



INSTALLATION AND CONFIGURATION MANUAL



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SOFT



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Version History

Change Record

Date	Author	Version	Change reference
2017, October	SharePoint PDF Wizard	1.0.0.0	Initial Release for SharePoint Online.
2019, October	SharePoint PDF Wizard	2.0.0.0	Bug fixes and performance enhancements.

Current Version for SharePoint Online

Name	Version Approved	Compatibility	Date
SharePoint PDF Wizard	SharePoint PDF Wizard 2.0.0.0	SharePoint Online / Office 365. SharePoint 2016 / SharePoint 2019.	2019, November

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Introduction

SharePoint PDF Wizard is the simple, fast and clean way for conversion of files into different file formats from within SharePoint. SharePoint PDF Wizard is feature packed and allows you to automatically generate and output the documents to a user specified SharePoint document library.

You can also create Templates with Pre-set Configuration Settings to perform operations on specific SharePoint document library files on a single click and/or Triggered by an Event!

How does SharePoint PDF Wizard Work?

After you have added the SharePoint PDF Wizard App, the PDF Wizard Option will now be available for all library documents within a site.

Select your source Word or Excel or PowerPoint or PDF document from SharePoint Document Library.














With SharePoint PDF Wizard you can now select operation to perform on selected documents and automatically create output file directly from the Ribbon Menu (PDF Wizard) or files Context Menu.

Customise the file name and specify the SharePoint document library to store the automatically generated documents.

SharePoint PDF Wizard Uses:

Do you need to convert your documents into PDF or merge multiple PDF's into one? or do you want to promote the professional image of your organisation by adding watermarks? or do you want to encrypt / decrypt and/or digitally sign your important business files stored in a SharePoint Document Library? With SharePoint PDF Wizard you can swiftly perform all of these operations from within your SharePoint Document Library files with absolutely no coding!

SharePoint PDF Wizard Features and Benefits:

-  Convert PDF files into Word, PowerPoint, HTML, XML, SVG with NO CODING!
-  Save multiple Word, PowerPoint, HTML, Image files as one PDF file.
-  Very easy to install. Very easy to use, no training required.
-  Tightly integrated into SharePoint. Easy access via Ribbon Menu and Items Context Menu.
-  Specify output SharePoint document library and customise document file names.
-  One click automatic creation of multiple Documents!
-  Merge multiple PDF Files into 1 Single PDF Document.
-  Add watermark to PDF Files.
-  Save Word, Excel and PowerPoint Documents as .PDF.
-  Encrypt, Decrypt or Change Password of PDF file.
-  Digitally sign the PDF file.
-  Set expiry date for the PDF file.
-  Create Templates with Pre-set Configuration Settings to perform operations on specific SharePoint library documents.

SharePoint PDF Wizard Installation (SharePoint Online App)

Types of License

SharePoint PDF Wizard is made available from the Office Store
(<https://store.office.com/WA104379659.aspx>).

Below is the list of SharePoint PDF Wizard License Types;

Trial

- The Trial License can only be used for a single Site. The Trial will expire after 15 days.

User License

- A User License activates **SharePoint PDF Wizard** functionality to all Libraries within a SharePoint Site for the Users who have a License assigned.

Site License

- A Site License activates **SharePoint PDF Wizard** functionality to all Users and on all Lists within the SharePoint Site to which it is applied.

Installing SharePoint PDF Wizard

1. To add an app from the SharePoint Store
2. Verify that the user account that is performing this procedure is a member of the site Owners group.
3. On the home page, under Get started with your site, click Add lists, libraries, and other apps.
4. If the Get started with your site control does not appear on the home page, click the Settings icon, and click View Site Contents, and then on the Site Contents page, click Add an App.
5. Click SharePoint Store.
6. Browse the SharePoint Store for “SharePoint PDF Wizard”.
7. Click the SharePoint PDF Wizard App.
8. Click Details, and then click Trial / Buy It.
9. Follow the steps to log in and purchase the App, if required.
10. In the Grant Permission to an App dialog box, if you trust the App, click Allow Access.
11. The SharePoint PDF Wizard App is now added and appears in the Apps section of your Site Contents list.

How to Use SharePoint PDF Wizard?

Select the required files from SharePoint document library, then select the operation to perform from PDF Wizard dialog box. It will automatically generate and output the generated document/s to a user specified SharePoint document library with customised name.

Using SharePoint PDF Wizard within SharePoint

Once installed SharePoint PDF Wizard options are made available on all SharePoint Document Library Documents Context Menu and the Libraries Ribbon Menu.

Select your source file (Word or Excel or PowerPoint or PDF document) from SharePoint Document Library.

