

# ***PDF Converter for SharePoint***

Convert documents directly from the SharePoint  
user interface or via workflows



# *Today's Webinar is presented by*



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# About Muhimbi

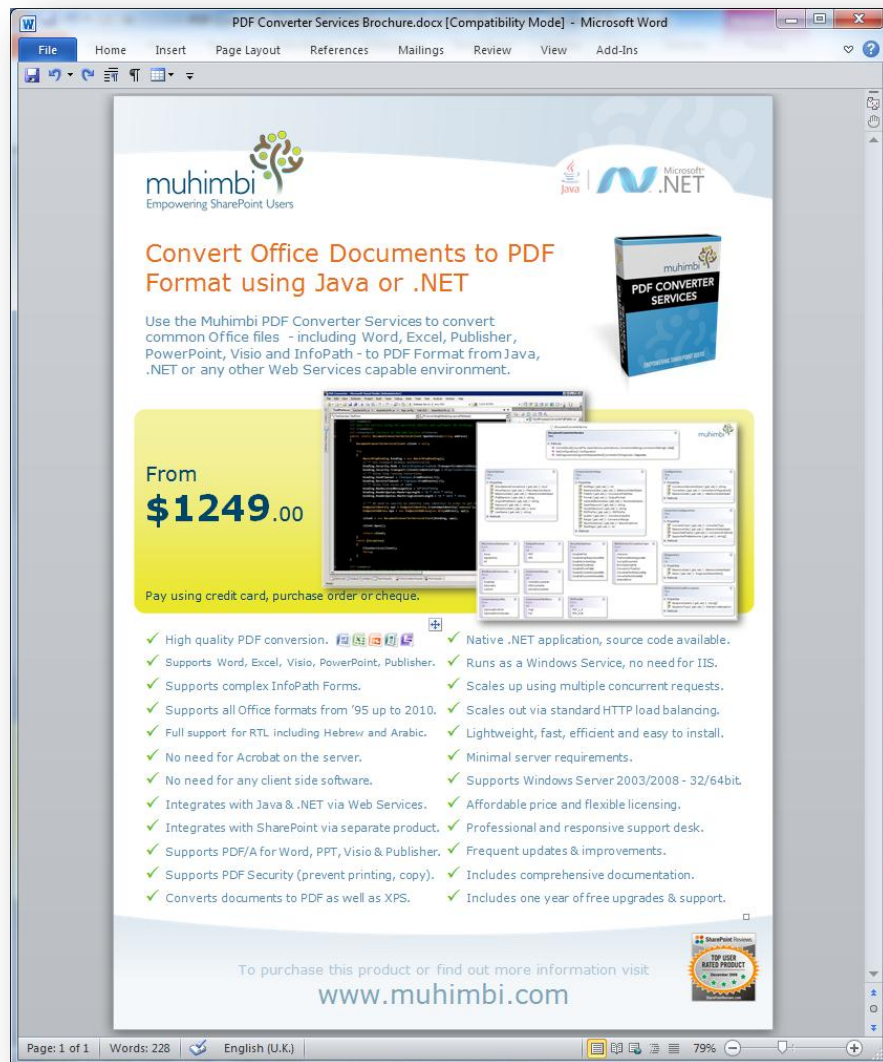
- UK based product development company specialising in the SharePoint Market.
- Highly focussed on the development and support of our products, including:



- Product Overview & benefits for your organisation
- Technical Overview
- Lots of demos!
  - Conversion using the SharePoint User Interface
  - Conversion using a SharePoint Designer workflow
  - Conversion using Nintex workflow
  - Adding Dynamic watermarks
  - Use with InfoPath

- Compatible with any SharePoint 2007 / 2010 version
- Use via GUI, workflows or web service calls.
- High quality conversion of many document types including MS-Word, MS-Publisher, InfoPath, Excel, PowerPoint, ODF, HTML, AutoCAD, TIFF
- Full support for 'Right-To-Left' languages (Hebrew, Arabic)
- Works with SharePoint Designer and Nintex Workflow
- Available in multiple languages.
- Easy to deploy.
- Includes comprehensive documentation.

