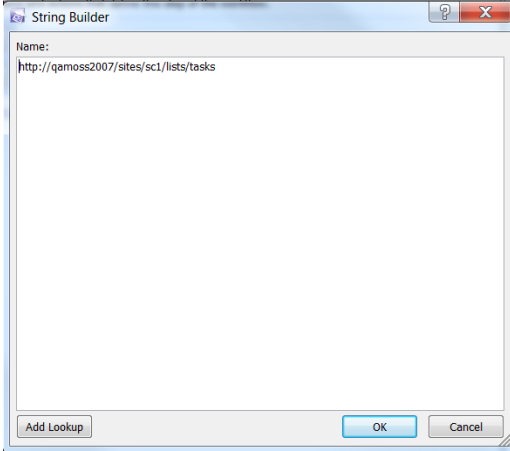
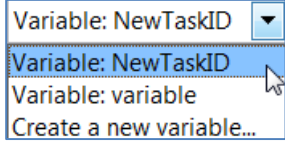
When adding the activity in SharePoint Designer, the following UI appears:

Copy item with attachments from source list where condition to target list.  
Get new item's id in Variable:variable

**Parameters**

Parameter	Description
Copy	Clicking this link opens an inline drop-down with 2 choices: <ul style="list-style-type: none"> <li>• Copy – copy list item/s</li> <li>• Move – Move list item/s</li> </ul>
With attachments	Clicking this link opens an inline drop-down with 2 choices: <ul style="list-style-type: none"> <li>• With attachments – copy list item/s with their file attachments</li> <li>• Without attachments – copy list item/s without their file attachments</li> </ul>
source list	Clicking this link opens the standard String Builder:  <p>Type a single valid url of the source list (from which you want to copy items).</p>
condition	Define property-based condition for the items that will be copied. <p>Clicking this link opens the standard String Builder.</p> <p>Type a single-line, property-based condition using the following format:  <code>[source list's field name][operator][value]</code></p> <p><u>Where:</u>  <b>[source list's field name]</b> is a name of a field in the source list  <b>[operator]</b> is a comparison symbol such as ==, &gt;, &lt;            See <a href="#">full list of supported comparison operators</a>.  <b>[value]</b> can be a static or a dynamic value using the OOTB local lookup values (workflow variables, local list fields).</p>

SharePoint Workflow Activity Toolkit User Guide

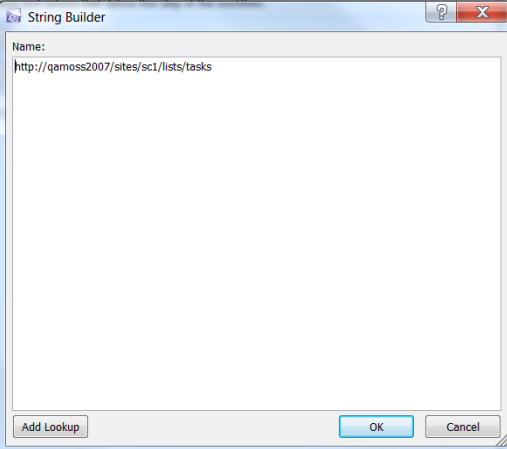
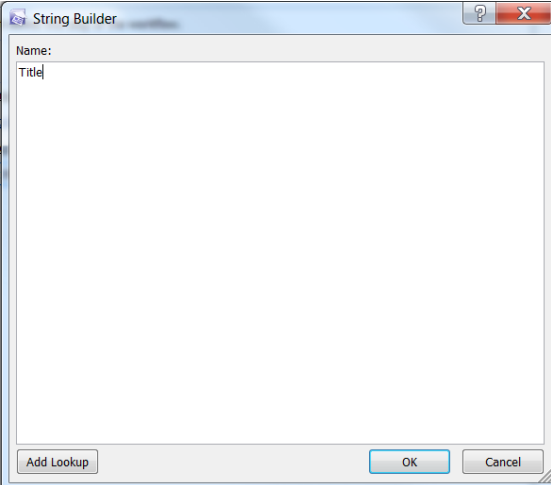
	<p><b>Example:</b> The following condition finds all tasks that are assigned to a specific user: <code>Assigned To==kwizcom\shai</code></p> <p><b>Remark:</b> You can use the field's displayed name or internal name.</p>
target list	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a single valid url of the target list where you want to copy the items to.</p>
Variable:variable	<p>Clicking this link opens inline a drop-down control that enables the user to select one of the existing workflow variables or create a new variable:</p>  <p>Use this workflow variable to store the ID of the copied list item.</p>