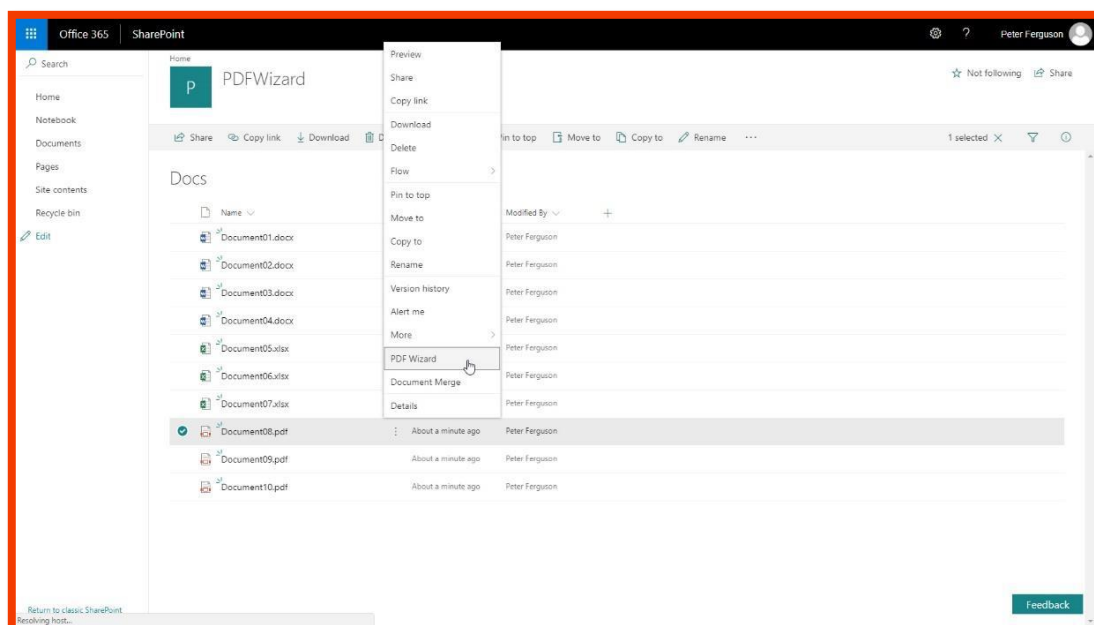
With SharePoint PDF Wizard you can now select operations to perform on selected documents and automatically generate the output file. File selection is done from the Ribbon Menu (PDF Wizard) or the files Context Menu.

Customise the file name and specify the SharePoint document library to store the automatically generated documents.

SharePoint PDF Wizard Operations

Convert PDF To

- This will convert PDF File into other selected format. (DOCX, PPTX, HTML, SVG, XML)
- Go to the required SharePoint Document Library.
- Click on the Context Menu of the Item (Any PDF File) you want to Convert.
- Click PDF Wizard.



- The SharePoint PDF Wizard window will appear. Choose the options as required and click the “Convert” button.

SharePoint PDF Wizard

Configuration Options

No Preconfigured Template

PDF Options

Convert PDF To

☐ Show All Sites (In Site Collection) ☐ Show Sub Sites

☐ Show Library Sub Folders

PDF Options (required)

Select file type to Convert

ID	Source File
555	Test123.pdf

Output Information (required)

qq

Select Output Library

custom file name (optional)

Convert Back to Site

Configuration Options

Select Preconfigured Template: Select a pre-set Configuration Template. Pre-sets are managed via the PDF Wizard App landing page.

PDF Options

Select an Operation to perform: Select related operation to perform with the selected file.

The screenshot displays the SharePoint PDF Wizard interface. At the top, the title 'SharePoint PDF Wizard' is visible. Below it, there are several sections:

- Configuration Options:** A dropdown menu currently shows 'No Preconfigured Template'.
- Select an operation to perform:** A dropdown menu is open, showing a list of operations: 'Convert PDF To' (highlighted), 'Encrypt', 'Decrypt', 'Change Password', 'Digitally Sign', 'Set Expiry Date', 'Convert RGB to Grayscale', and 'Add Watermark'.
- PDF Options (required):** A dropdown menu showing 'Select file type to Convert'.
- Information (required):** A section containing:
 - A dropdown menu for 'Select Output Library'.
 - A text input field for 'custom file name (optional)'.
- Source File Table:** A table with two columns: 'ID' and 'Source File'. It contains one row with the ID '555' and the source file 'Test123.pdf'.
- Buttons:** At the bottom, there are two buttons: 'Convert' and 'Back to Site'.

Show All Sites: Check this option to show all sites in a site collection.

Show Sub Sites: Check this option to Show Sub Sites.

Show Library Sub Folders: Check this option to Show Document Library Sub Folders.

PDF Options (Required)

Select file type to convert: Select the file type into which you want to convert the PDF File.

The screenshot shows the 'SharePoint PDF Wizard' interface. It has a title bar with the SharePoint logo and 'PDF Wizard'. Below the title bar, there are two main sections: 'Configuration Options' and 'PDF Options'. In 'Configuration Options', there is a dropdown menu set to 'No Preconfigured Template'. In 'PDF Options', there is a dropdown menu set to 'Convert PDF To'. Below these, there are three checkboxes: 'Show All Sites (In Site Collection)', 'Show Sub Sites', and 'Show Library Sub Folders'. At the bottom, there is a section titled 'Select Convert PDF To' with a dropdown menu showing 'Select file type to Convert' and a list of file types: DOCX, PPTX, HTML, SVG, and XML. To the right of this, there is a section titled 'Output Information (required)' with three input fields: 'qq', 'Select Output Library', and 'custom file name (optional)'. At the bottom right, there are two buttons: 'Convert' and 'Back to Site'.

Output Information (required)

Select Site for Output Libray: Select the SharePoint Site where you want to save the ouput Word/Excel/PowerPoint Document. Sub Sites will display if the Configuration Option is checked.

Select Output Libray: Select the SharePoint Document Library where you want to save the output Word/Excel/PowerPoint Document. Document Library Sub Folders will display if the Configuration Option is checked.

Custom File Name: Enter a Custom File Name as required. By default the Merged Word/Excel/PowerPoint Document is saved with a file name of the following construct 'TemplateName_BinaryTimeStamp'.

