SharePoint Data Doc Professional User Guide



Declan Colman

Merge SharePoint list data into MS Word documents, create queries, add tables and create document batches, here's how!

DC Software Solutions

11/5/2013

Table of Contents

Terminology:	
Introduction:	
Concept:	
Connecting to your SharePoint server:	4
Quick Start Guide:	4
How To:	6
Add a New Dataset:	6
Advanced Field Settings:	7
Add a New Query Definition:	
Load Saved Query Definition:	
Delete Saved Query Definition:	
Add a New Table Definition:	9
Load Saved Table Definition:	
Delete Saved Table Definition:	
Create a Batch Document Definition:	
Load Batch Document Definition:	
Delete Batch Document Definition:	
Place Data Bookmarks into your document:	
Fetch SharePoint Data:	
Run a Batch document:	
Default Field Formats:	
Refresh the tables of your active document:	
Release Note Inclusions – How to Use New Functionality	
Version 1.4.0.1 – Field Format Use	
Version 1.5.0.6 – Refresh All Data Use	
Version 1.5.0.11 – Hide/Show Field Use	
Version 1.6.0.1 – E-Shot Use	
Version 1.7.0.5 – Table Column Options and Batch Update Query Use	21
Miscellaneous	23
Where to Store your SPDD template documents?	

SharePoint Data Doc Professional User Guide

How the Batch Works	23
Groups of Batches	23
Details of XML Settings file	24
Appendix I: Table Formats	25

Terminology:

Data Set – A data structure that is used to store the details about a SharePoint List. This allows us to create and store local field information such as field formatting and aliases, as well as storing an easy to access run down on a lists details.

Query Definition – A data structure that encapsulates the stored details of a query against a related Data Set (so a query on a SharePoint List). You can have many query definitions attached to the same Data Set. The Query Definition is then used to create Tables, run batches of documents and refresh data from the server.

Table Definition – A data structure used to store the details of tables you create that can be added to your documents. Tables can be dropped into documents as a bookmark which can then be refreshed with live data.

Introduction:

W 🚽 -	🗑 🛃 🖓 🔹 🚰 🗋 🗮 🖉 🖉 🖉 🖉							Document	Document1 - Microsoft Word			
File	Home	Insert	Page Layout	References	Mailings	Review	View	SharePoint Data Doc	Pro			
🕜 Data E 🔡 Defau	Doc Setup It Options	Add Dat	a Sets ery Definitions le Definitions	Add Batch D	ocuments ,	Add Compo	site Bookm	lark Place Data Bookmark	Fetch SharePoint Dat	😤 Run E-Shot 🔂 Run Batch Documents a 🔂 Run Batch Groups	Refresh All Document Data	Hide All Other Buttons
Sett	ings			Crea	ite			Data Bookmarks		Data Fetch		Data Refresh

SharePoint Data Doc makes it easy to work with SharePoint list data from within MS Word. Query your data on SharePoint with the custom query builder and input it directly into your active document.

Create your own tables using your SharePoint data and then add them anytime directly to your active MS Word document. Then, at any stage, refresh them with live data from your SharePoint server.

Save your documents with SharePoint Data Doc bookmarks, and then re-use them to make your document processing a breeze.

Use the batch functionality to automate the generation of your documents from your SharePoint data.

SharePoint Data Doc uses Windows SharePoint Services to return the data you need from your server at top speed. By specifying named data sets you can add field identification bookmarks to your active document. SPDD then uses these identification bookmarks to position the data that is returned by the user, into the active document at the correct location. You can add the SPDD bookmarks over existing text in your current documents to turn them into live data documents, all your text formatting such as font, size, italics etc will be preserved when the data is written to the bookmarks.

Concept:

The basic concept is designed around using Data Sets to store the details about the SharePoint site List, and Query Definitions to fetch the required data from those lists. Everything else such as the tables and document batches are based around these two structures.

Create many Query Definitions from a single Data Set. Create many Table Definitions, Batch Definitions, E-Shots and Composite Bookmarks from these query definitions.

Connecting to your SharePoint server:

Open the Data Doc Settings form and add the URL for your SharePoint site, removing the default.aspx, however leaving the "/" at the end of the URL. Example:

http://MySharePointDomain.com/Sites/SiteName/

Add your Username and Password as used when you connect to SharePoint with your browser. If you need to enter a Domain name for your site, do so here. Normally, if your user name is of the format username@domain.com you will not need to enter a domain, so leave this field blank.

Click the "Test Connection" button.

If the connection is successful click the "Save&Exit" button and you are ready to start adding data sets. If your connection test fails then check your details and retry until you get a Test Successful message. You are all ready to go.

