

# User Guide KSL Interactive Document

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## 1. Interactive document

The interactive document aims to give the user the control on a composite and variabilized document.

The update of the document can be light: the choice of an alternative or the addition of a personalized formula on a body of mail, or more consequent on contracts of several pages, until the almost complete construction of one document per assembly of existing bricks.

If the interactive document is accessible via the Ksl Office platform, its launch can also be integrated into a business application via the LaunchKid web service.

### 1.1. The customizable components

Customizable content concerns two components, the textzone and the group, which have singularities.

#### a. The textzone, customizing content

On the interactive document, the text box allows

- content modification
- logical or physical suppression.
- alternative text boxes, customizable or not

Access to the customization of a textzone obeys the combination of several rules:

- the textzone is checked editable and / or deleteable on the model Ksl Studio (properties of the textzone)
- alternatives are defined in Ksl Studio for this textzone (properties)
- the user must have editing rights on preview (Ksl Admin)
- if it is shareable, it can be "to personalize"; check box in the Ksl Office repository properties. This option insists on the need to update its contents on the current document.

#### b. The groupe, customizing document structure and content

On the interactive document, the group authorizes

- content customization, which means that all or some of the text boxes that compose it are allowed to modify
- the logical or physical removal of the group
- the logical or physical deletion of text fields of the group, or groups in the group
- moving text or subgroups in the group
- the add-in of a group with new text boxes, new groups, a page break or the call of an external document (pdf)
- alternative groups

Like textzone, access to the personalization of a group obeys the combination of several rules:

- the group is checked editable and / or deletable in the model Ksl Studio (properties of the group)
- alternatives are defined in Ksl Studio for this group (properties)
- the user must have editing rights on preview (Ksl Admin)

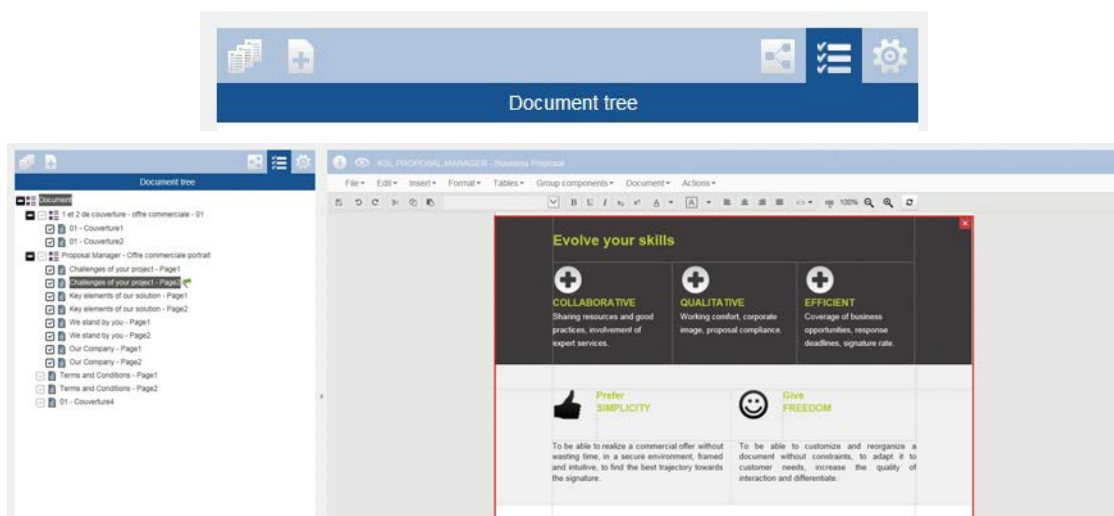
Within the group, the textzone are subject to their own rules, defined on the group in the Ksl Office repository:

- allow splitting on page breaks
- authorize modification
- allow deletion

These last two elements make it possible to protect chosen contents (legal notice and other legal or sensitive texts for example), whatever the context of use. These rules take precedence over the properties of the component in the Studio model.

## 1.2. The "list of customizable components" view

The list of customizable components is available on the banner of the left panel.



This list allows

- to quickly navigate the document, presenting the list of potentially modifiable or deletable components. This is a real time saver on long documents to directly target the content to modify, since the document is positioned exactly on the selected component.
- move textzone within a group by drag & drop ; the components reposition themselves in real time on the document.