Convert To PDF

- This will convert any Word and/or PowerPoint and/or Excel and/or Image To PDF.
- Go to the required SharePoint Document Library.
- Click on the Context Menu of the Item you want to Convert into PDF.
- Click PDF Wizard.
- The SharePoint PDF Wizard window will appear. Choose the options as required and click the “Convert” button.

SharePoint PDF Wizard

Configuration Options

No Preconfigured Template

PDF Options

Convert To PDF

☐ Show All Sites (In Site Collection) ☐ Show Sub Sites

☐ Show Library Sub Folders

PDF Options (required)

DOCX

ID	Source File
533	LocaleTest.docx

Output Information (required)

qq

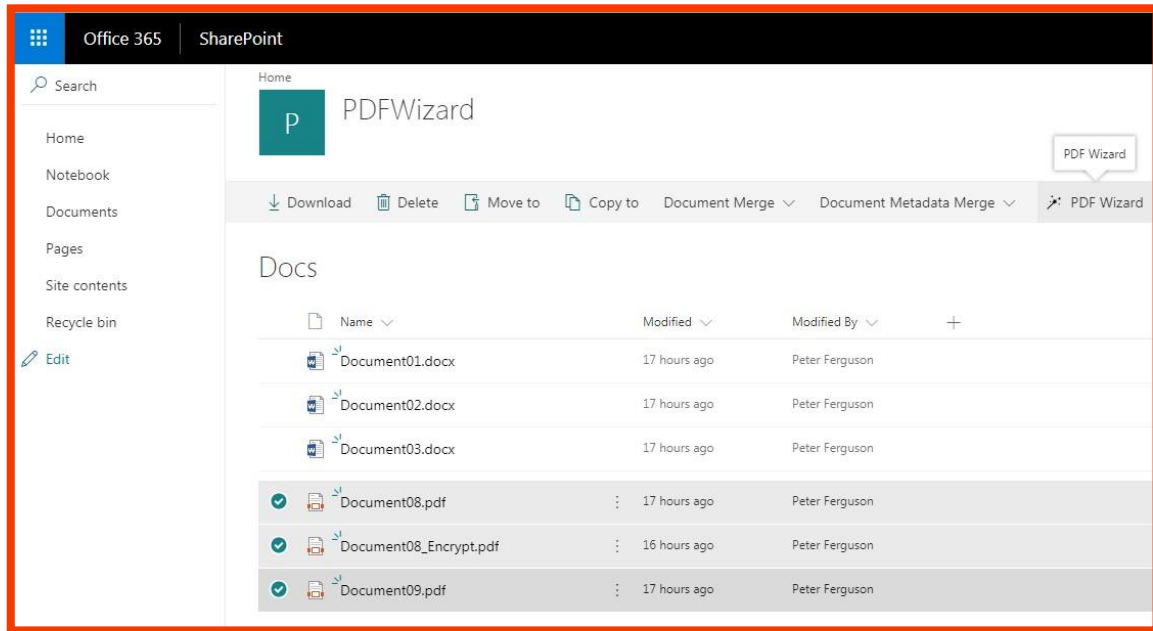
Select Output Library

custom file name (optional)

Convert Back to Site

Merge PDF files

- This will merge multiple PDF files into one PDF file.
- Go to the required SharePoint Document Library.
- Select the multiple PDF files which you want to merge.
- Select “PDF Wizard” action from the Ribbon menu of the SharePoint Document Library.



- The SharePoint PDF Wizard window will appear. Choose the options as required and click the “Merge” button.

The screenshot shows the 'SharePoint PDF Wizard' configuration window. It includes sections for 'Configuration Options', 'PDF Options', 'PDF Options (required)', and 'Output Information (required)'. The 'Merge PDF Files' option is selected under 'PDF Options'. The 'Merge' button is visible at the bottom.

(Documents will be merged in the order they are selected)

Configuration Options

No Preconfigured Template

PDF Options

Merge PDF Files

☐ Show All Sites (In Site Collection) ☐ Show Sub Sites

☐ Show Library Sub Folders

PDF Options (required)

ID	Source File
555	Test123.pdf
557	Document Merge Template_Burke.pdf
558	Document Merge Template_Bailey.pdf

Output Information (required)

qq

Shared Documents

Merged output file name

Merge Back to Site

Encrypt

- This will Encrypt the selected PDF file.
- Go to the required SharePoint Document Library.
- Click on the Context Menu of the Item you want Encrypt. Or
- Select the PDF files which you want to Encrypt.
- Then Select “PDF Wizard” action from the Ribbon menu of the SharePoint Document Library.
- The SharePoint PDF Wizard window will appear. Choose the options as required and click the “Encrypt” button.

SharePoint PDF Wizard

Configuration Options

No Preconfigured Template

PDF Options

Encrypt

☐ Show All Sites (In Site Collection) ☐ Show Sub Sites

☐ Show Library Sub Folders

PDF Options (required)

Owner Password *

User Password *

Output Information (required)

qq

Shared Documents

ID	Source File
555	Test123.pdf
557	Document MergeTemplate_Burke.pdf
558	Document MergeTemplate_Bailey.pdf

Encrypt Back to Site

PDF Options (Required)

Owner Password: Enter the password for the Owner to encrypt the PDF file.

User Password: Enter the password for the User to encrypt the PDF file.

Decrypt

- This will Decrypt the selected PDF file.
- Go to the required SharePoint Document Library.
- Click on the Context Menu of the file you want Decrypt. Or
- Select the PDF files which you want to Decrypt.
- Then Select “PDF Wizard” action from the Ribbon menu of the SharePoint Document Library.
- The SharePoint PDF Wizard window will appear. Choose the options as required and click the “Decrypt” button.