Quick Start Guide:

- 1. Open "Add Data Sets" screen.
- 2. Add a new Data Set by entering a new name for your Data Set and selecting a list from those available on your server. Clicking the small refresh button to the right of the list drop down will update the list with the lists from your server. When you select the list in the drop down, the application automatically retrieves all of the selected lists field details from your server. Clicking the "Save Data Set" button will save your new set.
- 3. Now, by using the Data Set that you just created, you can create a new Query Definition. So, open the "Add Query Definitions" screen.
- 4. Add a new name for your Query Definition. Select the Data Set that you created from the dropdown. At this stage you can already run the query by clicking the "Preview Query" button, it will return all of the records from the list. You can add a where clause to your query by clicking the

"Click to Add Where Clause" button. When you are satisfied with the results you are returning save your Query Definition by clicking the "Save Query Definition" button.

 You can add data bookmarks to your document now. Click the "Place Data Bookmark" button on the ribbon. Select your Data Set from the drop down, which will list all of the available fields. Double clicking on any field will add the data bookmark for the field to your active document.



Data Bookmarks It will add the bookmark wherever you have the cursor in the document, it will also add a bookmark over a selection range in your document, which can make it easier to format the bookmark range in whichever way you like, i.e. Set font, size, color etc. When the data is written to the document during the fetch from SharePoint, this formatting is preserved.

6. To see if your bookmarks are running, click the "Refresh All Document Data" button on the ribbon.



D If there is only a single record returned then the application will automatically fill this to the active documents data bookmarks, otherwise you will see a screen allowing you to select the records that you want to use.

7. You can also create a Table Definition based on your Query Definition. Open the "Add Table Definitions" screen, select your Query Definition and select your columns, then save the new table definition. Now open the "Add Bookmark" screen and select the "Table Bookmarks" tab. Double click your table to add a bookmark for it to your active document. Click the "Refresh Doc Tables" on your ribbon and the application will go and get the required data from SharePoint and create a table based on this data in your active document where you placed the bookmark. The "Refresh All Document Data" button will also update the tables in the document.

How To:

Add a New Dataset:

Add\Edit Data Sets	Define Your Dataset
Available Data Sets Set Name List Name	Enter Name for this Set DSAnnouncements Select your Site List Announcements
	🚡 Delete Data Set 🛛 🗮 Save Data Set 🗮 Exit

Figure 1 – Add a new Data Set

Click "Add Data Sets" button on the ribbon to open the "Add Data Sets" screen.

Add a new Data Set by entering a new name for your Data Set and selecting a list from those available on your server. Clicking the small refresh button to the right of the list drop down will update the list with the lists from your server.

When you select the list in the drop down, the application automatically retrieves all of the selected lists field details from your server. Clicking the "Save Data Set" button will save your new set.

Advanced Field Settings:

Field	d Data	_					x
ID	Field Name		Display Name	Data Type	Format	Alias	•
0	ID		ID	Counter			=
1	ContentType	eld	Content Type ID	ContentTyp	oeld		
2	ContentType	е	Content Type	Computed			
3	Title		Title	Text	None		
4	Modified		Modified	DateTime	MM/dd/yyyy		
5	Created		Created	DateTime	MM/dd/yyyy		
6	Author		Created By	User			
7	Editor		Modified By	User			
8	_HasCopyD	estinations	Has Copy Destinations	Boolean			
9	_CopySourc	e	Copy Source	Text	None		
10	owshiddenv	ersion	owshiddenversion	Integer			-
٠ [•
A F	lias ormatting	MM/dd/yyyy None dd/MM/yyyy			Remove Field	Update Selecte	d

Figure 2 – Advanced Field Settings

Clicking on the "Open Advanced Field Settings" button from the data set screen opens the screen that allows you to specify the formatting or set an alias name for the field.

Change the default formatting on a Field:

Click the field that you want to change in the list of loaded fields. If you do not see a formatting options drop down when you select a field, it is because that field type does not have any formatting options available.

Click the Formatting drop down to display a list of options for that field's data type. Select the format that you require.

Clicking the "Update Selected" button will save your selections to the field.

Note: it is possible with date/time formatting to paste your own field formatting string into the drop down text area and save that. The application will attempt to apply the format you have specified.

Add an Alias to a Field:

Click the field that you want to change in the list of loaded fields.

Enter an Alias in the Alias text box and then click the "Update Selected" button to save the change.