GET REMOTE LOOKUP ACTIVITY

When adding the activity in SharePoint Designer, the following UI appears:

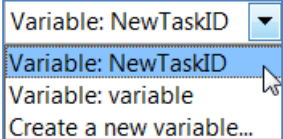
Get from source list the field's value where condition, into Variable:variable

**Parameters**

Parameter	Description
source list	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a single valid url of the source list.</p>
field's value	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a single valid field name.</p> <p><b>Remark:</b></p>



SharePoint Workflow Activity Toolkit User Guide

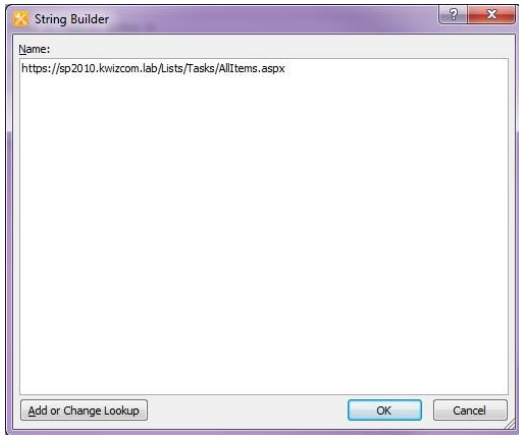
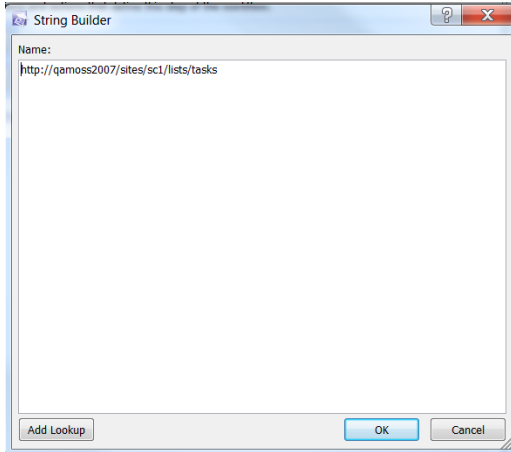
	<p>You can use the field's displayed name or internal name.</p>
condition	<p>Define property-based condition that is used to look for a specific item in the remote list.</p> <p>Clicking this link opens the standard String Builder.</p> <p>Type a single-line, property-based condition using the following format:  <code>[remote list's field name][operator][value]</code></p> <p><u>Where:</u>  <b>[remote list's field name]</b> is a name of a field in the remote list  <b>[operator]</b> is a comparison symbol such as ==, &gt;, &lt;          See <a href="#">full list of supported comparison operators</a>.  <b>[value]</b> can be a static or a dynamic value using the OOTB local lookup values (workflow variables, local list fields).</p> <p><b>Example:</b>          The following condition finds a task that its ID equals 7.  <code>ID==7</code></p> <p><b>Remark:</b>          You can use the field's displayed name or internal name.</p>
Variable:variable	<p>Clicking this link opens inline a drop-down control that enables the user to select one of the existing workflow variables or create a new variable:</p>  <p>Use this workflow variable to store the defined field's value of the item defined by the condition.</p>