The screenshot shows the 'SharePoint PDF Wizard' window. The 'Configuration Options' section has a dropdown set to 'No Preconfigured Template'. The 'PDF Options' section has a dropdown set to 'Decrypt', which is highlighted with a red box. Below this are three checkboxes: 'Show All Sites (In Site Collection)', 'Show Sub Sites', and 'Show Library Sub Folders', all of which are unchecked. The 'PDF Options (required)' section has a text input field for 'Owner Password' with a lock icon and an asterisk, also highlighted with a red box. The 'Output Information (required)' section has two dropdowns: the first is set to 'qq' and the second is set to 'Shared Documents'. At the bottom, there is a table with three rows of source files and two buttons: 'Decrypt' and 'Back to Site'.

ID	Source File
555	Test123.pdf
557	Document Merge Template_Burke.pdf
558	Document Merge Template_Bailey.pdf

PDF Options (Required)

Owner Password: Only password of the Owner to decrypt the PDF file.

Change Password

- This will Change Password for the selected PDF file.
- Go to the required SharePoint Document Library.
- Click on the Context Menu of the file for which you want change the password.
- The SharePoint PDF Wizard window will appear. Choose the options as required and click the “Change Password” button.

The screenshot shows the SharePoint PDF Wizard interface. The 'Configuration Options' section has 'No Preconfigured Template' selected. The 'PDF Options' section has 'Change Password' selected, which is highlighted with a red box. Below this, there are checkboxes for 'Show All Sites (In Site Collection)', 'Show Sub Sites', and 'Show Library Sub Folders'. The 'PDF Options (required)' section has three password fields: 'Owner Password', 'New Owner Password', and 'New User Password', all of which are highlighted with a red box. The 'Output Information (required)' section has three fields: 'Select Site for Output Library', 'Select Output Library', and 'custom file name (optional)'. At the bottom, there is a table with columns 'ID' and 'Source File' containing one row with ID '555' and Source File 'Test123.pdf'. Below the table are two buttons: 'Change Password' and 'Back to Site'.

PDF Options (Required)

Owner Password: Only the password of the Owner is require to change the password of Encrypted PDF file.

New Owner Password: New password for Owner.

New User Password: New Password for User.

Digitally sign

- This will Digitally Sign for the selected PDF file.
- Go to the required SharePoint Document Library.
- Click on the Context Menu of the file to Digitally sign the PDF File.
- The SharePoint PDF Wizard window will appear. Choose the options as required and click the “Add digital Signature” button.

SharePoint PDF Wizard

Configuration Options

No Preconfigured Template

PDF Options

Digitally Sign

☐ Show All Sites (In Site Collection) ☐ Show Sub Sites

☐ Show Library Sub Folders

PDF Options (required)

Choose File certificate.pfx Choose certificate file

Choose File signature1.png Choose signature file

..... ✓ First Page

Output Information (required)

Select Site for Output Library

Select Output Library

custom file name (optional)

ID	Source File
555	Test123.pdf

Add Digital Signature Back to Site

PDF Options (Required)

Choose certificate file: upload certificate file from the local file system.

Choose signature file: upload signature file from the local file system to add digital signature to the PDF File.

Password: Password of the certificate file.

Select page to add signature: select page (First or Last) to add digital signature to the page.

Set Expiry Date

- This sets the expiry date to PDF file.
- Go to the required SharePoint Document Library.
- Click on the Context Menu of the file to set expiry date to the PDF File.
- The SharePoint PDF Wizard window will appear. Choose the options as required and click the “Add Expiry Date” button.

SharePoint PDF Wizard

Configuration Options

No Preconfigured Template

PDF Options

Set Expiry Date

☐ Show All Sites (In Site Collection) ☐ Show Sub Sites

☐ Show Library Sub Folders

Select expiry date for the PDF File(s) (required)

06-10-2017

ID	Source File
555	Test123.pdf

Output Information (required)

Select Site for Output Library

Select Output Library

custom file name (optional)

Add Expiry Date Back to Site

PDF Options (Required)

Select expiry date for the PDF File(s): Select date to add as a expiry date for the PDF file.

Convert RGB to Grey Scale

- Convert RGB content of PDF file to Grey Scale.
- Go to the required SharePoint Document Library.
- Click on the Context Menu of the file.
- The SharePoint PDF Wizard window will appear. Choose the options as required and click the “Convert” button.

SharePoint PDF Wizard

Configuration Options

No Preconfigured Template

PDF Options

Convert RGB to Grayscale

☐ Show All Sites (In Site Collection) ☐ Show Sub Sites

☐ Show Library Sub Folders

PDF Options (required)

ID	Source File
555	Test123.pdf
557	Document Merge Template_Burke.pdf
558	Document Merge Template_Bailey.pdf

Output Information (required)

Select Site for Ouput Library

Select Output Library

Convert Back to Site

Add Watermark

- This will Add watermark to the selected PDF file.
- Go to the required SharePoint Document Library.
- Click on the Context Menu of the file to Add watermark to the PDF File.
- The SharePoint PDF Wizard window will appear. Choose the options as required and click the “Add Watermark” button.

PDF Options (Required)

Choose Image file to add as a watermark: Upload Image file to add as a watermark to the PDF file from the local file system.

