



KeyDocs – PDF Designer

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KEYSTONE
Information Systems

Overview

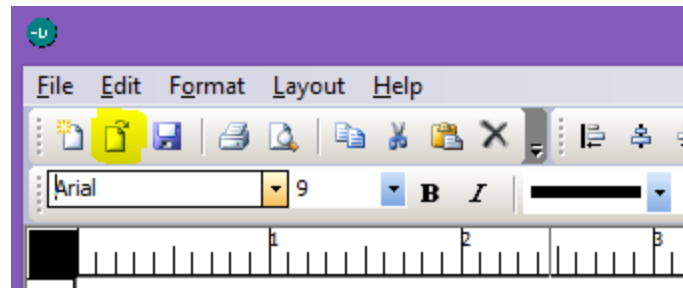
- KeyDocs uses a third-party toolkit to create formatted, merged PDF documents from your Keystone system.
- This toolkit uses XML files as the document templates, which include merge fields to pull data from the Keystone software
- This also includes a graphical editing tool (“PDF / Page Designer”) to 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.



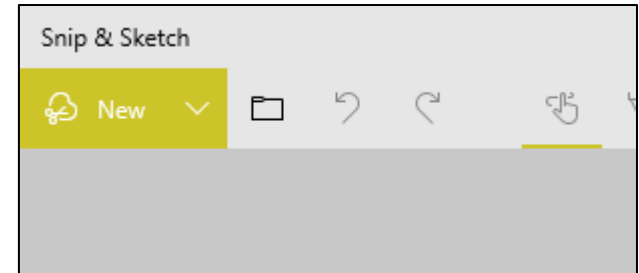
Add label – best choice for adding text to your document – the border and the background are pre-set to be clear/transparent.

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

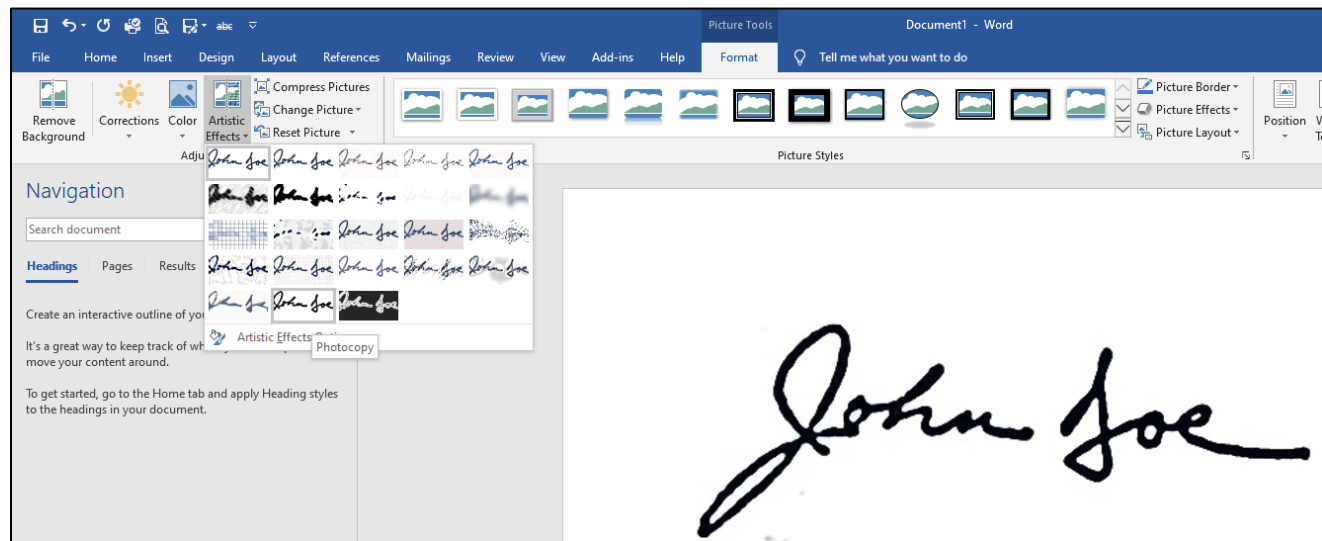
Additional shapes – You can draw horizontal/vertical lines and barcodes.