# Perfect conversion Fidelity



Original Document in Word 2010



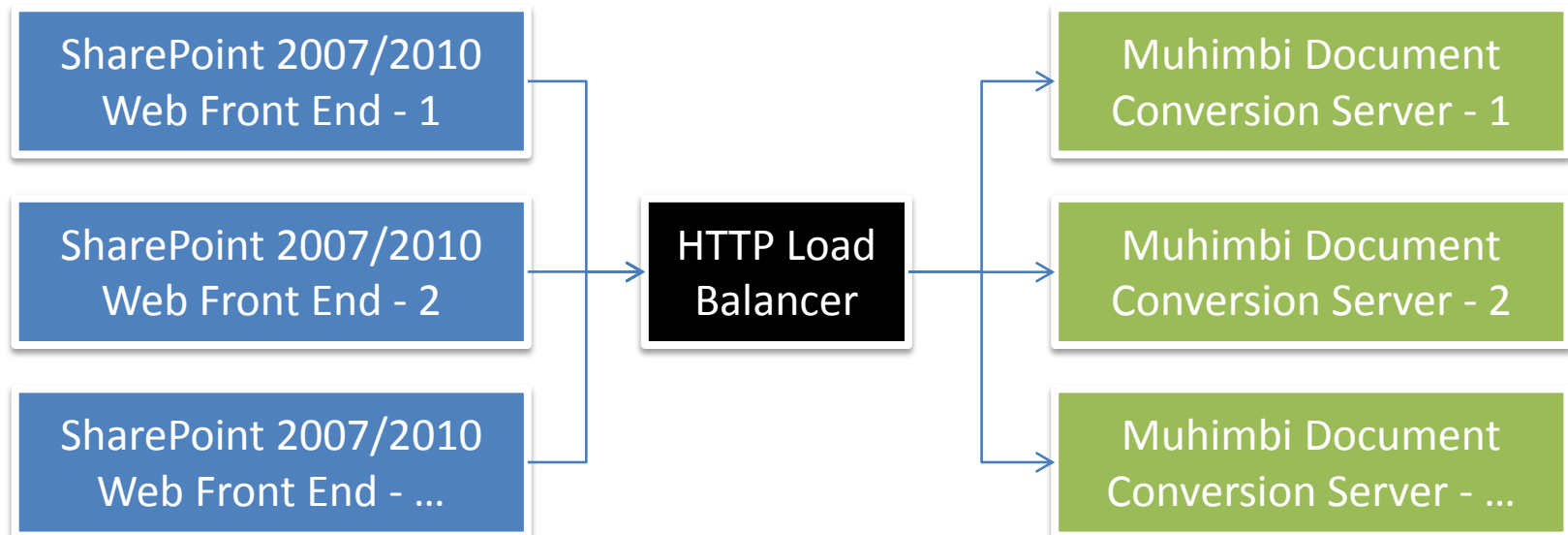
Converted PDF Document

- Fully automate the generation of PDF files.
- Include the generation of PDF files into your business processes.
- Convert incoming faxes or scans directly into PDF format.
- Convert Web Pages to PDF for approval of publishing site.
- Share *Read Only* versions of documents with outsiders.
- Archive files in PDF/A\* format.
- Trace the origin of documents by adding watermarks.
- Disable printing and copying of sensitive information.
- Make filled out InfoPath forms available to everyone.
- Make documents available on non Microsoft Platforms.

\* PDF/A is a file format for the long-term archiving of electronic documents. It is based on the Adobe PDF Reference Version 1.4 ([en.wikipedia.org/wiki/PDF/A](http://en.wikipedia.org/wiki/PDF/A))

# Architectural Overview

- SharePoint 2007/2010 Front end, workflow activities.
- WCF (Web Services based) Document Conversion Service
- Simple / Small deployments 'install all on same machine'. Or
- Large / highly scalable deployments:
  - Scale up using parallel processing.
  - Scale out using standard HTTP load balancers.