**CONVERT URL TO PDF ACTIVITY**

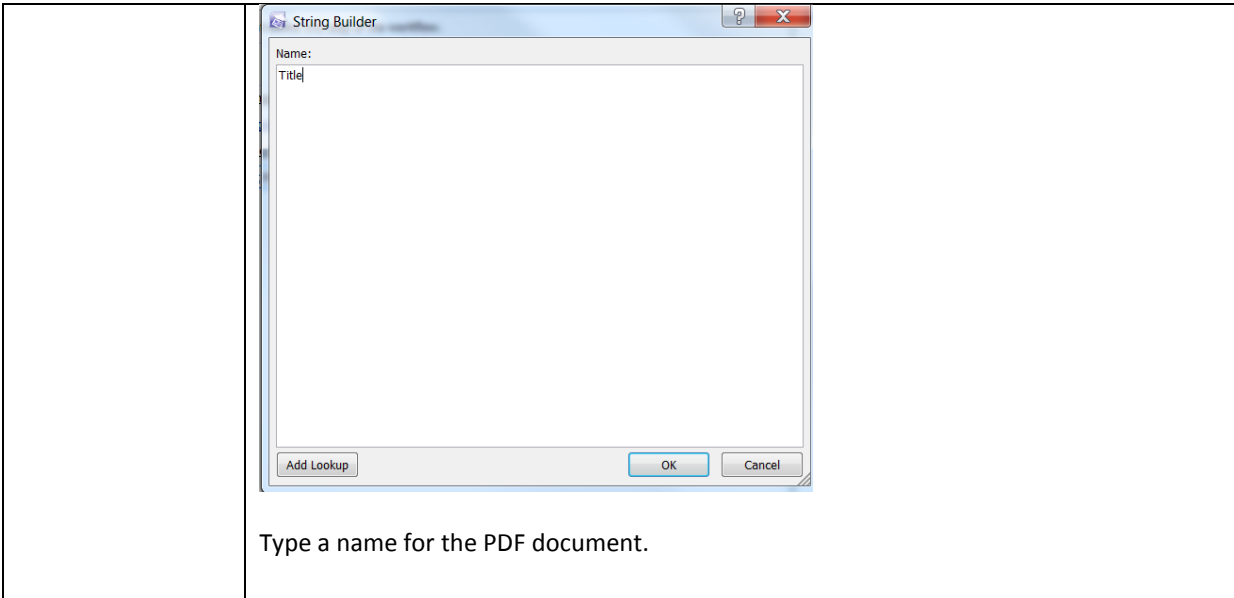
When adding the activity in SharePoint Designer, the following UI appears:

Convert [URL](#) to PDF, Save in [Library/Folder URL](#), target file [original name/title.pdf](#)

**Parameters**

Parameter	Description
URL	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a single valid url of a SharePoint page that you wish to convert to a PDF document.</p>
Library/Folder URL	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a single URL to the Library/Folder that the PDF document should be saved in.</p>
Original name/title	<p>Clicking this link opens the standard String Builder:</p>

## SharePoint Workflow Activity Toolkit User Guide



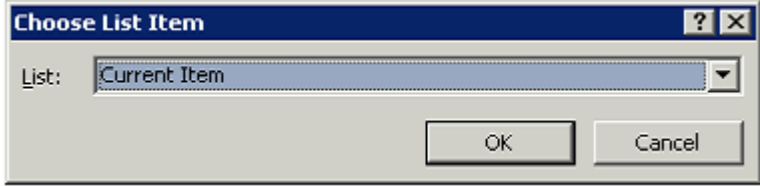
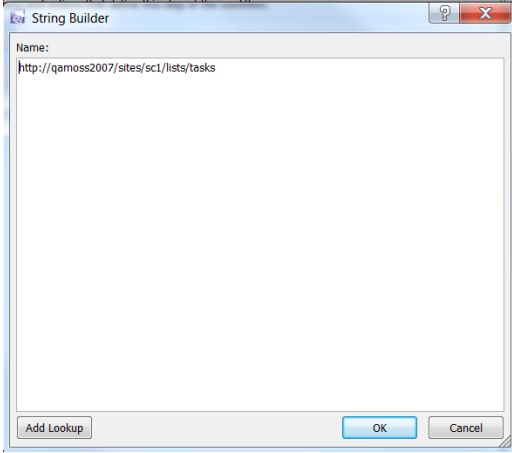
CONVERT LIST ITEM TO PDF

When adding the activity in SharePoint Designer, the following UI appears:

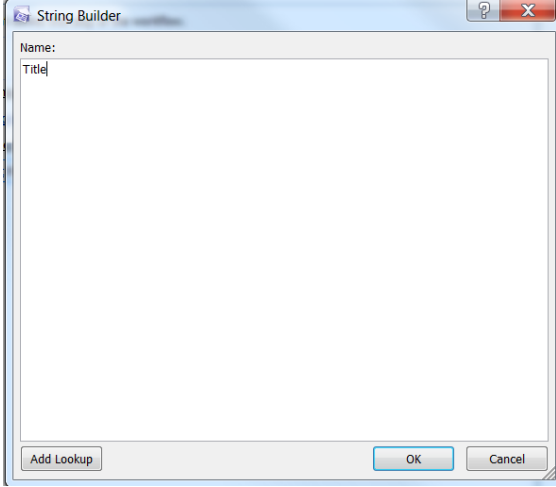
Convert an item in [this list](#), Save in [Library/Folder URL](#), target file [original name/title.pdf](#), Convert [Properties](#), Print using [Default Settings](#)