PDF Designer – Tips for capturing images

- Use the “Snip & Sketch” tool to capture images from your screen (Windows key + Shift + S):

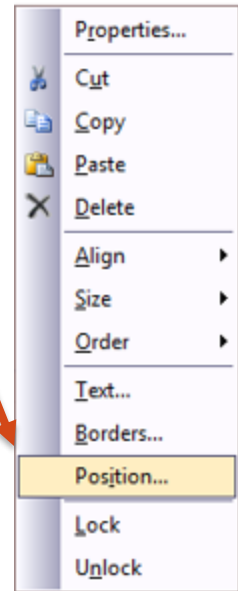
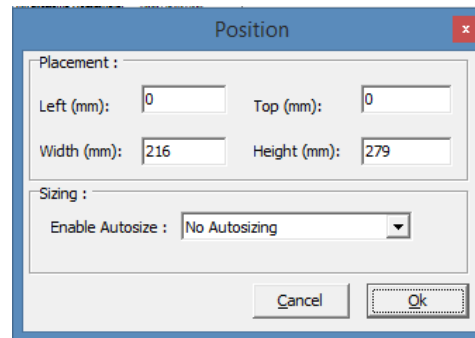


- For signatures, the “photocopy” option in Word works well to clean those up:



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

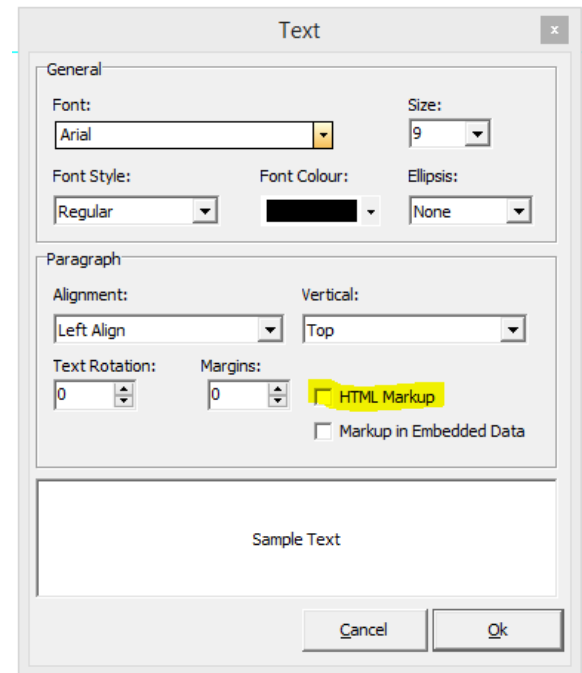
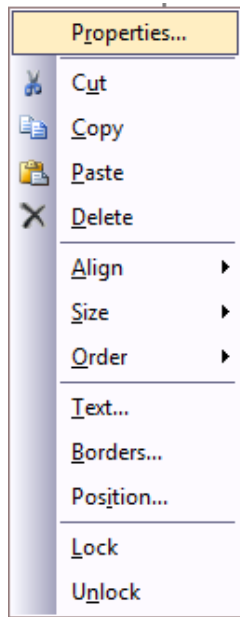
PDF Designer – Adding Merge Fields

- 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)