It also gives indications on the customization of the current document :











the customizable component is a textzone










the customizable component is a group



the component is deletable (logical deletion)

	the component has been deleted (logical deletion)
	the content of the component has been customized; it can be a text customization or the selection of an alternative to the proposed component by default.
	the component has been added to the document, necessarily inside a group, and it has been customized
	the component is "to be customized" ; it's not yet.
	The attached PDF file encountered a problem downloading
	The attached PDF file is protected
	the component has been added to the document, necessarily inside a group
	there is a new version of the component (not customized) in the repository

Some examples :

<input checked="" type="checkbox"/>  ComptePB - Cas général	The textzone is customizable and deletable It has not been customized.
<input checked="" type="checkbox"/>  Date d'effet - Sans refonte année N 	The textzone is not deletable but it has been customized.
<input checked="" type="checkbox"/>  Base résiliation - 3 mois 	The textzone is not deletable ; it is "to customized".
<input checked="" type="checkbox"/>  Modalités de règlement 	The textzone is not deletable and it has not been customized, but it has a newer version in the repository.
<input checked="" type="checkbox"/>  Complément législation 	The textzone has been added and it has been customized. It is deletable.
<input type="checkbox"/>  <input checked="" type="checkbox"/>  Groupe Législation&Réclamations 	The group is customizable but it is not deletable.
<input checked="" type="checkbox"/>  1.9. Législation traitement données personnelles 	It is composed of 3 text boxes with different personalization properties that can be moved inside the group.
<input checked="" type="checkbox"/>  Complément législation 	
<input checked="" type="checkbox"/>  1.10. Les réclamations	

### 1.3. The "table of contents" view

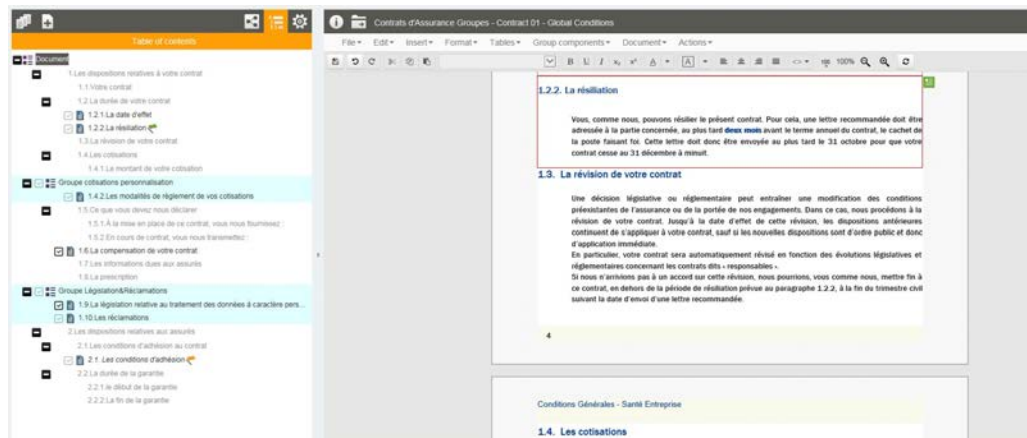
The list of customizable components can be replaced by a view "table of contents" (set at the project level in Ksl Admin), in which case the access button changes .



This view strictly follows the hierarchy of the document and displays all the text levels of the document. It is

organized as a summary.

It is more functional than the list of customizable components in the context of a long and highly structured document, offering a synthetic view of the document.



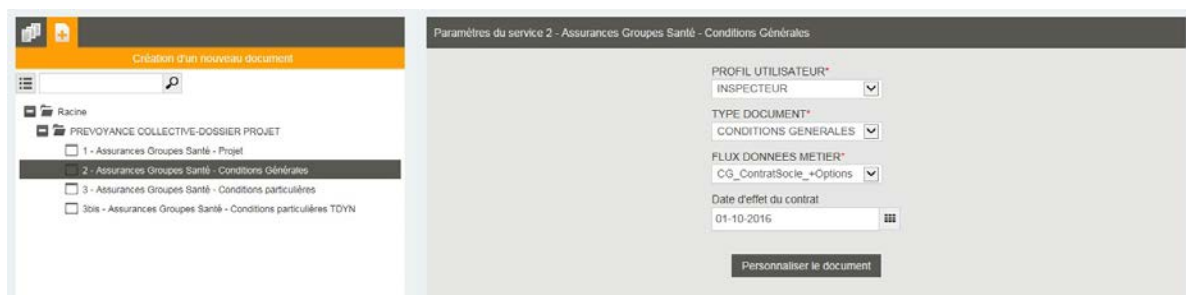
If the presentation changes, it presents the same characteristics, in terms of interactivity, as the list of customizable components, namely:

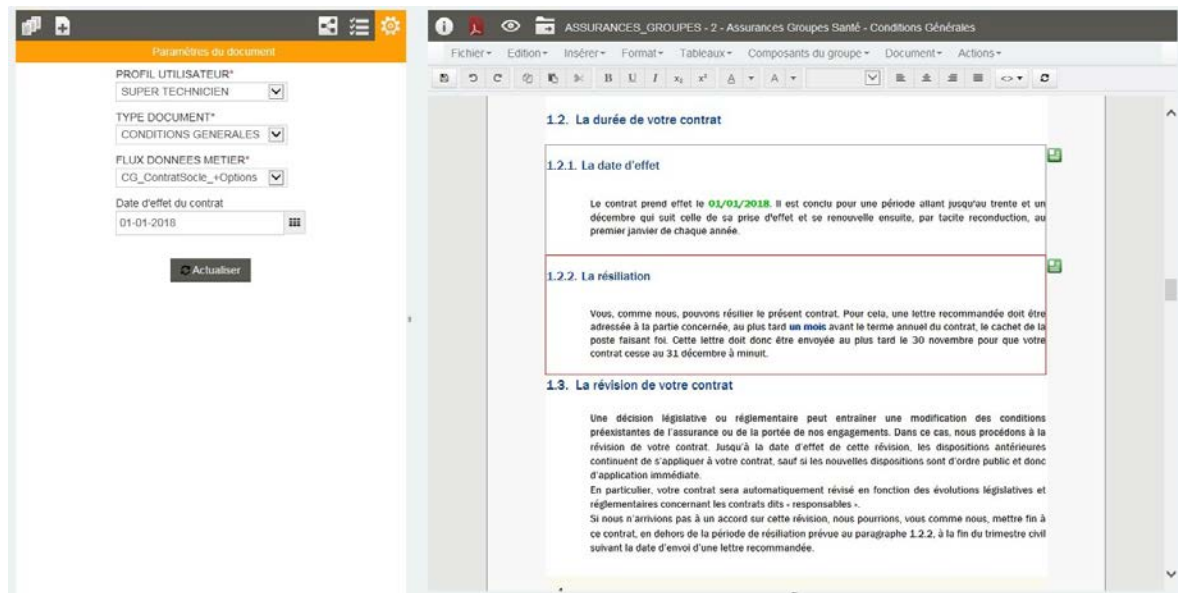
- navigation on customizable components
- customization indicators
- moving components inside a group

## 1.4. Customize the document

### a. The parameters

Launch the interactive document after entering parameters.





The settings are reachable on the left side of the interactive view and they are editable.

The "update" button must be pressed on any parameter change, whatever its nature, to take into account the new rules activated by this change when composing the document.

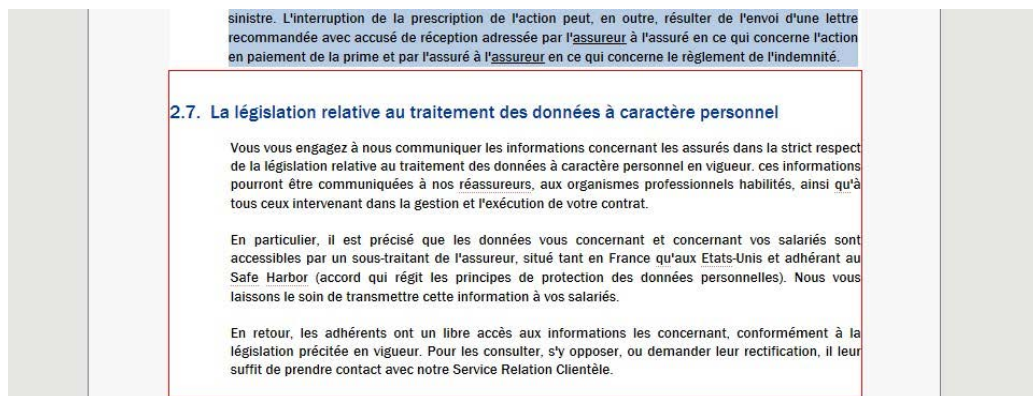
As a reminder, the parameters influence the dynamic call of components, the assembly of these components, and the variability of the document by the selected data stream.