**Note-** This activity currently doesn't support SharePoint list forms customized with InfoPath.

**Parameters**

Parameter	Description
This list	<p>Clicking this link opens the following standard workflow list selection:</p>  <p>Click Ok to run this activity on the current item, or select a different local list and define the field and field value to identify the item by.</p>
Library/Folder URL	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a single URL to the Library/Folder that the PDF document should be saved in.</p>
Original name/title	<p>Clicking this link opens the standard String Builder:</p>

SharePoint Workflow Activity Toolkit User Guide

	 <p>Type a name for the PDF document.</p>
<p>Properties</p>	<p>Clicking this link opens an inline drop-down with 3 choices:</p> <ul style="list-style-type: none"> <li>• Properties- Choose to convert only item properties</li> <li>• File/attachment- Choose to convert only the attachment (for lists) or files (for libraries)</li> <li>• Both- Choose to convert both items properties and attachments</li> </ul>
<p>Default Settings</p>	<p>Clicking this link opens an inline drop-down with 3 choices:</p> <ul style="list-style-type: none"> <li>• Default settings- the conversion resolution settings will be taken from iMUSH</li> <li>• High resolution settings- the workflow activity will use high resolution (requires more memory)</li> <li>• Standard settings- the workflow activity will use standard resolution</li> </ul>

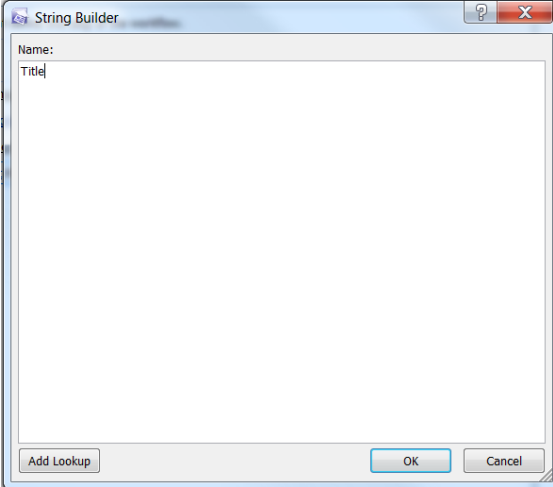
**CONVERT MULTIPLE LIST ITEMS TO PDF**

When adding the activity in SharePoint Designer, the following UI appears:

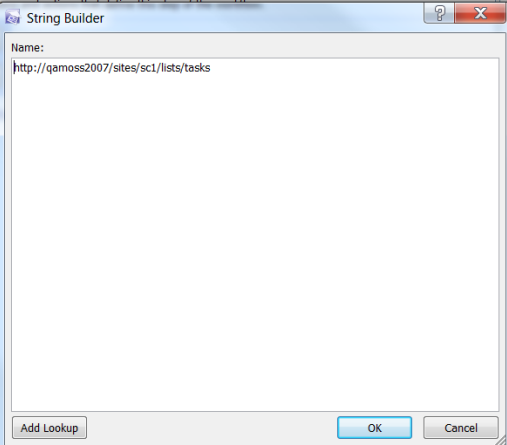
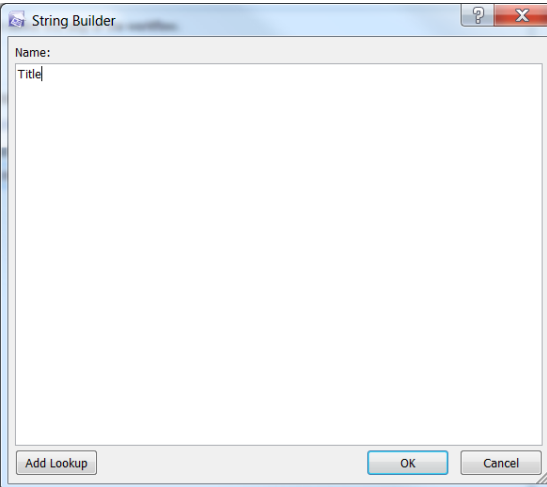
Convert multiple items in [this list](#), all items in [default view](#), Save in [Library/Folder URL](#), target file [original name/title.pdf](#), Convert [Properties](#), Print using [Default Settings](#)

**Note-** This activity currently doesn't support SharePoint list forms customized with InfoPath.

**Parameters**

Parameter	Description
This list	Clicking this link opens an inline drop-down of all the lists available under the current site.
Default view	Clicking this link opens the standard String Builder:  Type a list view that contains the items you wish to convert to PDF.
Library/Folder URL	Clicking this link opens the standard String Builder:

SharePoint Workflow Activity Toolkit User Guide

	 <p>Type a single URL to the Library/Folder that the PDF document should be saved in.</p>
Original name/title	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a name for the PDF document.</p>
Properties	<p>Clicking this link opens an inline drop-down with 3 choices:</p> <ul style="list-style-type: none"> <li>• Properties- Choose to convert only item properties</li> <li>• File/attachment- Choose to convert only the attachment (for lists) or files (for libraries)</li> <li>• Both- Choose to convert both items properties and attachments</li> </ul>
Default Settings	<p>Clicking this link opens an inline drop-down with 3 choices:</p> <ul style="list-style-type: none"> <li>• Default settings- the conversion resolution settings will be taken from iMUSH</li> <li>• High resolution settings- the workflow activity will use high resolution (requires more memory)</li> <li>• Standard settings- the workflow activity will use standard resolution</li> </ul>

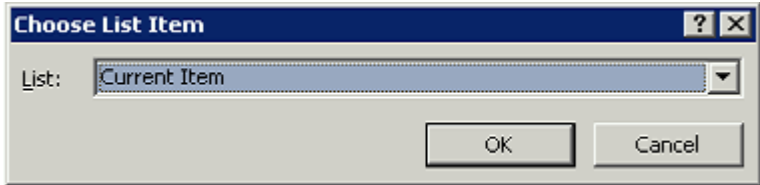
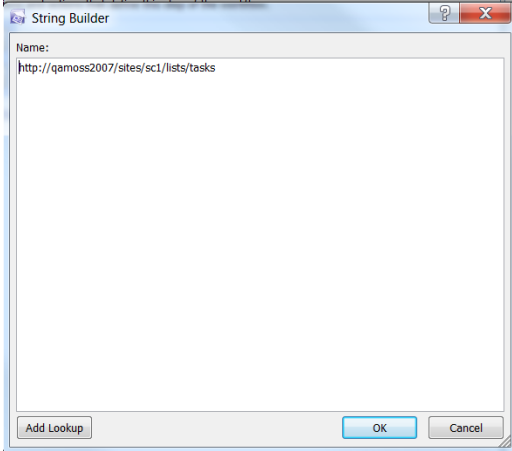
CONVERT INFOPATH FORM TO PDF

When adding the activity in SharePoint Designer, the following UI appears:

Convert InfoPath form in [this list](#), Save in [Library/Folder URL](#), target file [original name/title.pdf](#), Convert [Properties](#), Print using [Default Settings](#), Use [default view](#)

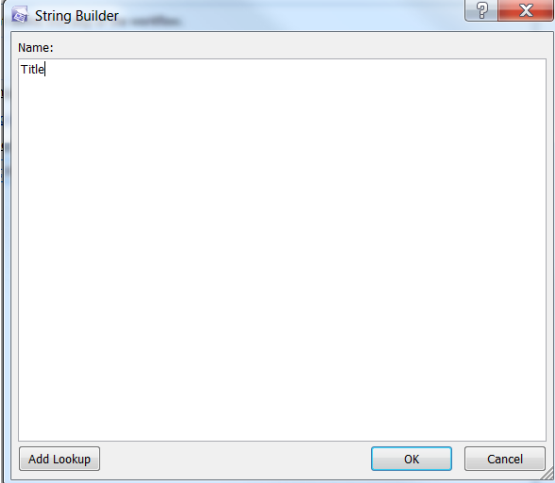
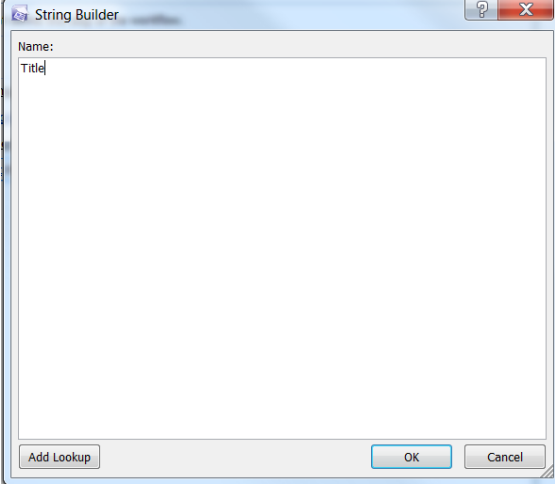
**Note-** This activity currently doesn't support SharePoint list forms customized with InfoPath.