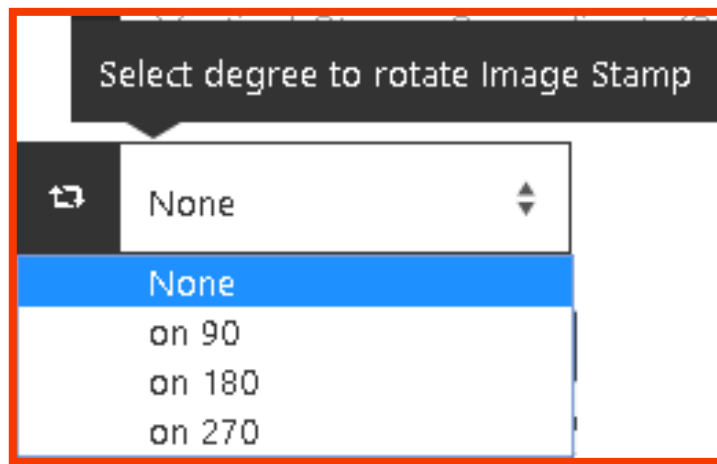
Width: Width of the watermark image accepts only integer values for eg: 100

Height: Height of the watermark image accepts only integer values for eg: 100

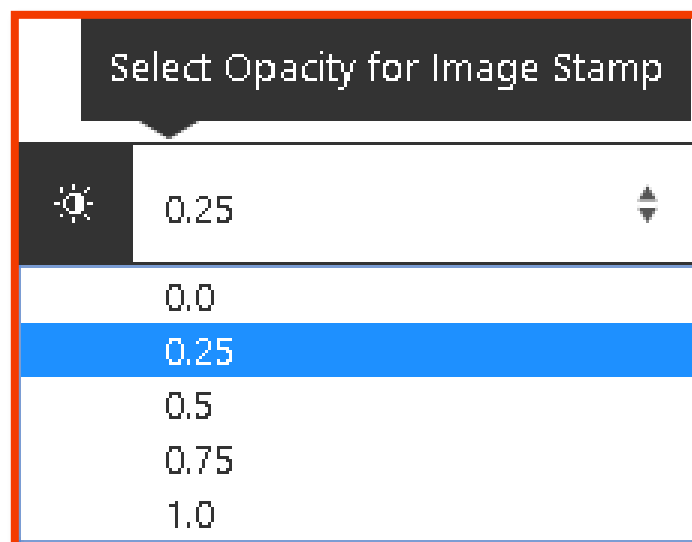
Horizontal Stamp Co-ordinates: Specifies horizontal specing of the the watermark image file starts for left to right, accepts only integer value eg: 100

Vertical Stamp Co-ordinates: Specifies Vertical specing of the the watermark image file starts for bottom to top, accepts only integer value eg: 100

Select degree to rotate image stamp: Select degree to rotate the watermark imge file.




Select opacity for Image stamp: Select opacity of the watermark In the PDF file.



Merge as one PDF

- This will merge multiple documents of different types as a single PDF file.
- Go to the required SharePoint Document Library.
- Select the multiple files which you want to merge.
- Select “PDF Wizard” action from the Ribbon menu of the SharePoint Document Library.
- The SharePoint PDF Wizard window will appear. Choose the options as required and click the “Convert” button.


SharePoint PDF Wizard

(Documents will be merged in the order they are selected)

Configuration Options

No Preconfigured Template

PDF Options

Merge as one PDF

☐ Show All Sites (In Site Collection)
 ☐ Show Sub Sites

☐ Show Library Sub Folders

PDF Options (required)

ID	Source File
46	Title1.docx
533	LocaleTest.docx
550	Try.docx
555	Test123.pdf
556	pdf-icon-box.png
1	2

Output Information (required)