#### To note...

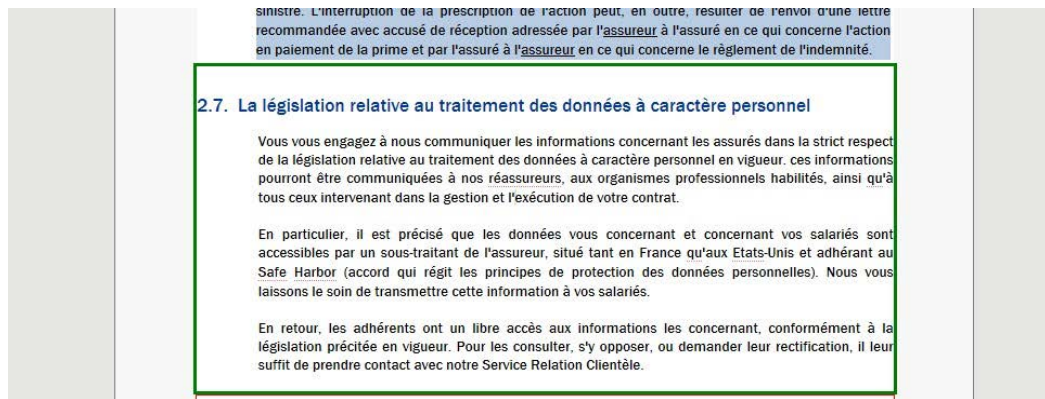
*The valuation of the parameters is preserved when the interactive document is sent to the workflow or when it is archived. As long as the document is not permanently fixed (archived in its final version), the parameters are potentially modifiable on a "MODIFY" action associated with the workflow.*

### b. The content customization

When a textzone is customizable, it is framed in red on the document.



Double-click on the area to customize it; the box turns green and you have access to the usual text editor to edit the content.



The textzone surrounded by gray is an elements whose content is not editable but it has one or more of the following characteristics :

- it is potentially deletable
- alternatives are associated with it
- it is potentially movable when positioned within a group

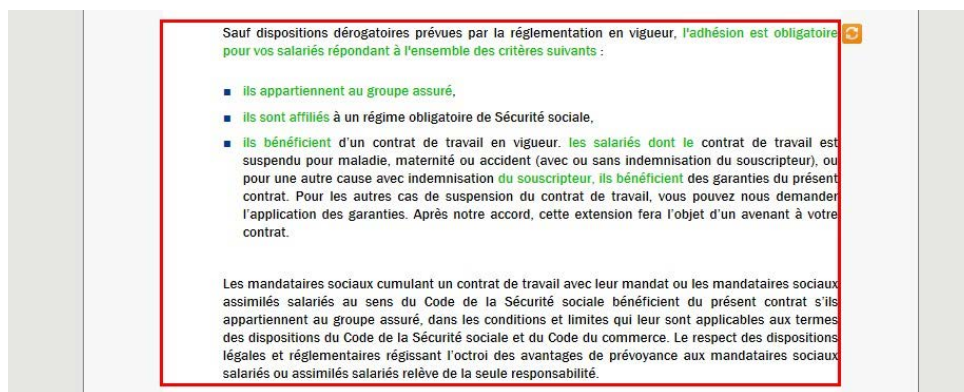
To note...


The text editor toolbar and its menus can be restricted by the view configuration, with only minimal functions.

Unframed content is the "fixed" and, therefore, non-customizable content of the document.


Return to the repository text box

If the "allow custom text areas refresh" setting is set to "allow" in the profile view configuration (Ksl Admin), it is possible to return to the original content (content in the repository), on a custom component.

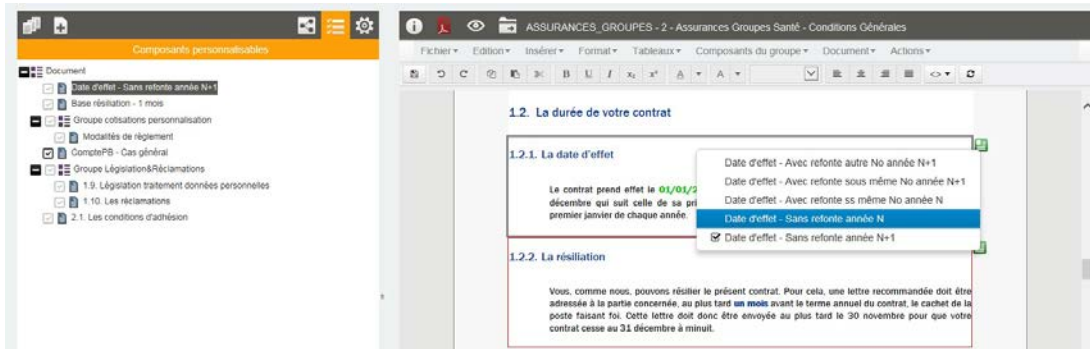


In this case, an icon  appears next to the customized component. Click this icon to replace the custom content with the reference content.