**Parameters**

Parameter	Description
This list	<p>Clicking this link opens the following standard workflow list selection:</p>  <p>Click Ok to run this activity on the current item, or select a different local list and define the field and field value to identify the item by.</p>
Library/Folder URL	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a single URL to the Library/Folder that the PDF document should be saved in.</p>
Original name/title	Clicking this link opens the standard String Builder:



SharePoint Workflow Activity Toolkit User Guide

	 <p>Type a name for the PDF document.</p>
<p>Properties</p>	<p>Clicking this link opens an inline drop-down with 3 choices:</p> <ul style="list-style-type: none"> <li>• Properties- Choose to convert only item properties</li> <li>• File/attachment- Choose to convert only the attachment (for lists) or files (for libraries)</li> <li>• Both- Choose to convert both items properties and attachments</li> </ul>
<p>Default Settings</p>	<p>Clicking this link opens an inline drop-down with 3 choices:</p> <ul style="list-style-type: none"> <li>• Default settings- the conversion resolution settings will be taken from iMUSH</li> <li>• High resolution settings- the workflow activity will use high resolution (requires more memory)</li> <li>• Standard settings- the workflow activity will use standard resolution</li> </ul>
<p>Default</p>	<p>Clicking this link opens the standard String Builder:</p>  <p>Type a view of the InfoPath form that should be converted to PDF, if you leave this option blank the default InfoPath form view will be used.</p>

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## SUPPORTED COMPARISON OPERATORS

Whenever you click a condition link in SharePoint Designer, you are required to type some property-based condition that is used by the workflow activity to find list item/s. The found items are then processed by the workflow activity (Update, Delete, Copy etc.).

A condition is a single-line string of the following format:

```
[field name][operator][value]
```

The following comparison operators are supported:

Operator	Description
==	Equals
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
!=	Does not equal
()	Contains
==null	Equals null
!=null	Not null

### Usage example:

#### Comparing Date field:

- Due Date>11/11/2011
- Due Date==11/11/2011

#### Comparing Text field:

- Title () SharePoint

#### Comparing Number field:

- %Complete==40%
- %Complete==0.4
- Number != 20

#### Comparing Currency field:

## SharePoint Workflow Activity Toolkit User Guide

- Cost==\$100
- Cost<10,000

### Comparing User field:

- Assigned To==mydomain\user1
- Assigned To==mydomain\user1;mydomain\user2 **(when a user field is configured to allow multi-user)**
- Assigned To==user@kwizcom.com **(you can also use email addresses)**

### Comparing Boolean field:

- Testboolean==1
- Testboolean==yes
- Testboolean==0
- Testboolean!=no
- Testboolean==false
- Testboolean!=true

### Comparing Choice field:

- ChoiceField==Choice1

### Comparing Multi-Choice field:

- Multichoicefield==Choice1;Choice2;Choice3

**IMPORTANT:** choice values must not include the “;” character.

### Comparing Lookup field:

- LookupField==LookupValue1

### Comparing Multi-Lookup field:

- MultiLookupField== LookupValue1; LookupValue2; LookupValue3

**IMPORTANT:** Lookup values must not include the “;” character.

### Comparing Note field:

- Description()test **(finds items where Description field contains the string “test”)**

**IMPORTANT:** Since a Note field may contain html, simple comparison to the visible value won't work. Therefore you'd better use the () operator (contains).

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## SUPPORTED DATE TOKENS

The following tokens are supported inside a condition sentence when comparing to a Date field or when updating a Date field's value:

Token	Description
Today	Returns today's date value
Now	Return current day and time
Y	Year(s)
M	Month(s)
D	Day(s)
h	Hour(s)
m	Minute(s)
s	Second(s)

### Usage example:

- Due Date>=Today+1D
- Due Date<=Today-3M
- Expires!=Now+5h
- Expires<=Now+5D-10h

## FAQ

### DO I HAVE TO INSTALL ANYTHING ON MY COMPANY'S PCS?

No. The product is a server installation. Once installed on the server, it can be used from any client-PC connected to it.

### I RAN THE WORKFLOW BUT NOTHING HAPPENED, WHAT'S WRONG?

Check the workflow history log for any reported errors. Errors may occur due to wrong workflow parameters or insufficient permissions to run the workflow.