# Supported file formats

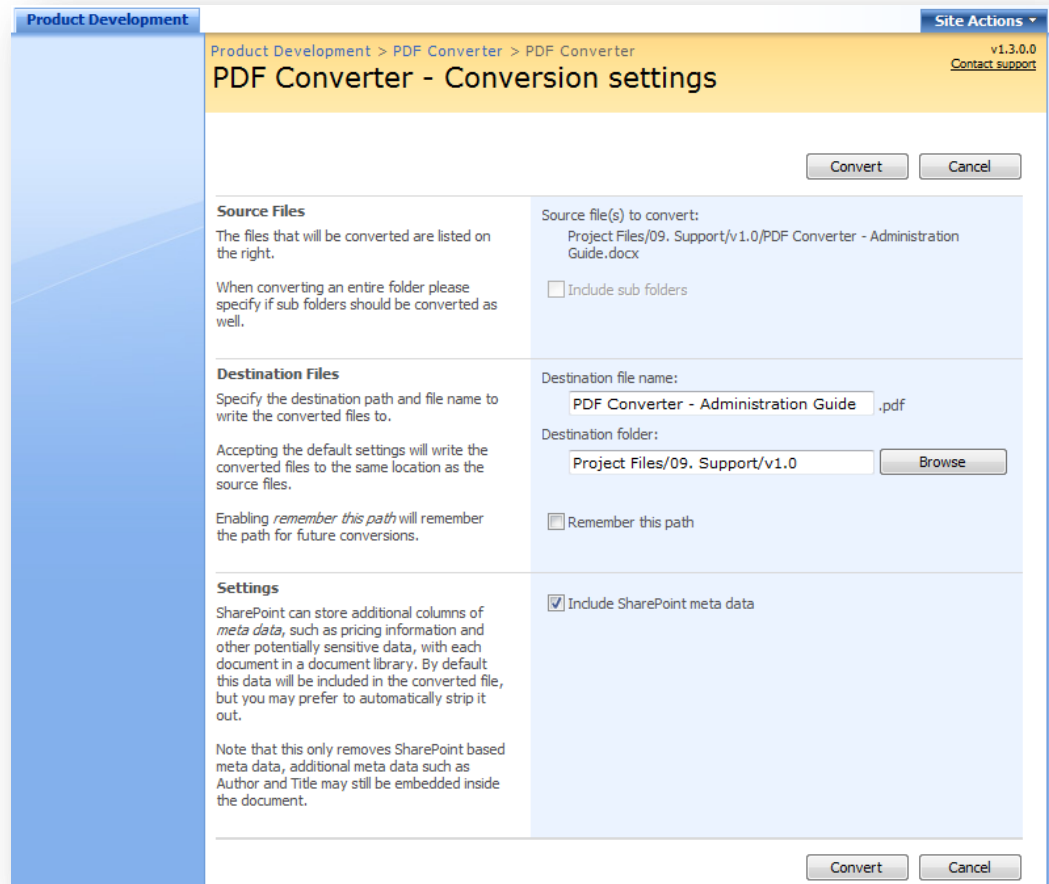
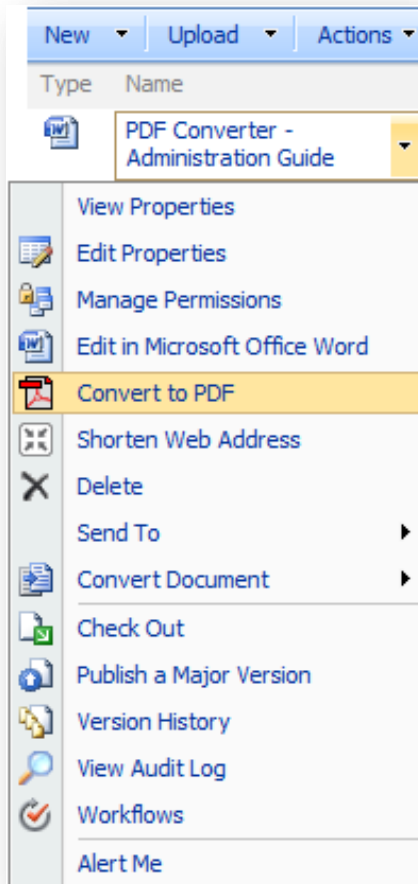
Document Type	File Types*
Word Processing	doc, docx, docm, rtf, txt, xml, odt, wps.
Spreadsheets	xls,xlsx, xlsx, xlsb, xml, csv, dif, ods.
Presentations	ppt, pptx, pptm, xml, odp, pps, ppsx, ppsm.
InfoPath	xml, infopathxml.
Publisher	pub (2000-2010).
Email	eml.
Visio & Vector formats	vsd, vdx, svg, svgz.
HTML	Html, mht, aspx, jsp.
Images	tiff (including multi page), gif, jpg, bmp, png.
AutoCAD	dxf, dwg