Add a New Query Definition:

Add\Edit Query Definitions	Course & Red Lawrence		
SharePoint Data Doc			
		Define Your Query	
Available Query Definitions		Name Query Definition	QDef Announce Today
Query Definition	Dataset Name	Description	Return Announcements for today
test	test		
allquestions	test2	Colorad Cat Data Cat	
QDefAnnounce I oday	DSAnnouncements	Select List Data Set	DSAnnouncements -
		Preview Query	Click to Add Where Clause
		Where Created E	qual To 07/02/2012
		Order By Field	Title 🗸
			Ascending
		Overwrite Bookmark Name v	where no data for Field 🔽
		Number of Decode to Deter	
	- F	Number of Records to Return	
	De	elete Query Definition 🛛 🗮 Sa	ave Query Definition 🛛 🗮 Exit

Figure 3 – Add Query Definition

Give your new query definition a name and write a description to make it more easily identifiable. Select a Data Set on which to base the new query. At this stage you can click "Preview Query" and it will return all of the records from the SharePoint list specified in the data set.

Further refine your query by adding where clauses to filter your data, select an Order By Field and limit the records returned if you require. At any point clicking the "Preview Query" button will show you the results of your current specification.

When you are satisfied, click the "Save Query Definition" button.

Load Saved Query Definition:

Click on the item in the Available Query Definitions list to load that Query Definition. Make your changes and click the "Save Query Definition" button to save those changes.

Delete Saved Query Definition:

Click on the item in the Available Query Definitions list to load that Query Definition. Click the "Delete Query Definition" button to delete the saved copy of the selected query.

Add a New Table Definition:

*	Add\Edit Table Definitions	Day Date		
	SharePoint Data Doc		Define Your Table	
	Available Table Definitions		Name Table Definition	tblTest
	Table Definition Name tblTest	Query Def Name test	Description	A Test Table!
			Select Query Definition Table Style Table Font Size Available Columns Questionnaire Type Question Number Title Heading Question Question Type ChoiceOptions DronDowntems	test Table Columns 1 7 Selected Columns GuestionNumber Title Heading Question
	•	Þ	Add Field Names As Table Hea	Ider Reld Alias Where Applicable -
			Delete Table Definition	Save Table Definition

Figure 4 – Add Table Definition

Give your new Table Definition a name and write a description to make it more easily identifiable. Select a Query Definition on which to base the new table.

Select the fields from your Data Set that you want to use as columns in your new table. Double click the columns available to add them to the selected list. You can change the order of the columns by using the up and down arrow buttons.

Further refine your table by selecting a table style and font size and select "Add Field Names As Table Header" check box, if you want the table to be displayed with the names of the fields as the table header row. You can use the alias names for fields here by selecting "Use Field Alias Where Applicable" item in the drop down. In this way you can make the header row of the table display whatever is required.

Double Clicking on a selected column for your table will open a Change Column Properties screen which allows you to specify more precise details for your generated table allowing for more flexibility in its

🖳 Change Column Pro	perties		
Field	FirstName		
Font Size	0.00	Header	Detail
Fore Color		▼ ■ Header	Detail
Back Color		▼ ■ Header	Detail
Column Alias			
Column Width (cm)	0.00		
	Remove	🔀 Update	
	Remove	📝 Update	

creation.

You can specify a Font Size, Fore Colour, Back Shading, a Column Alias and also specify the width that each column should be in cm. Click the "Update" button to save your changes, click the "Remove" button to remove the column from those selected for the table.

When you are satisfied, click the "Save Table Definition" button.

Load Saved Table Definition:

Click on the item in the Available Table Definitions list to load that Table Definition. Make your changes and click the "Save Table Definition" button to save those changes.

Delete Saved Table Definition:

Click on the item in the Available Table Definitions list to load that Table Definition. Click the "Delete Table Definition" button to delete the saved copy of the selected table.

Create a Batch Document Definition:

Add\Edit Document Batches		
SharePoint Data Doc		Define Your Document Batch
Available Document Batches		Name Document Batch
Document Batch Name	Query Definition Name	Description
		Select Query Definition Select Field to Use as Document Name Enter a Name for the Created Documents "An Index will be appended to this name for each file created Select Template Select Output Folder Select Output Folder Exit

Figure 5 – Add Batch Document Definition

Give your new Batch Document Definition a name and write a description to make it more easily identifiable. Select a Query Definition on which to base the new Batch Document. For each list item (or row of data) returned by the query a new batch document will be created and filled with that items data.

Any Table Definitions that have been added to the document template will be generated separately using their own query definitions as the source. Thus you can have tables of details in a batch document from many different source lists.

Either select a field in your data set to use as the basis for the created documents name, or enter a string to use in the text box provided. In either case the number of the document in the batch is appended to this document name when each document is actually saved on creation. This ensures that the name of each document created is different from the others in the same batch.