### c. The alternatives

This multiple choice is attached to a textzone or a group. It is materialized by the icon .






Click on the "alternative" icon for a list of alternatives to the current content and select the textzone or group of your choice. A return to the initial textzone is always possible in the context since as it is present in the list.

The content of a textzone with alternative is customizable (red box) or not (gray box).



When the update is allowed and the content of the current alternative has been customized, the icon  is positioned next to the alternatives icon, for a possible return to the reference version of the presented content.

#### d. Remove the components

The textzones and the groups are potentially deletable.

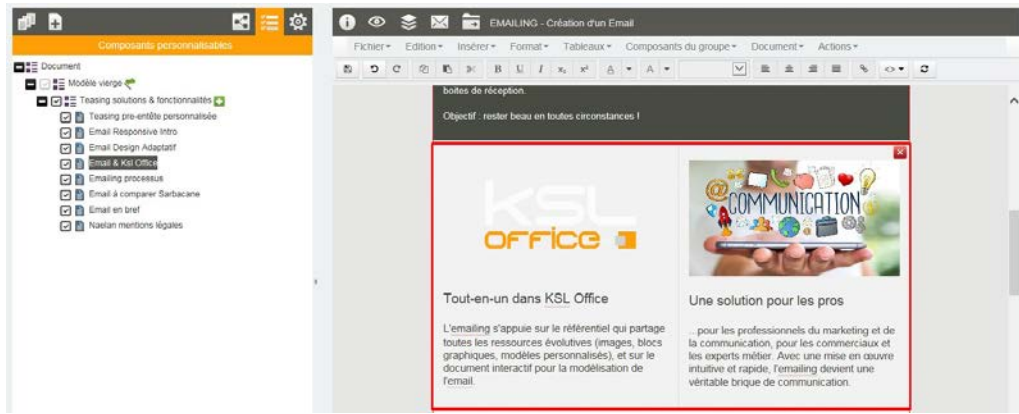
This action is set

- in the properties of the text box or group dropped on the template via Ksl Studio
- in the properties of the text boxes in the group, via the Ksl Office repository

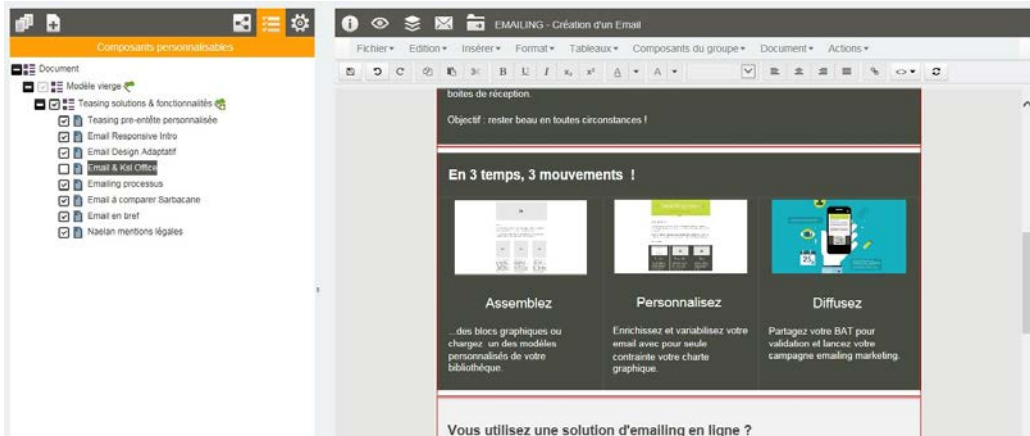
It allows a logical or physical removal of the component.