*\* All Office versions from '95 up to 2010 are supported*

## ***Poll 1***

What file types are you most interested in converting to PDF?

# Convert files via SharePoint's GUI



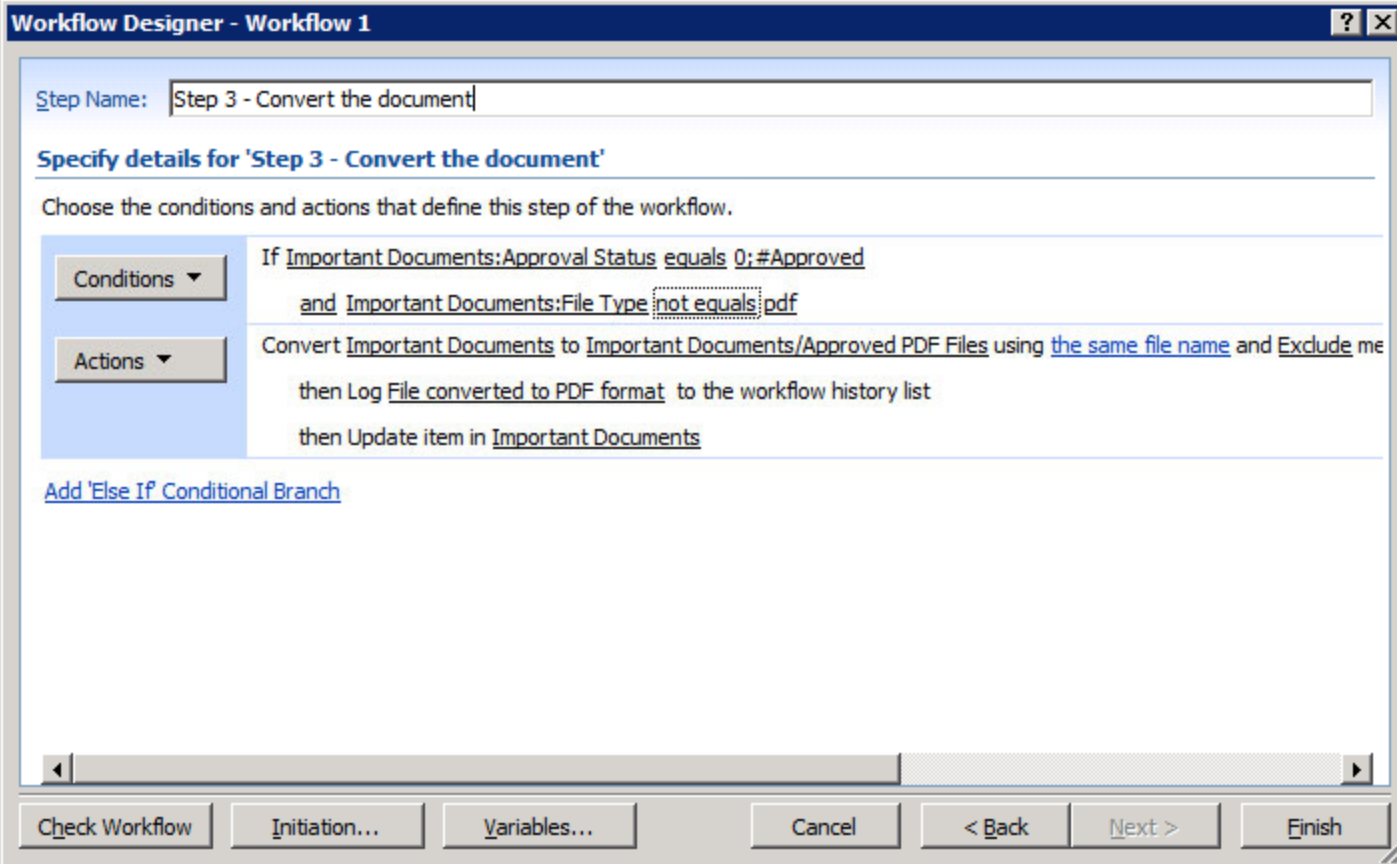
# ***DEMO***

Converting documents using the  
SharePoint User Interface

# ***DEMO***

Converting InfoPath forms with  
attachments

# Convert files via a Workflow



**Workflow Designer - Workflow 1**

Step Name:

**Specify details for 'Step 3 - Convert the document'**

Choose the conditions and actions that define this step of the workflow.

**Conditions** ▼

If Important Documents:Approval Status equals 0;#Approved  
and Important Documents:File Type not equals pdf

**Actions** ▼

Convert Important Documents to Important Documents/Approved PDF Files using the same file name and Exclude me  
then Log File converted to PDF format to the workflow history list  
then Update item in Important Documents

[Add 'Else If' Conditional Branch](#)

*Sample workflow created in SharePoint Designer*

## ***Poll 2***

How would you prefer to convert files to PDF in SharePoint?


# ***DEMO***


Converting documents using a  
SharePoint Workflow



# Control which converters are enabled

Central Administration

Welcome Jeroen Ritmeijer | My Site | My Links | 

 **Central Administration**

Home Operations **Application Management** Site Actions

Central Administration > Application Management > Document Converter Settings v3.0.0.11 [Contact support](#)

## Document Converter Settings


**View All Site Content**

**Central Administration**

- Operations
- Application Management

**Shared Services Administration**

- SharedServices

 **Recycle Bin**

**Conversion server**

Please specify the address and port number of the Muhimbi Conversion server, e.g. *http://conversion.acme.local:8080*.

**Address**

Connection with Conversion Service established successfully.

**Conversion file formats**

Specify which file types are allowed to be converted on this server.