Select a template to use when creating the new documents of this batch run. Create your template by using the "Add Bookmark" screen, to add data bookmarks for both data set fields and tables that you have created. Save your template to a location that can be accessed by all your users.

Select the Output Folder for your created documents. This is where the documents from the batch run will be saved to when they are created.

Load Batch Document Definition:

Click on the item in the Available Document Batches list to load that Document Batch Definition. Make your changes and click the "Save Document Batch" button to save those changes.

SharePoint Data Doc Professional User Guide

Delete Batch Document Definition:

Click on the item in the Available Document Batches list to load that Document Batch Definition. Click the "Delete Document Batch" button to delete the saved copy of the selected batch.

Place Data Bookmarks into your document:



Figure 6 – Add SharePoint Data Doc Bookmarks

Clicking on the "Place Data Bookmarks" button on the SharePoint Data Doc ribbon opens the screen which allows you to add SharePoint data bookmarks into your active document.

There are four tabs available, allowing you to place the Query Definition, Data Set, Table Definition and Composite Bookmark SPDD object bookmarks into your active document.

Double clicking any of the list items in each tab will add the selected object into the active document at the position in the document that has the active selection, i.e. The place that you have positioned your cursor.

If you wish to create your documents completely from online SharePoint data say, then you may wish to select (highlight) a range in your document and add the bookmark over the entire range. Any formatting within the range will be used to format how the data that is returned looks in the document, so font, color, size etc. will remain the same.

Fetch SharePoint Data:

	Fetch SharePoint Data									
	SharePoint Data Doc									
5	elect the Query you wish to	<u>o Run</u>								
	Query Definition Name	Effected Dataset Name								
	test	DSAnnouncements								
	Create New Query									
		🥵 Fetch Data								

Figure 7 – Fetch SharePoint Data

Click the "Fetch SharePoint Data" button on the SharePoint Data Doc ribbon to open the screen which allows you to actually return data from SharePoint to your document.

Select the query for which you want to return SharePoint data, or alternatively create a new one.

Clicking the "Fetch Data" button will access your SharePoint site and retrieve the relevant data.

If only a single list item is returned by your query then any data bookmarks are automatically filled with any relevant data. If there are more than one list items returned then you can select between the rows by double clicking on the display list of returned list items.

Run a Batch document:

Select a Preset Batch and Run it	
SharePoint Data Doc	
Available Document Batches	Batch Description Image: Constraint of the second secon

Figure 8 – Run a batch of Documents

Select the required batch from the Available Document Batches list.

Click the "Run Selected Batch" button to start the batch run.

By selecting the "Open Destination Folder..." button the folder containing the created documents will open at the end of the process.

Default Field Formats:

💼 Specify Defau	It Options	Without Instanting Lange days		x				
SharePoint Data Doc								
Application Def	ault Formatting Imp	ort Template settings XML						
Field D	efault Formatting							
	Text	None	•					
	Number	Round to Whole number	•					
	Currency	Round to 2 Decimal Places	•					
	Date/Time	MM/dd/yyyy	-					
Table [Default Formatting							
	Table Style	Table Colorful 1	•					
	Table Font Size	7						
		🔜 Save & Exit	Ex Ex	it				

Figure 9 – Specify Default Options

By selecting the "Default Options" from the ribbon you will open the options screen for SharePoint Data Doc.

A number of application defaults are specified here which can be changed to alter how the application runs. The default field formats are applied to each field when creating a new data set from a SharePoint list, each field being assigned the default formatting for its type when loaded from the server.

With regards to the Date/Time formatting, it is possible to paste your own format string into this drop down and the application will attempt to apply it.

You can also set the default settings for Table Style and Table Font Size.

The "Import Template Settings XML" tab in the options screen allows you to import Data Sets, Query Definitions and Batch Definitions from another XML file. So when your document administrator creates new template documents, he/she need only email you the XML file they have created and once you import it, then you have access to all of the new content.



Note: The XML file created by your application is stored in the user's documents directory:

- XML Location: C:\Users\{UserName}\Documents\DataDoc\
- XML Filename: SPDDProXMLStore.xml

Refresh the tables of your active document:

Click the "Refresh Doc Tables" button on the SharePoint Data Doc ribbon to refresh the tables in your currently active document, or to create tables for table bookmarks that you have just added.

Release Note Inclusions - How to Use New Functionality

Version 1.4.0.1 - Field Format Use

- You can now set an individual field format for Number fields that display a percentage value. Click "Open Advanced Field Settings" on the Data Sets screen and select a Number field, then select 'Percentage' from the *Formatting* drop down. Click *Update Selected*, close the screen and Save your Data Set. This field will now display correctly as say 21.5%, rather than the 0.215 as is stored on SharePoint lists.
- You can now output a batch run into a single document containing the details of all iterations of the batch template. So instead of 9 documents for 9 SharePoint list items in a query, all 9 documents details are output to a single document contiguously with a page break between each list item. Select the *Create As Single Output Document* check in the *Add Batch Documents* screen.