Select Site for Output Library

Select Output Library

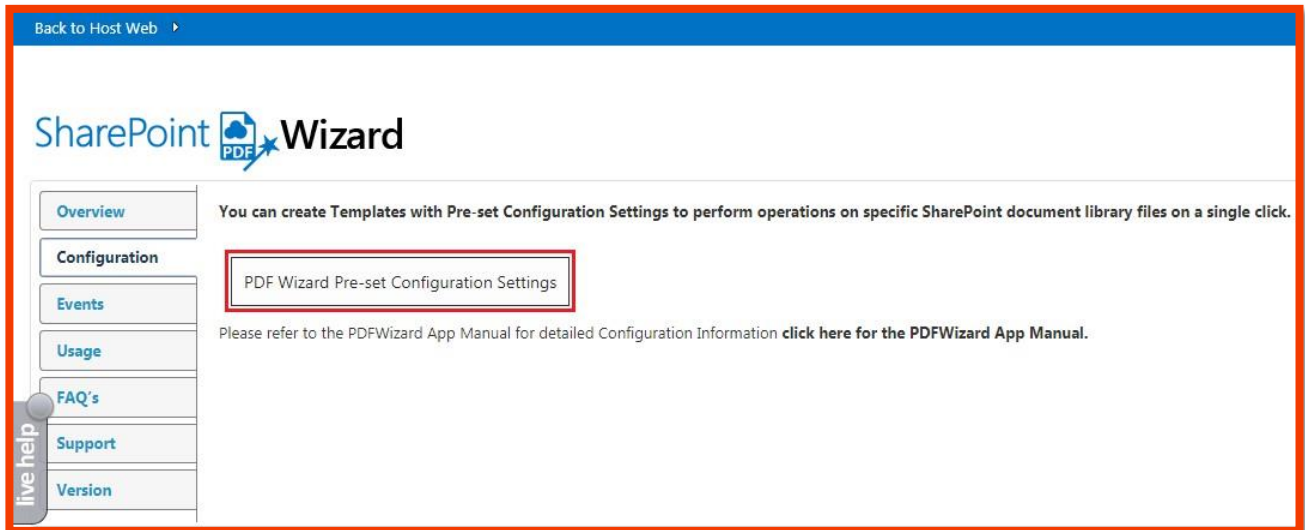
Merged output file name *

Merge

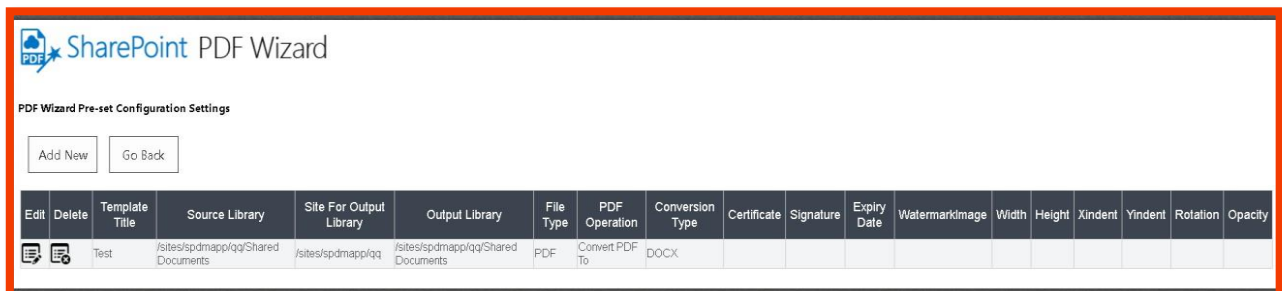
Back to Site

Create a pre-set PDF Wizard Configuration Template for a Library

You can predefine the SharePoint PDF Wizard options for a SharePoint Document Library via the PDF Wizard App landing page and clicking the 'SharePoint PDF Wizard Pre-set Configuration Settings' button.



You can Save and Edit unlimited SharePoint PDF Wizard Pre-set Configuration Settings for your SharePoint Libraries.



Template Settings and Configuration Options

Enter Unique Template Name: Enter a name to identify the pre-set Configuration Template.

Set as list default: Check this option to make this the default pre-set configuration settings for the selected library. These settings will load when PDF Wizard is selected for the specified library.

Select the source library for which this template settings apply: Select the SharePoint library, from within the site, for which the pre-set configuration settings will apply.

PDF Operations (Required)

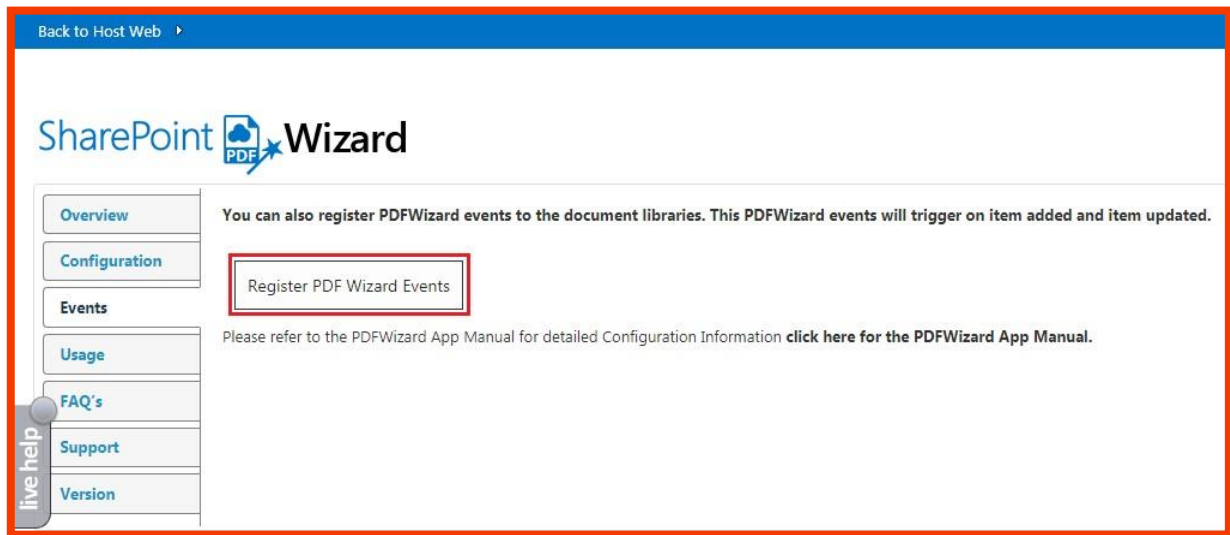
Select file types to perform operation: Select the type of files for which you want to select operations and store as Pre-config settings.

*All other options for setup are described above (pages 10 and 11).