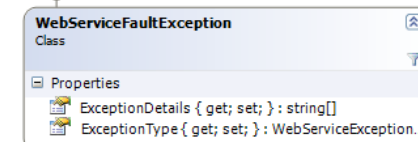
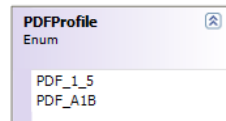
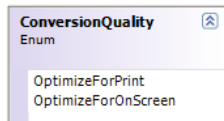
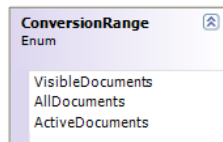
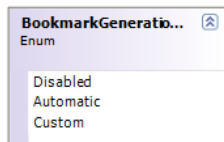
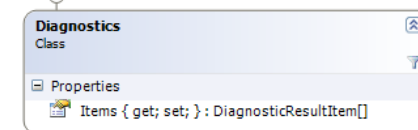
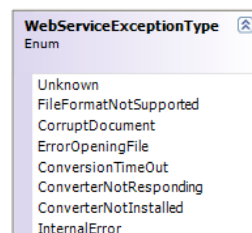
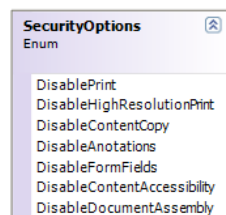
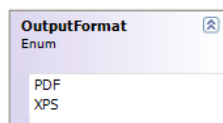
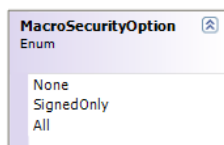
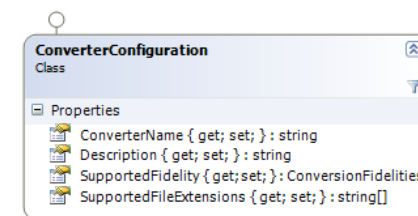
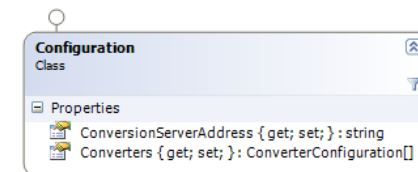
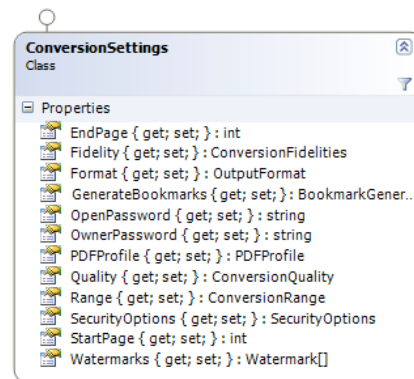
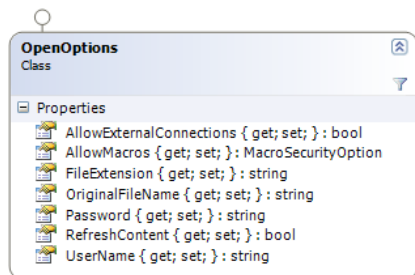
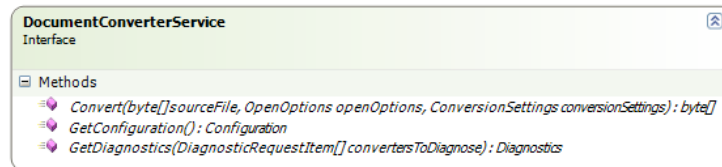
Note that for each file type the corresponding MS-Office 2007 application will need to be present on the conversion server.

- ☒ Word Processing (e.g. MS-Word, RTF, TXT)
- ☒ Spreadsheets (e.g. Excel, CSV)
- ☒ Presentations (e.g. PowerPoint)
- ☒ Microsoft Publisher
- ☒ InfoPath Forms
- ☐ Vector based formats (e.g. Visio, AutoCAD, SVG)
- ☐ OneNote
- ☐ HTML based files (e.g. ASPX, HTML, MHT)

