KeyDocs – PDF Designer

*Mike Liggera*

KEYSTONE
Information Systems

Overview

➤ KeyDocs uses a third-party toolkit to create formatted, merged PDF documents from your Keystone system.

➤ This toolkit uses XML files as the document templates, which include merge fields to pull data from the Keystone software

➤ This also includes a graphical editing tool ("PDF / Page Designer") to create and maintain the XML files.

➤ In KeyDocs, you can do the following with the merged PDF files:

- ➤ *Preview* them in Adobe Reader
- ➤ *Email* them to others
- ➤ *Save* them within Keystone (to an employee/vendor/taxpayer record), allowing them to be viewed within Keystone Client or online
- ➤ Apply *electronic signatures* (currently available for employee letters and employee contracts)
- ➤ Add *password* protection (for checks)

Download the PDF Designer software

➢Get the software:

 ➢Download the file from the Client Care Portal:

  ➢*Located in: User Manuals → KeyDocs*

 ➢Save it to your desktop or somewhere else you can find it easily

➢Locate the shared "Templates" folder on your server:

 ➢Local path is under UVDATA (UVDATA\<company_name>\COMDATA\Templates)

Opening existing Templates

➢ Run the PDFDesigner software, then click "File->Open" or click this icon (highlighted):
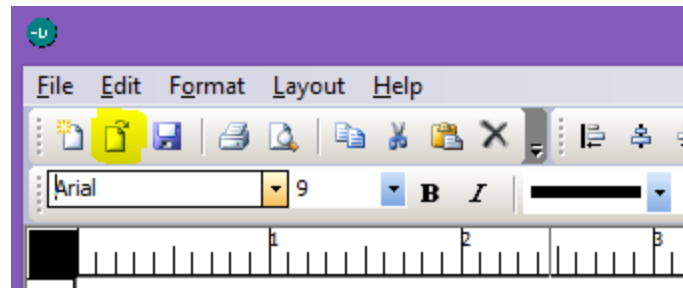
➢ *PRO TIP: Always make a backup of the template before editing it, so you don't "break" an existing template!*

➢ *Additional notes:*

  ➢ *There is no "undo" button in the Designer*

  ➢ *All measurements are in millimeters*

PDF Designer – Text / Image toolbar

Add text box – Same as label, but it has a black border, and it is not transparent.

Add image – Click this button, then drag on the screen where you want this to go. See the next slide for tips on adjusting images.

Add label – best choice for adding text to your document – the border and the background are pre-set to be clear/transparent.

**Add various shapes** – Similar to the text box, you can insert text in these as well

Additional shapes – You can draw horizontal/vertical lines and barcodes.