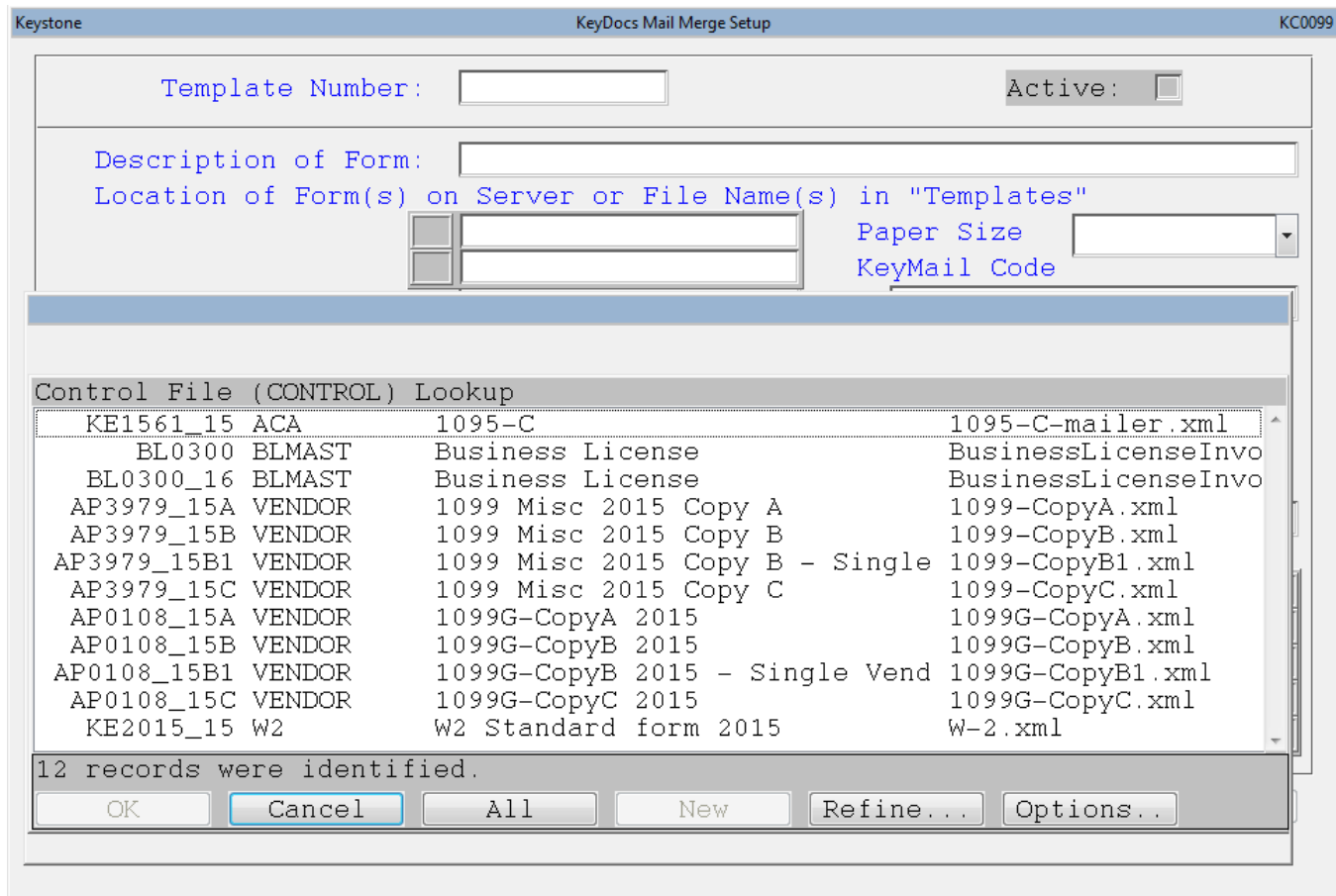
b	<i>Bold Face</i>
i	<i>Italic</i>
u	<i>Underline</i>
font-family or ff	<i>Font face</i>
font-size or fs	<i>font size in points (whole)</i>
font-color or fc	<i>Font color in hex notation</i>
font-weight	<i>bold or normal</i>
br	<i>line break</i>
p	<i>paragraph break</i>
h2-h4	<i>headers</i>
span	<i>marks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

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*):



Keystone KeyDocs Mail Merge Setup KC0099

Template Number: Active: ☐

Description of Form:

Location of Form(s) on Server or File Name(s) in "Templates":

Paper Size

KeyMail Code

Control File (CONTROL) Lookup

KE1561_15	ACA	1095-C	1095-C-mailer.xml
BL0300	BLMAST	Business License	BusinessLicenseInvo
BL0300_16	BLMAST	Business License	BusinessLicenseInvo
AP3979_15A	VENDOR	1099 Misc 2015 Copy A	1099-CopyA.xml
AP3979_15B	VENDOR	1099 Misc 2015 Copy B	1099-CopyB.xml
AP3979_15B1	VENDOR	1099 Misc 2015 Copy B - Single	1099-CopyB1.xml
AP3979_15C	VENDOR	1099 Misc 2015 Copy C	1099-CopyC.xml
AP0108_15A	VENDOR	1099G-CopyA 2015	1099G-CopyA.xml
AP0108_15B	VENDOR	1099G-CopyB 2015	1099G-CopyB.xml
AP0108_15B1	VENDOR	1099G-CopyB 2015 - Single Vend	1099G-CopyB1.xml
AP0108_15C	VENDOR	1099G-CopyC 2015	1099G-CopyC.xml
KE2015_15	W2	W2 Standard form 2015	W-2.xml

12 records were identified.

OK Cancel All New Refine... Options...

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:

The screenshot shows a dialog box titled "Create New KeyDocs Document" with a "Keystone" title bar and a "KC0101" identifier. The dialog is divided into two main sections. The left section contains the following fields and options: "Form Name:" with the text "Annual Contract - Professional"; "Output Option:" with three radio buttons labeled "Preview" (selected), "Print", and "No Output"; "Printer:" with an empty text box; "Email Document as an Attachment:" with an unchecked checkbox; "Save Document in Attachment Cabinet:" with an unchecked checkbox; and "Filename:" with the text "ProfContract". The right section, titled "Copy (if applicable)", contains three radio buttons labeled "Preview", "Print", and "No Output", all of which are unselected, and two checkboxes labeled "Email Copy:" and "Save Copy:", both of which are unchecked. At the bottom right of the dialog are "OK" and "Cancel" buttons.

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