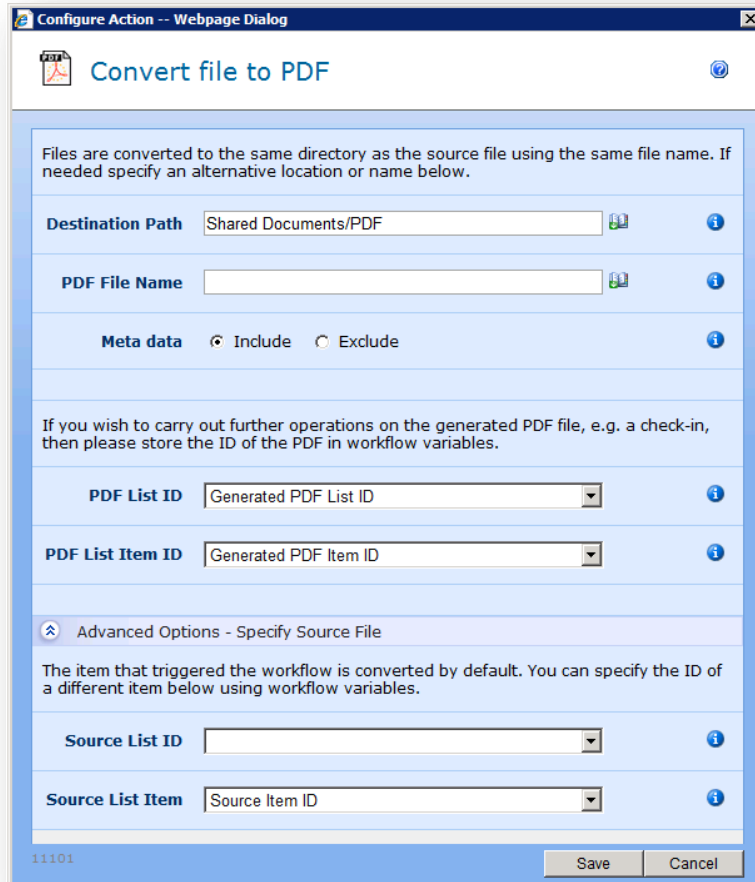
**Validate Settings**

Validate the settings are correct and all required components and dependencies have been installed and configured properly.

# Convert files using a Web Service



# Convert files via a Workflow



**Configure Action -- Webpage Dialog**

**Convert file to PDF**

Files are converted to the same directory as the source file using the same file name. If needed specify an alternative location or name below.

**Destination Path**

**PDF File Name**

**Meta data** ☒ Include ☐ Exclude

If you wish to carry out further operations on the generated PDF file, e.g. a check-in, then please store the ID of the PDF in workflow variables.

**PDF List ID**

**PDF List Item ID**

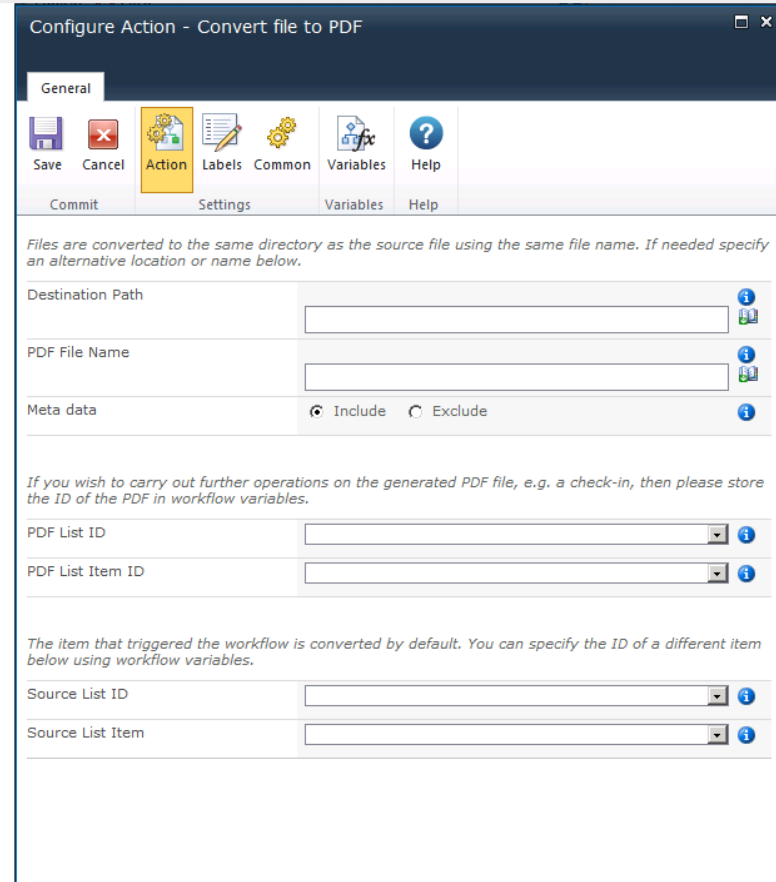
**Advanced Options - Specify Source File**

The item that triggered the workflow is converted by default. You can specify the ID of a different item below using workflow variables.

**Source List ID**

**Source List Item**

11101 Save Cancel



**Configure Action - Convert file to PDF**

**General**

Save Cancel Action Labels Common Variables Help

Commit Settings Variables Help

Files are converted to the same directory as the source file using the same file name. If needed specify an alternative location or name below.