KEYSTONE
Information Systems

PDF Designer – Tips for capturing images

➤ Use the "Snip & Sketch" tool to capture images from your screen (Windows key + Shift + S):
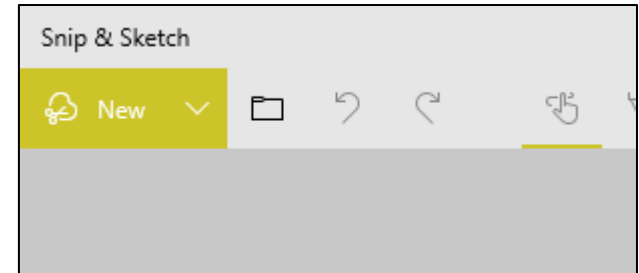
➤ For signatures, the "photocopy" option in Word works well to clean those up:
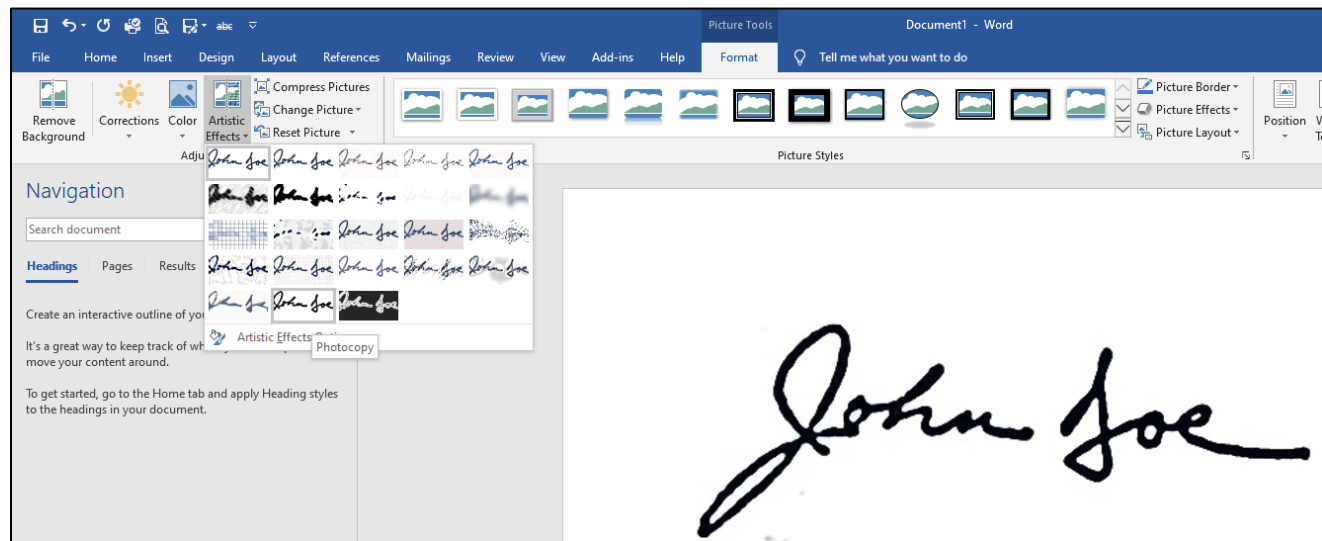
PDF Designer – Inserting images

➢ Click the "Add Image" icon, then click and drag a rectangle in white space on the form. Select the image to add directly from your computer.

➢ To edit, right-click the image and click "Position"

➢ To cover a full page, use these settings:
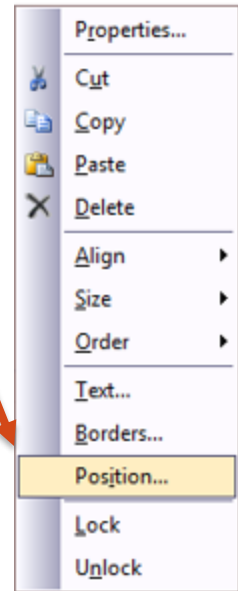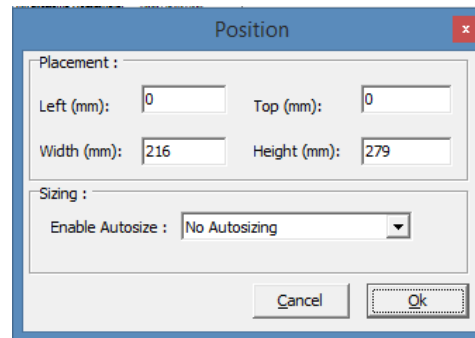
➢ *Convert inches to millimeters … 8.5 x 11 in = **216 x 279 mm***

➢ To ensure the image goes BEHIND your text, click this icon:

Step-by-step process to create a new KeyDoc (overview)

1. Create a new template with merge fields.

2. Save it on the shared "Templates" folder on the server.

3. Use the *KeyDocs* **Mail Merge Setup** screen (KC0099) to link your template to Keystone

4. Run the associated program to test your changes

PDF Designer – Adding Merge Fields

➢ Inline with your static text, simply surround the field name with hashtags. For example:

  ➢ **#FULL-NAME#**

➢ To add page numbers:

  ➢ **#=SHEET#** ← This is the current page for a single record. So, for example, if you print 10 three-page documents, it will count 1, 2, 3, 1, 2, 3, etc.