Logical suppression

A red cross appears on hover over deletable components



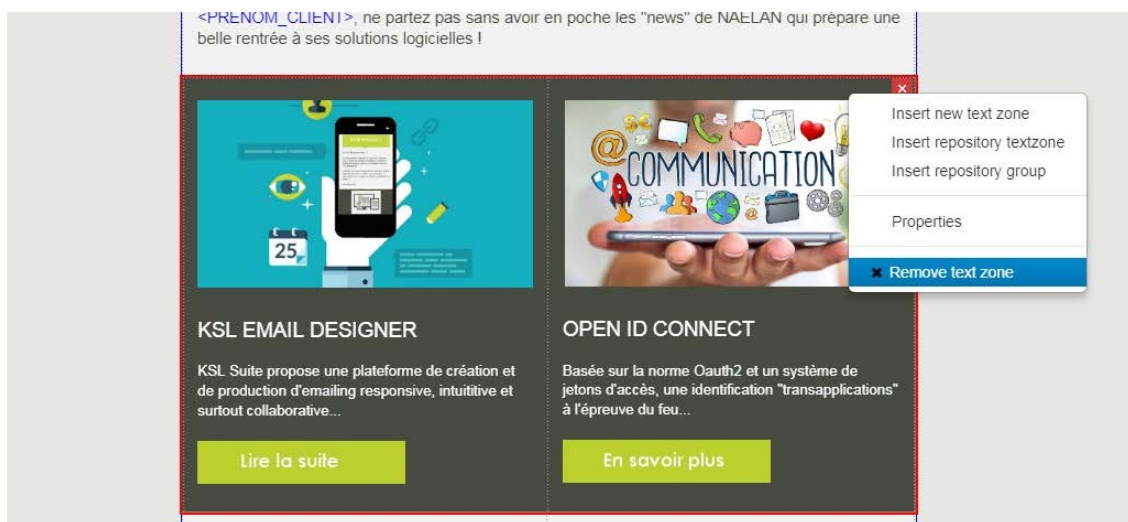
Click on this cross to remove the textzone of your document.



The component no longer exists on your document but it is still present, unchecked, in the list of customizable components (left part). Just check the component again in this list to make it reappear on the document.

Physical suppression

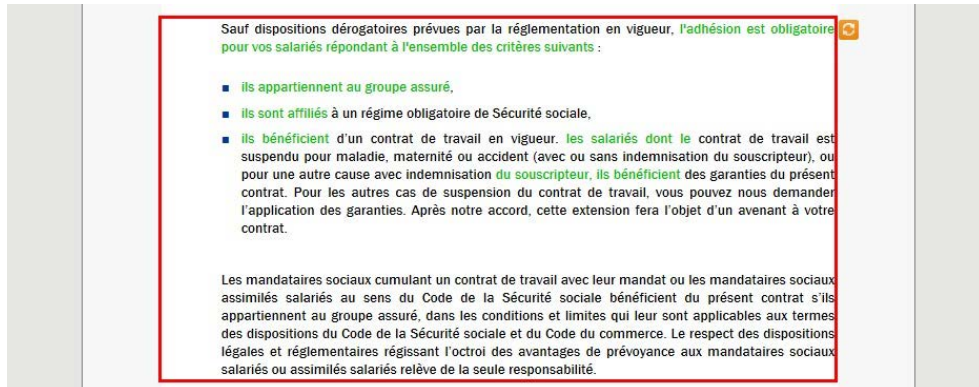
Right click on the component and select "delete text box"



The textzone is permanently deleted from the document and from the list of components.

## e. The variables

The variables in the textzone are evaluated on the preview of the document ; this valuation is distinguished from the fixed text by its green color.



This content can not be modified but is potentially deletable, depending on the setting of the textzone.

It is not possible to declare new variables on an interactive document. Only the variables already declared on the components are integrable to the content.