**Destination Path**

**PDF File Name**

**Meta data** ☒ Include ☐ Exclude

If you wish to carry out further operations on the generated PDF file, e.g. a check-in, then please store the ID of the PDF in workflow variables.

**PDF List ID**

**PDF List Item ID**

The item that triggered the workflow is converted by default. You can specify the ID of a different item below using workflow variables.

**Source List ID**

**Source List Item**

*Compatible with Nintex Workflow 2007 & 2010*

# ***DEMO***

## Converting documents using Nintex Workflow

# Add Watermarks, Headers & Footers

- Create watermarks using complex shapes consisting of PNG, GIF, TIFF, BMP, JPG, lines, circles, free text as well as other PDF and RTF files.
- Create headers and footers that include page numbers, date, time and other field codes.
- Apply different watermarks depending on page number, page orientation and paging interval.



# ***DEMO***

Adding watermarks and securing PDFs  
using a workflows

PDF Converter Test Site Welcome Jeroen Ritmeijer | [My Site](#) | [My Links](#) | [v4.2.0.44](#) [Contact support](#)

**PDF Converter Test Site**

[Home](#) [Subsite 1](#) [InfoPath](#) [Nintex](#) [Site Actions](#)

PDF Converter Test Site > Shared Documents > Settings > Watermark Settings

## Watermark Settings

Specify and enable watermarking options for the current List. Watermarks can also be applied using [Workflows](#).

**Watermarking for Open events**

When enabled at the List or Library level, these watermarking options will be applied automatically when this event occurs.

For any watermarks that require a file path to be specified, please use either an absolute path including the site collection (e.g. `/sites/marketing/logos/logo.pdf`) or a path relative to the site collection (e.g. `logos/logo.png`).

You can specify *merge fields* in the content of the watermark such as the name of a column, e.g. `{Title}`. [Learn more about merge fields](#).

For full control over the look and feel of a watermark, including page ranges – intervals and orientation, or to combine multiple watermarks, please select the *Free Form* watermark type. [Learn more about the xml based syntax](#).

**Filter for Open events**

Apply the watermark to all documents, or to specific items, by using a filter.

☒ Enable watermarking

Watermark type:

Watermark content:

Horizontal Position:  Vertical Position:

Width (in pt):  Height (in pt):  Rotate (in °):  Opacity (in %):

Font family:  Size:  Color:

Font style: ☒ Bold ☒ Italic ☐ Underline ☐ Strikeout

☒ Apply filter

Watermark items when column:

[Debug \(delete\)](#) [OK](#) [Cancel](#)

## ***DEMO***

Applying watermarks when document is opened.



# Server Requirements

Operating Systems	Windows Server 2003 - 32 / 64 bit inc R2 Windows Server 2008 - 32 / 64 bit inc R2
SharePoint versions	Windows SharePoint Services 3.0 RTM / SP1 / SP2 Microsoft Office SharePoint Server 2007 RTM / SP1 / SP2 SharePoint Foundation 2010 / SharePoint Server 2010
Browser versions	Internet Explorer 6, 7, 8 Firefox 2, 3
Memory	Depends on the size and complexity of the documents that are converted and the number of concurrent conversions taking place. We recommend a minimum of 1.5GB of total memory.
CPU	Any CPU that can comfortably run SharePoint will be suitable. We recommend one or more multi-core CPUs.
Disk Space	This product requires 10MB of disk space.

# Supported Languages

Language	Availability
English	Now
Dutch	Now
German	Now
Japanese	Now
French	Now
Traditional Chinese	Now
Others	<i>On request</i>

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	Unlimited Developers	Unlimited Servers	Redistributable	Includes Source code	Price
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Enterprise License	✓	✓	-	-	\$4,999
OEM License	✓	✓	✓	-	\$9,999
OEM + Source License	✓	✓	✓	✓	\$14,999

## ***Poll 3***

At what time scale do you need PDF  
Conversion in SharePoint?

## *Questions?*

Ask them now via the meeting window or  
email [jritmeijer@muhimbi.com](mailto:jritmeijer@muhimbi.com)