➢ ***Important:*** *You are limited to 12 field names per object. If you need more fields on a given page, simply create a new label / text box.*

PDF Designer – Font Style

➢ Typically, you can only apply one font and style (color/bold/underline/size) to each text box.

➢ If you want to have mixed styles, right-click on your text box, select "Properties," and check the "HTML Markup" box. You will then use basic HTML commands to change your font style – see examples on the next slide

➢ Examples:

➢ bold

➢ <i>italics</i>

➢ <u>underline</u>
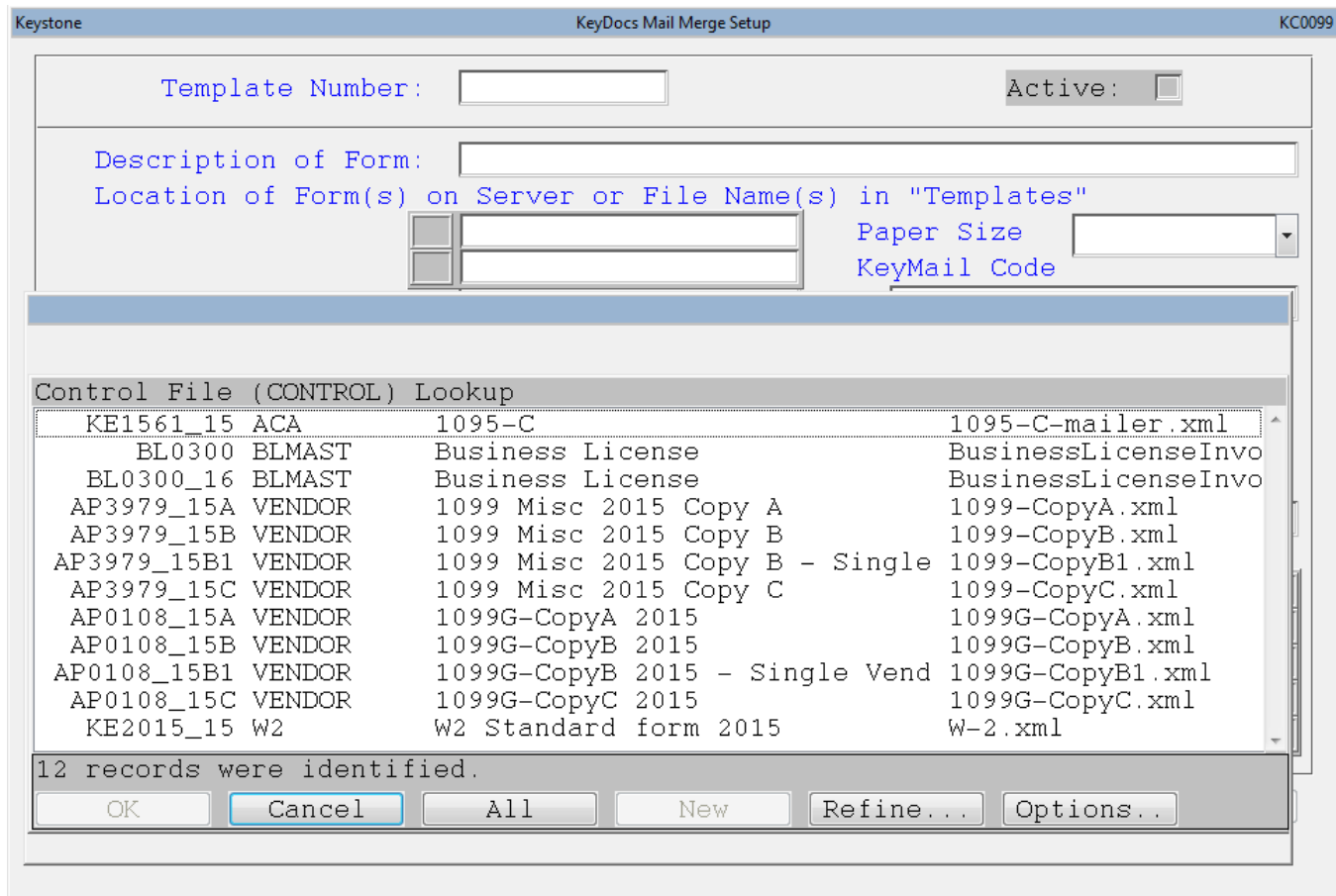
➢
carriage return
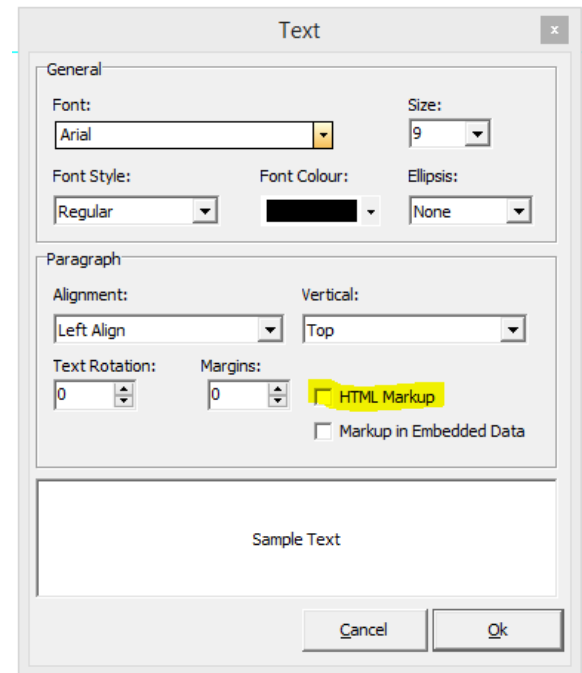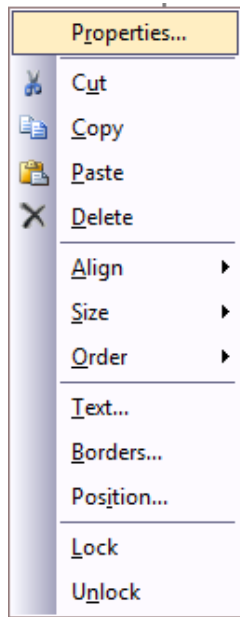
PDF Designer – Font Style (examples)