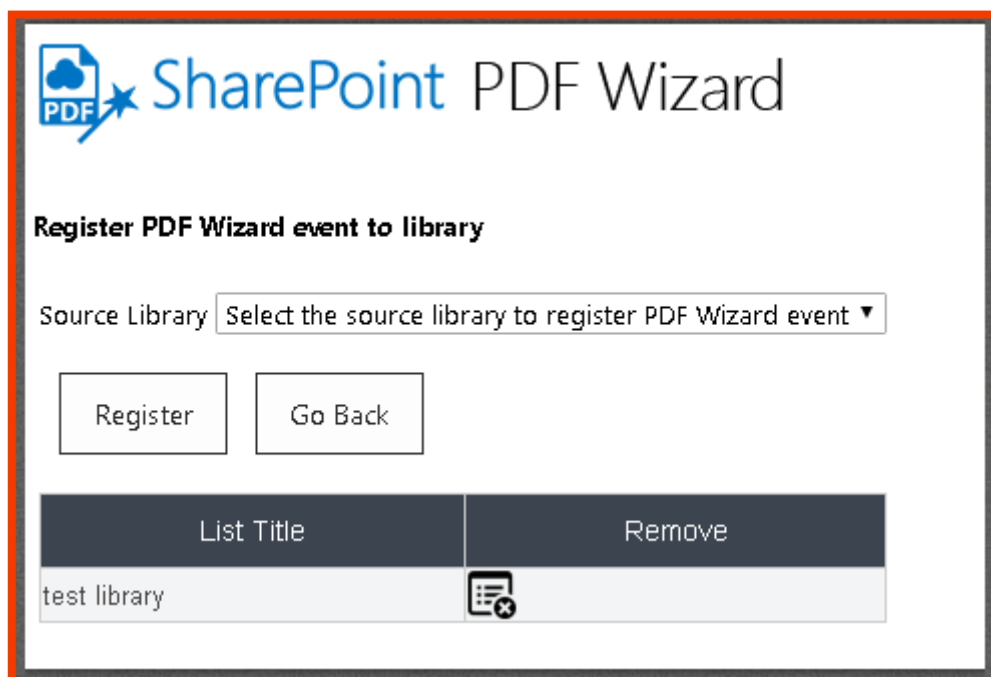
Trigger PDF Wizard events on item added and item updated (Remote Event Receiver Automated Workflows)

Following are the steps to use PDF Wizard App Remote Event Receiver:

Step 1: Click on PDF Wizard app landing page:

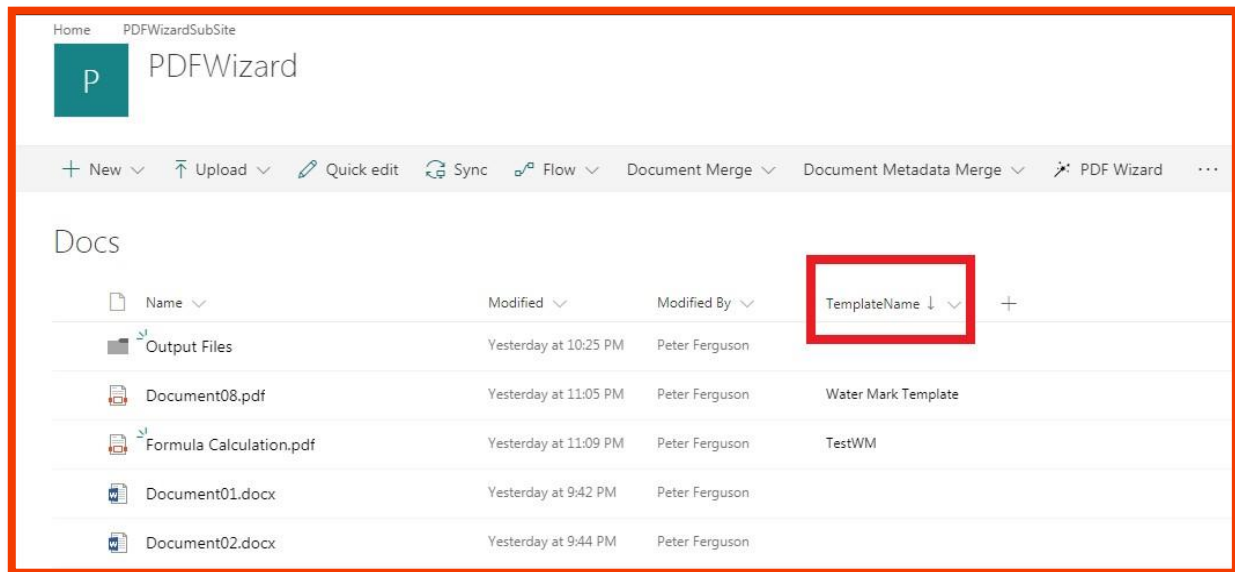


Step 2: Then click on “Register PDF Wizard Events” button.