Version 1.5.0.6 - Refresh All Data Use

New Features Added:

• Single click refresh of all document data, both table and standard data bookmarks. So, now your users need only press a single button to refresh all of their SharePoint data. This can include any number of different Table Definitions along with data from any number of separate Query Definitions within the same document. All queries will be run sequentially and the live SP data added to the document.



- To facilitate the single click refresh a new bookmark type, Query Bookmarks, have now been added. These are specific to a particular query rather than a dataset. You can now have bookmarks from any number of different queries in the same document and they will fill sequentially when the *Refresh All Document Data* button is clicked. It is now possible to automate the entire cycle of document creation, utilising workflows to create documents on the server containing Server Managed Document Properties specific to your purposes (such as an EmployeeID field), the value of which can in turn be used within Where Clauses of Query definitions to provide individualised and automatically generated documents for each user.
- Forms Based Authentication (FBA) has now been added for all those using this security setting.

Version 1.5.0.11 – Hide/Show Field Use

New Features Added:

Added the ability to specify whether to Show or Hide a particular field from the SharePoint list for which you are creating a Dataset. Open the *Advanced Field Settings* screen when creating or editing a Dataset, select the Field from the list of those available, Check or Uncheck the **Show Field** option and then click the **Update Selected** button to confirm the change. This setting will then automatically filter down to all screens that display field data, such as field drop downs, available table columns and multiple return record display screens providing a more user friendly interface.
 Field Data

D	Show	Field Name	Display Name	Data Type	Format	Ali
1	False	ContentTypeId	Content Type ID	ContentTypeId		
2	True	Title	Last Name	Text	None	
3	False	_ModerationComments	Approver Comments	Note		
4	False	File_x0020_Type	File Type	Text	None	
5	False	LastNamePhonetic	Last Name Phonetic	Text	None	
6	True	FirstName	First Name	Text	None	
7	False	FirstNamePhonetic	First Name Phonetic	Text	None	
3	True	FullName	Full Name	Text	None	
9	True	Email	E-mail Address	Text	None	
10	True	Company	Company	Text	None	
11	False	CompanyPhonetic	Company Phonetic	Text	None	
1						
_						
Δ	lias					
F	ormatting	None	▼			
_		-				
S	how Field	v		💾 Remove Fi	eld 📝 Upo	date Select
					d Field Cettings	
				Open Advance	a riela settings	

Version 1.6.0.1 - E-Shot Use

New Features Added:

• You can now not only automatically generate various document types straight from your SharePoint list meta data but you can then automatically attach and send them in an email by selecting a SharePoint field from which to source the To email address.

Step 1: Specify your SMTP host and SMTP port in the Default Options screen, then Save your changes.

-1	Specify Default Options	-	dana basil	2000	_ 0	X
	SharePoint Data Do	C				
	Application Default Formatting	Import T	emplate settings XML	Email Settings		
	Email Setup Details					
	SMTP Host		mail.bigpond.com			
	SMTP Port		25			
	From Email /	Address	info@dcsoftwaresolut	ions.com		
L						

Step 2: In Add\Edit Batch documents, Select the Email Document as Attachment checkbox as below. *Select Email Address Field* from the available fields in the dropdown that you want to use to supply the email address to send to. The list contains all of the fields from your underlying Query Definition.

SharePoint Data Doc Professional User Guide

Add Where Clause to U	Jnderlyir	ng Tables Based on Batch Que	У
Select Output Folder	Save	As Format .docx	•
C:\Users\Blah\Desktop			
Email Document as A	ttachmei	nt Email	
Select Email Address F	reid	Email	•
		🙊 Edit Email Details	

Step 3: Then Click the Edit Email Details button to add a subject and body to your mail...

Í	💌 Email D	etails		
	🤹 🔊	harePoint Data Doc		est Hidde
	Enter the	details for your Batch E	nail	ument N
l	Subject	Test Batch Subject 2		Documer
l	Body	Dear (FullName)		this nar
l		Dear (ruinvaine),		ument
l		Your Details: Company: {Company}		nt By
l		Job Title: {Job Title}		
l		Title: {Title}		
l				ddenBate
l		Please Find attached docu	mentation for your perusa	l
l		Best Regards,		ying Tab
l		Declan Colman		
l				ve As Fc
			Rave & E	xit
1			y cmair bocoment	as Anacament
			Select Email Addre	ess Field Em

You can right click in the body section and insert a placeholder, {FieldName}, for fields in the underlying batch query. These placeholders will be replaced by the data from the specified field in the current list item being processed. So, the emails are individualised for each recipient.