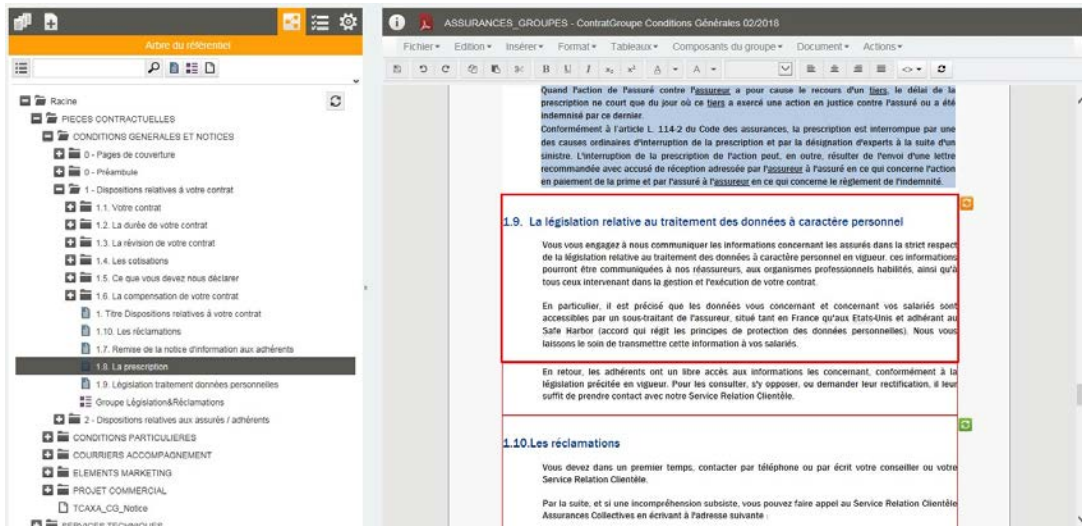
## 1.5. Build the document into a group

A customizable group allows you to build your document from the repository components, beyond just modifying content.

The group can be pre-filled with a minimum of text areas, but it can also be blank, present a blank page to the user to allow him the freedom to assemble custom components or create new components specific to his document.

To enrich your group, you need components, textzones and groups, available in the repository. You have the option to view the enabled repository for your profile on the left side of the screen.





### a. Assembly the components

The assembly of the group's components follows the same rules as in the repository :

- the text boxes and groups in the repository are dropped
  - via a drag & drop from the repository tree to the component before the drop
  - or by right-clicking on the same component, directly on the document. The advantage of adding on right click is the possible preview of the selected components.
- textzones and local groups are created from the "Insert" menu or from the right-click menu
- the pdf file and the page break are inserted from the "Insert" menu or from the right-click menu

### b. Organize the components

Group components can be re-organized within the group only

- on the document itself, by drag & drop of the component to move to the target area
- on the list of customizable components, drag and drop the component to move in the list to the desired location

The added components are potentially deletable, logically and physically.

### c. Variant operation within a group

Regardless of the nesting level of the groups, the text box variants are associated, if they exist, with the master / root group variant and not with the intermediate groups.

For example :

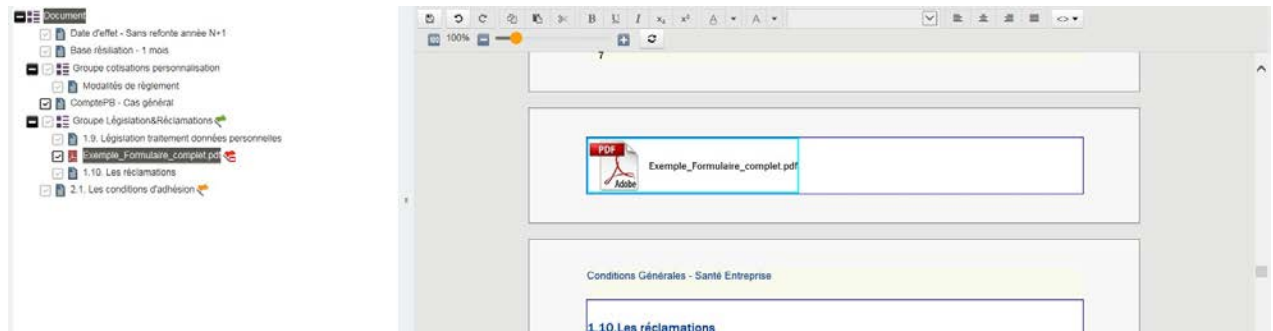
- The "agency" variant of a master group
- may contain a variant subgroup "national reference",
- which can itself contain the "agency" variants of several text boxes
- as well as text boxes in variant "national reference", without variants "agency"

To note...

The maintenance of the master group in the repository shows the same behavior.

## 1.6. Add appendices

It is possible to add PDF appendices to the current document, inside a group authorized for modification.