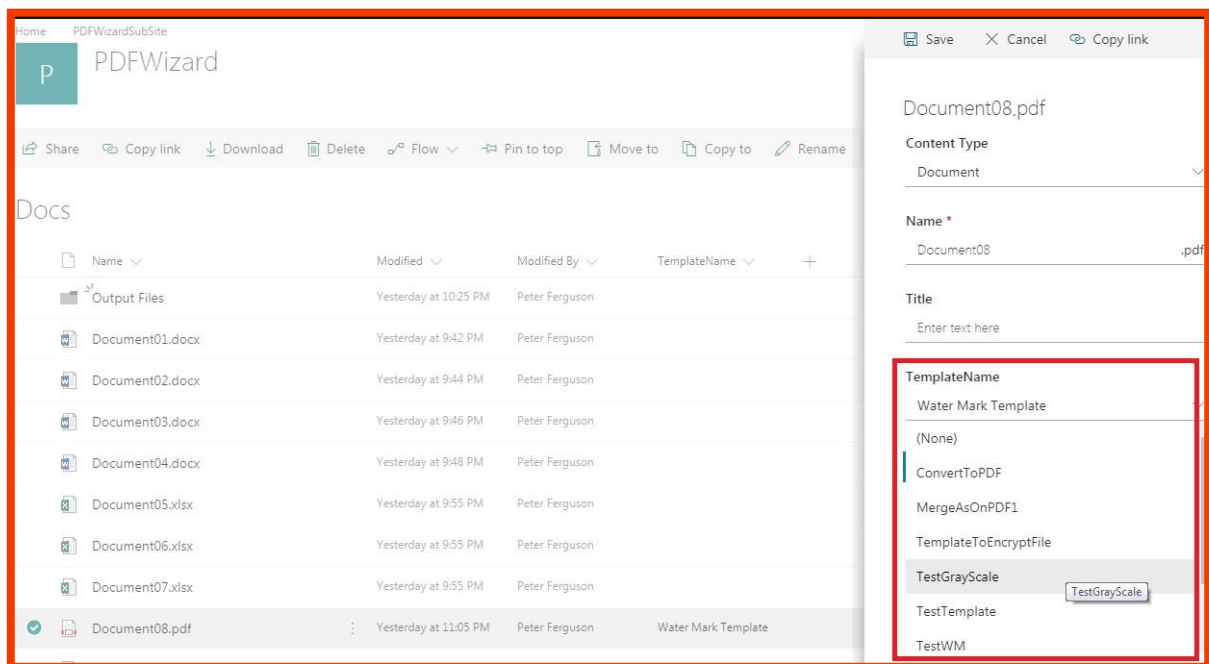


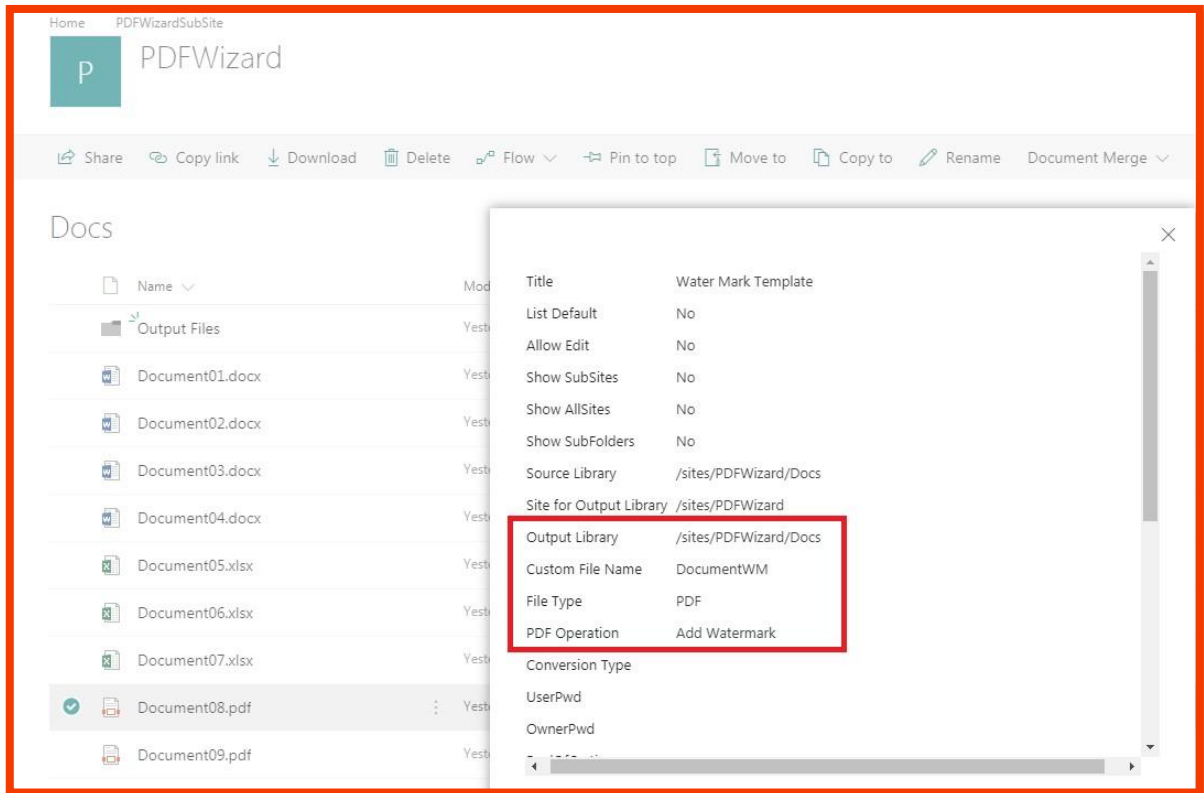
- Here you can register the PDF Wizard event to the specific library on which you want to perform PDF Wizard events.
- It will trigger on item added and item updated.

- It will add one additional column to your library "TemplateName" which will be the lookup of "SharePoint PDF Wizard Pre-set Configuration Settings".



- Now you are required to select correct template title which you have created, from the dropdown, to get done the correct PDF Wizard operation when you are uploading or editing any item from the Document Library.





Step 3: Whenever you will add/update a file to the library it will generate output document to the destination library.

SharePoint PDF Wizard Support

Thank you for choosing **SharePoint PDF Wizard**.

If you require any further assistance please visit our online Support Centre or Contact Us.

<http://cirrussoft.support>

<https://sharepointpdfwizard.com>

INSTALLATION AND CONFIGURATION MANUAL

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