Click Save & Exit on this screen and then remember to Save your Batch Document changes too.

20

Step 5: Select *Run Batch Documents* from the SPDD ribbon to run your batch.

Version 1.7.0.5 - Table Column Options and Batch Update Query Use

New Features Added:

• More flexibility for Table Creation with the addition of more Column options. Double click the column in the Selected Column list of the Table Definition to bring up the column properties dialog:

(🔡 Change Column Prop	perties			
	Field Font Size Fore Color Back Color Column Alias Column Width (cm)	Rate 6.00 ↓ Red ↓ 2.00 ↓	Header Header	 Detail Detail Detail Detail 	
	Ti Li D Ite U R In	Remove	Vpdate	Item_x0020_Description Rate Units ItemTotal	

As it stands you can set font size/fore colour and back shading and select it for either header or detail. You can also add a Column alias and width in cm. I will be expanding on these options in coming days and weeks to include format overrides per column, alignment and more. If anyone wants anything specific added be sure to let me know ⁽ⁱ⁾

It can create tables such as the following in super quick time and to change them around is a snap too:

SharePoint Data Doc Professional User Guide

Date	Item Description	Rate	Units	TEM TOTAL
2013-03-09 16:00:00	Profess aggleration for actional integrity	\$55	3	\$165
2013-03-09 16:00:00	And the second s	\$125	3	\$375
2013-03-09 16:00:00	· Bendere application for software temperatu	\$55	3	\$165
2013-03-10 03:00:00	Review application for subweat longing	\$55	3	\$165
2013-03-10 03:00:00	Anticine grapping with the same completion	\$125	3	\$375
2013-03-12 03:00:00	taninin tarang dipanan papa	\$150	12	\$1800
2013-03-12 03:00:00	Encloses for each in post- of proposed property	\$725	3	\$2175
2013-03-12	France constitution provides provides	\$200	6	\$1200

Added the ability to carry out a batch update to a SharePoint list (!), this is very powerful functionality that is usually not available without coding.
 So, it is located within the Table Definitions screen and allows you to update field in all of the SharePoint list items returned for the table query. You can select a Server Managed Document property from which to source the update value, or you can enter a literal value to update, while also selecting the field that you wish to update. Remember that if it is a Yes/No field then you must use 1's and 0's as your update values.

Note: In order to select the document in The active docur	server managed d question open as y nent is scanned for	locument properties you need to have your active document in word. • available properties.
Select Query Field	[▼
Select Document Prope	rty Value	•
Literal Value Update	[
Assigned Update Lines	<u>1</u>	Add Update Line To List
Query Field	Update Value	From Document Property Literal Value
		Save Update Specification
Click	To Add Query Up	dating From Document Properties Values

Once you have created the Update Query you can run it by refreshing the table in your document from the Ribbon and then select the Save with Update button from the Ribbon, which will execute the query.

uttons		
les	Save Document With	
	SharePoint Update	
	Save Document	

All your SP list items for the fields and values specified will be updated in one query!

Miscellaneous

Where to Store your SPDD template documents?

Store your template documents on SharePoint in a doc library, that way you can control your users' document content centrally.

When creating a batch run in the Add Batch Document area, you will then need to click Select Template, and navigate to your document library (you can navigate to URL's in here too) and select the document you want to use as a template (i.e., the one you put the field bookmarks and table definition bookmarks into).

How the Batch Works

Select a query you have created to base your batch on. So, the Batch will take the document you specify as a template and for each row of data returned by the query it will produce 1 document, each document using the correct Rows data (i.e. 1st doc gets row 1 data, 2nd document gets row 2 data etc...). So, if the query returns 10 list items or rows then it will create and save 10 documents. The tables are handled separately, and will generate the same as each other in every document. You can add as many different tables as you want to.

Therefore if you create a query to base the document on, that returns only 1 list item to fill your document (build with the query builder), then the batch will produce 1 fully filled document.

Groups of Batches

A new feature just added allows you to specify a Group of Batches. So now you will be able to achieve refreshing all your documents in one fell swoop. You can now set up Groups of those Batches and they will be sequentially created. So if you had 4 batches set up, each with

a different template (loaded from SharePoint doc lib) and on queries returning 1 item (plus the tables) then you would get 4 different documents, each filled in with live data and tables.

Details of XML Settings file

This file is the only thing you should need to send to your users.