To download the PDF appendix again, on the summary (or list of components):

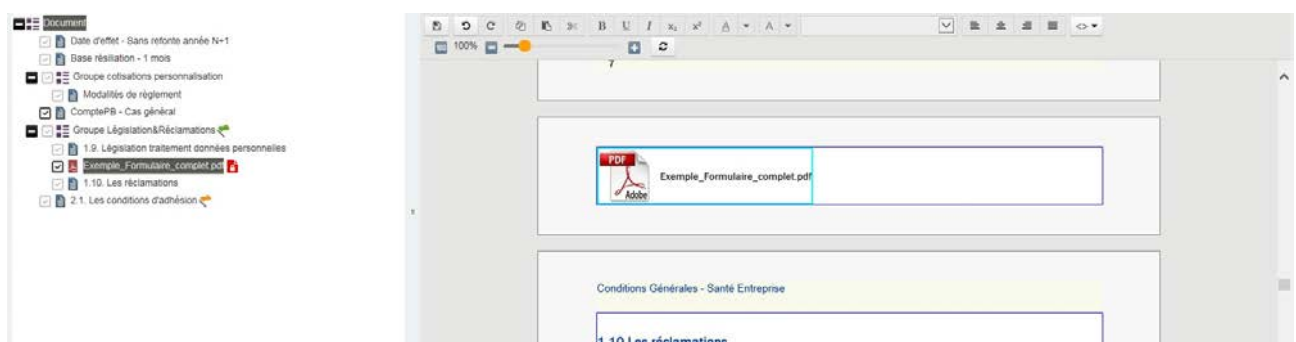
- right click on the PDF at the red flag
- select "properties", modify the URL (or not) then "refresh" to restart the upload

### Protected PDF

The protection of PDF does not allow us to rework the document for the assembly, renumbering, selection or deletion of certain pages.

The protection of the PDF appendix is detected

- in the PDF preview of the interactive document, if it is an appendix already integrated into the document on an earlier version of KSL Suite (without protection control), the interface gives a clear message. A refresh will show the "locked document" indicator next to the concerned PDF. You will not be able to generate a global PDF document until the file has been deleted or replaced.



- If the url of your appendix points to a protected file, it will also be detected during the PDF preview with a message "the URL ... is not a valid file". A refresh will bring up the red flag of the corrupted file. You will need to point the URL to a new unprotected file.
- upstream, during the upload of the annex in question: a message is then given at the end of upload on the impossibility of attaching the protected PDF to the current document. The appendix is deleted.

In either case, it is essential to have the unprotected file attached to the interactive document. The only solution is to delete the protected PDF and replace it with an unprotected version.

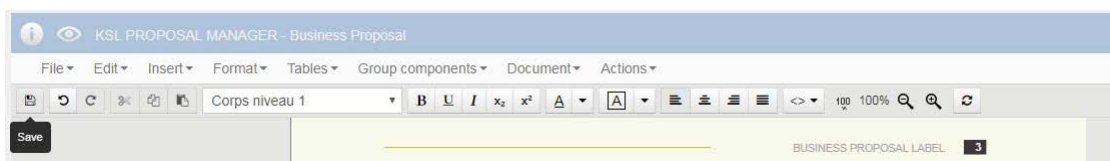
## 1.7. Actions on the document

The top bar of the document shows the action buttons configured for the interactive document.

### a. save

This is the first action available on the toolbar of the editor.

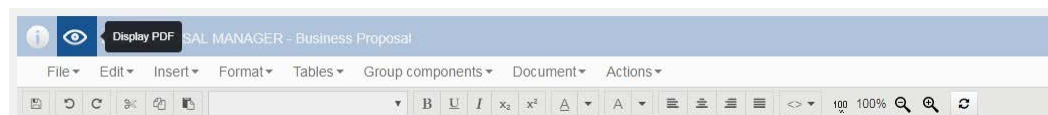
The document must be registered regularly if it is highly personalized.



The interactive document must also be saved before any other action, including archiving or converting to final document in PDF format.

### b. view

The preview of the document presents the final rendered paginated. It is presented in PDF format, which gives quick access to a local recording or printing.



If the document calls a large number of pages (external pdf) which multiplies the pages displayed, it is possible to set the preview with or without these appendices.

Some processes require previews in another format : word to obtain an external document to modify , or html for the bodies of responsive email for example (management email, marketing or commercial). In all cases, the more generic button is available ("eye" icon).

### c. Other actions

Several additional actions are available in the Salesforce plug-in :

- overview of the document
- editing the interactive document
- archiving the interactive document
- archiving and versioning of the document in PDF format
- download the document for an attachment in an Email

- sending the document in the validation workflow

Each action is the link between the document composed by KSL and the features offered natively by Salesforce.



NAELAN - Lyon  
4 rue Claude Chappe  
69370 Saint-Didier au Mont d'Or  
France  
Tél. +33 (0)4 37 59 81 40

NAELAN - Paris  
4 Place Louis Armand  
75023 Paris  
France  
Tél. +33 (0)1 72 76 80 86

[www.naelan.com](http://www.naelan.com)