b	*Bold Face*
i	*Italic*
u	*Underline*
font-family or ff	*Font face*
font-size or fs	*font size in points (whole)*
font-color or fc	*Font color in hex notation*
font-weight	*bold or normal*
br	*line break*
p	*paragraph break*
h2-h4	*headers*
span	*marks a span of text*
pre	*preformatted text*
align	*left, right or center*

EXAMPLE:
BOLD<h3>Document Comments</h3> #COMMENTS#

Define Templates

➢ Once you have designed your template you need to "tie" it in to Keystone through the **KeyDocs Mail Merge Setup** screen (KC0099 / *General System Administration→General System Parameters*):

Define Templates (cont'd)

➢ If you are connecting your template with a Keystone program (like KE0882 / Create Merged Files for Contracts), then the 'key' for the template number must follow a specific format:

[Customer ID]_Screen Name_[Year][Additional ID]

➢ For example, "CENTER_KE0882_1785" refers to the following:

- ➢ **Customer ID = Center.** Since this is defined with a customer ID, this is custom, and will never be overwritten by a software update.
- ➢ **Screen Name = KE0882.** This template is called by this screen (Create Merged Employee Contracts). It is always required.
- ➢ **Year = 17.** Include only the last two digits. In this example, records for FY2017 would be included. This allows you to create different templates for each year.
- ➢ **Additional ID = 85.** Depends on the screen calling this template. In this example, the template will be used for Contract Type 85.

Run your Merge

➢ When you are satisfied with your results, check the "Save Document in Attachment Cabinet" button to save the document in Keystone:

List of fields associated with certain processes

➢ We have documented the fields available for merging with a few of Keystone's standard processes. Go to *Client Care Portal → User Manuals → KeyDocs:*

AP Checks - data fields (in progress)

Contracts - data fields

PR Checks - data fields (in progress)

Purchase Orders - data fields