All of the details that you save, so Log in details, Data Sets, Query definitions, table definitions, batches etc. are all stored in the **SPDDProXMLStore.xml** XML file, which is located in your **C:\Users\{UserName}\Documents\DataDoc**\ directory. The idea is that you give this XML file to your users and then they have all the same SPDD object that you created. So, if you have created a batch on your machine, give them the XML file, then all they have to do is to run the batch and the app will do the rest for them in terms of creating the documents.

The most straightforward way for users to update their details with new Query and Table definitions from you (the Administrator) is for you to send the xml file to them (or download from your Doc Lib), and for them to Import it using the Import functionality in the Options screen. Either that or just give them the already created (by you) xml file when they get the software.

Once the users have imported the XML file that you created, then the primary thing to be careful of is that the paths to the template documents are correct.

If you have created a Batch job for the user to run, then it is important that you ensure the relative paths to the template are the same for both of you (i.e. the same network share or the same explicit path, for example "C:\YourDocs\Document1.docx"), or inform them how to change the path to the document in the batch screen if this is not possible.

Ideally you should base your SPDD templates in a Document Library of your SharePoint Site, which eliminates the problem of incorrect paths to templates completely

If you do set up your templates in your SharePoint document library then you should also suggest that your users to make the following change to their local Internet settings:

- 1) In Internet Explorer, click Tools and the click Internet Options.
- 2) In the Internet Options window, switch to Security tab, click "Trusted sites" and click Sites.
- 3) Add the URL of this site and your domain name and close the "Trusted sites" window.
- 4) Go back to Internet Options, select "Trusted sites" and click "Custom Level".
- 5) In the new-opened window, under "User Authentication Logon", please select "Automatic logon with current user name and password" and click OK to apply this setting.
- 6) Then click OK to apply all the settings and close Internet Explorer.

If this is not done then the only difficulty it causes to the Add In is that it will stop processing to ask the user for a login when accessing the document library for a template.

Appendix I: Table Formats

SharePoint Data Doc offers a number of pre-defined table formats that you can apply to your SharePoint data as it is rendered in Word 2010. These are as follows:

Table - Normal

	y# 1 · · · I · ∃	<u># 2···</u> 1	· # 3 · · ·	1 표 ・ 4 ・・・・	1 雎 ・ 5 ・・・・1	亜 ・ ・ 6 ・ ・ ・	<u>#· · · / · ·</u>
InvoiceID1¤	ltem_x0020_ Description¤	Rate¤	Per¤	Units¤	ltemTotal¤	Invoiced_x00 3f_¤	Ħ
Ħ	Review- application for-cultural- integrity¤	\$55¤	Hour¤	3¤	\$165¤	False¤	Ħ
Ħ	Refview [.] proposed. work-for-code. compliance¤	\$125¤	Hour¤	3¤	\$375¤	False¤	Ħ
Ħ	Examine-Eco- biology-of- proposed- project¤	\$150¤	Hour¤	12¤	\$1800¤	False¤	Ħ

Table - 3D effects 1

InvoiceID1¤	Description¤	Rate¤	Per¤	Units¤	ltem lotal¤	3f_¤	¤
¤	Review- application- for-cultural- integrity¤	\$55¤	Hour¤	3¤	\$165¤	False¤	Ħ
Ħ	Refview: proposed: work:for:code: compliance¤	\$125¤	Hour¤	3¤	\$375¤	False¤	¤
Ħ	Examine-Eco- biology-of- proposed- project¤	\$150¤	Hour¤	12¤	\$1800¤	False¤	¤
Ħ	Evaluate- forestry- impacts-of- proposed-	\$725¤	Day¤	3¤	\$2175¤	False¤	¤

Table - 3D effects 2

nvoiceID1#	Item x0020	Ratex	Pert	Unitst	ItemTotalø	Invoiced x00	н
,	Description¤					3f_¤	ſ
¤	Review- application- for-cultural- integrity¤	\$55¤	Hour¤	3¤	\$165¤	False¤	×
Ħ	Refxiew: proposed: work-for-code: compliance¤	\$125¤	Hour¤	3¤	\$375¤	False¤	¤
ğ	Examine-Eco- biology-of- proposed- project¤	\$150¤	Hour¤	12¤	\$1800¤	False¤	¤
¤	Evaluate forestry	\$725¤	Day¤	3¤	\$2175¤	False¤	¤

Table - 3D effects 3

InvoiceID1	Item Description	Rate	Per	Units	Item Total	Invoiced?
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	<u>Refview</u> proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco-biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False
	Review submitted construction plans and report	\$200	Hour	6	\$1200	False
	Revciew foresatry impacts for project and report	\$175	Hour	5	\$875	False
	Review submission for initial qualification	\$55	Hour	3	\$165	False
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refview proposed work for code compliance	\$125	Hour	3	\$375	False
	Review application for cultural integrity	\$55	Hour	3	\$165	False

Table Classic 1

InvoiceID1	ltem_x0020_ Description	Rate	Per	Units	<u>ItemTotal</u>	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	<u>Refview</u> proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed	\$725	Day	3	\$2175	False

Table Classic 2

nvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refxiew proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed	\$725	Day	3	\$2175	False

Table Classic 3

InvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3f_	
	Review application for cultural integrity	\$55	Hour	3	\$165	False	
	Refview proposed work for code compliance	\$125	Hour	3	\$375	False	
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False	
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False	

Table Classic 4

Invoice(D1	item_x0020_ Description	Rote	Per	Units	<u>itemTotal</u>	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	<u>Refxiew</u> proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False

28

Table – Colorful 1



Table – Colorful 2

InvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3 <u>f_</u>
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refixiew proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed	\$725	Day	3	\$2175	False

Table – Colorful 3



Table – Columns 1

InvoiceID1	Item_x0020_ Description	Rate	Per	Units	ltemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refview proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$ 1 50	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False

Table – Columns 2

nvoiceID1	ltem_x0020_	Rate	Per	Units	ItemTotal	Invoiced_x00
•	Description					3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refview proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$217 5	False

Table – Columns 3

InvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3f_	
	Review application for cultural integrity	\$55	Hour	3	\$165	False	
	Refview proposed work for code compliance	\$125	Hour	3	\$375	False	
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False	
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False	

Table – Columns 4

InvoiceID1	ltem_x0020_ Description	Rate	Per	Units	ltemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refxiew proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed	\$725	Day	3	\$2175	False

Table – Columns 5

·		1				
InvoiceID1	Item_x0020_	Rate	Per	Units	ItemTotal	Invoiced_x00
	Description					3/_
	Review	\$55	Hour	3	\$165	False
	application					
	for cultural					
	integrity					
	Refview	\$125	Hour	3	\$375	False
	proposed			-	ţ	
	work for code					
	compliance					
	Evening For					
	Examine Eco-	\$150	Hour	12	\$1800	False
	biology of					
	proposed					
	project					
	Evaluate	\$725	Day	3	\$2175	False
	forestry					
	impacts of					
	proposed					
	project					

32

Inv	oiceID1	Item x0020	Rate	Per	Units	ItemTotal	Invoiced x00
		Description					3f
		Review	\$55	Hour	3	\$165	False
		application					
		for cultural					
		integrity					
		Refview	\$125	Hour	3	\$375	False
		proposed					
		work for code					
		compliance					
		Examine Eco-	\$150	Hour	12	\$1800	False
		biology of					
		proposed					
		project					
		Evaluate	\$725	Day	3	\$2175	False
		forestry					
		impacts of					
		proposed					
			1				

	_				_	
InvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refxiew proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False



InvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refxiew proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False

InvoiceID1	Item_x0020_ Description	Rate	Per	Units	itemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refxiew proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False

nvoiceID1	ltem_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refview proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False

InvoiceID1	Item_x0020_ Description	Rate	Per	Units	<u>ItemTotal</u>	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refxiew proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False

InvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refview proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False

InvoiceID1	ltem_x0020_	Rate	Per	Units	ItemTotal	Invoiced_x00
	Description					3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refview proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False



nvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refview proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False

Table – List 1

InvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTatal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refview proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False





Table – List 3

InvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refxiew proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed	\$725	Day	3	\$2175	False





Table – List 5

InvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refxiew proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False



InvoiceID1	Item_x0020_ Description	Rate	Per	Units	<u>ItemTotal</u>	Invoiced_x00 3f_	
	Review application for cultural integrity	\$55	Hour	3	\$165	False	
	Refview proposed work for code compliance	\$125	Hour	3	\$375	False	
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False	
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False	

Table – List 7

InvoiceID1	Item_x0020_ Description	Rate	Per	Units	ItemTotal	Invoiced_x00 3f_
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refyiew proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False

Table – List 8

nvoiceID1	Item x0020	Rate	Per	Units	ItemTotal	Invoiced x00
	Description					3 <u>f_</u>
	Review application for cultural integrity	\$55	Hour	3	\$165	False
	Refixiew, proposed work for code compliance	\$125	Hour	3	\$375	False
	Examine Eco- biology of proposed project	\$150	Hour	12	\$1800	False
	Evaluate forestry impacts of proposed project	\$725	Day	3	\$2175	False