

KSL Office User Guide

Mai 2020



Summary

1. Introduction	5
2. Profiles administration	6
2.1. Ksl Office setup - Office profiles	6
a. Create a new Office profile	6
b. Select Views in an Office profile	7
c. Customize the KSL Office portal	23
d. Give permissions to users	24
2.2. Documentary production Services and parameters	25
a. Naming and ordering input parameters	25
b. The list of values	26
c. Permissions	26
3. The Office application of KSL Office	27
3.1. Connection to the standalone Office application	27
3.2. Direct connection to an Office view	27
3.3. Welcome page	28
a. The News feed area	28
b. This Document list area	28
3.4. Customize the Office labels	28
3.5. The user configuration	29
3.6. Notifications and errors display	30
4. The style sheet view	32
4.1. Overview	32
4.2. Style sheets management	32
a. Add a new style sheet	32
b. Copy an existing style sheet	33
c. Delete an existing style sheet	33
4.3. Management of the style sheet elements	34
a. Add a new element to the style sheet	34
b. Copy an element	35
c. Delete an element	35
5. The Repository view	37
5.1. Overview	37
5.2. The classification tree	37
5.3. Search and selection tools	37
a. Browsing in the repository: tree or list	37
b. Searching a component by its name	38
c. Filtering by component type	39
d. Advanced search criteria	39
5.4. Adding a new component	39
a. Adding a Picture	40
b. Adding an External file	40
c. Adding a Text zone	41
d. Adding a Text zone variant	41
e. Adding a Text zone group	42
f. Adding a Group variant	43
5.5. Copying an existing component	43
5.6. Deleting an existing component	44
5.7. View and modify a component	44
a. Modify a picture	44
b. Modify and view an external file	44
c. Modify a text zone or a group	45
5.8. The Text zone editor	45
a. Overview	45
b. Page layout	47
c. Style sheet	48

Summary

<i>d. Inserting tables</i>	51
<i>e. Search & replace</i>	54
<i>f. Inserting a picture</i>	55
<i>g. Spell checking</i>	56
<i>h. Inserting variables</i>	57
5.9. The group editor	59
<i>a. Overview</i>	59
<i>b. Adding and maintaining the components of a group</i>	60
5.10. View and modify a component	65
<i>a. Modify a picture</i>	66
<i>b. Modify and view an external file</i>	66
<i>c. Modify a text zone or a group</i>	66
6. The variant comparison view	68
6.1. Variants and repository	68
6.2. Variant comparison tool	68
<i>a. Side by side or Top and Bottom views</i>	69
<i>b. Create and update variants</i>	70
7. The Document Production view	73
7.1. Create a new document via KSL Office	73
7.2. On-demand generation	73
7.3. Interactive edition	74
7.4. Interactive document in progress (Document list)	75
7.5. Retrieving an interactive document in case of browser or workstation problem	76
8. Interactive document	77
8.1. Document display	77
8.2. The personalizable components	77
<i>a. The Text zone, personalizing content</i>	77
<i>b. The Group of text zones, customizing document structure and content</i>	78
8.3. The "Document tree" view	78
8.4. The "Table of contents" view	80
8.5. Personalize the document	81
<i>a. The parameters</i>	81
<i>b. The content personalization</i>	82
<i>c. The alternatives</i>	85
<i>d. Remove the components</i>	85
<i>e. The variables</i>	87
8.6. Build the document in a group	87
<i>a. Assembly the components</i>	88
<i>b. Organize the components</i>	88
<i>c. Variant behavior within a group</i>	88
8.7. Add appendices	89
8.8. Update the content of an interactive document	91
<i>a. Freeze the document</i>	91
<i>b. Update individually</i>	91
<i>c. Update the entire document</i>	92
<i>d. Use case: Updating a contract.</i>	93
8.9. Update the repository using personalized content	94
8.10. Actions on the document	95
<i>a. Save</i>	95
<i>b. View</i>	96
<i>c. Print</i>	96
<i>d. Send to another user</i>	97
<i>e. Deliver</i>	97
<i>f. Archive</i>	97
9. Archiving and Workflow	98
9.1. Archived document	98

Summary

<i>a.Search</i>	98
<i>b.View</i>	99
9.2. The predefined views	100
9.3. Archiving an external document	100
9.4. In a workflow	101
<i>a.Validation workflow</i>	101
<i>b.Redaction workflow</i>	102
10. The translation dictionary	103

1. Introduction

KSL Office is a collaborative web portal dedicated to functional, business and end-users.

The users can connect to this application:

- To create and maintain the shared resources of their documentary projects: essentially paragraphs, images and style sheets, as well as external PDF files
- To produce, personalize, validate, archive and send their documents through different communication channels
- To quickly and easily access to the archived documents

KSL Office is multilingual and the application language is automatically adapted to the connected user's language.

This web portal is also managed by authorizations. The user can be administrator with all the rights or, on the contrary, be authorized to use a restricted number of features.

His profile allows him:

- to update and modify some components,
- to validate some documents,
- to access to some archived documents,
- to use some tabs of the portal.

The KSL Office portal is also customizable with your corporate colors and logos to be very close and integrated with your other legacy applications.

The aim of this documentation is to guide you in the implementation and use of the different functions. This documentation can also be customizable: you can update it for your own use in relation with your the configuration of your projects.

2. Profiles administration

Implementing and customizing the portal can be applied from the Ksl Admin administration application.

It included:

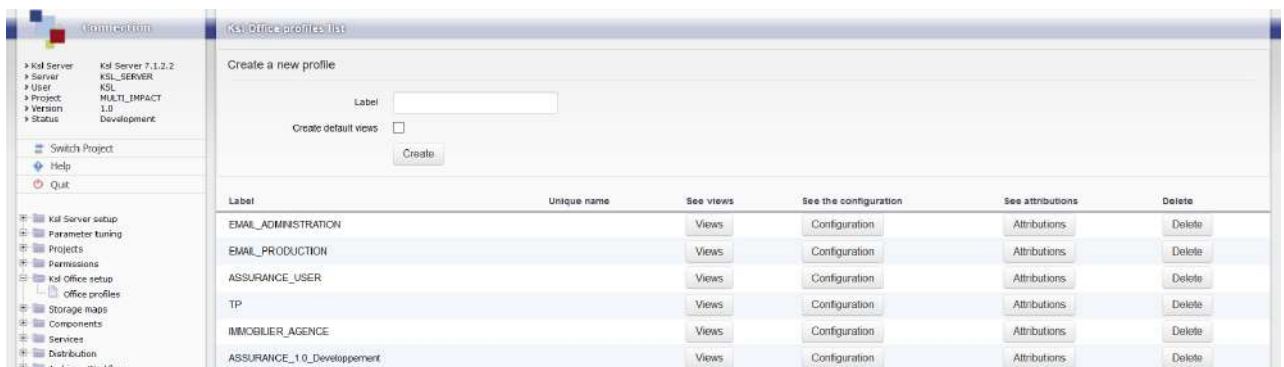
- a "user rights" part to define the access rights to components and production/delivery services; this part is detailed in the Ksl Admin documentation, and is common to the different design and production mode.
- a "view configuration" part (tabs) to customize the user interface; this configuration is dedicated to and detailed hereafter.

2.1. Ksl Office setup - Office profiles

a. Create a new Office profile

Access in KSL Admin: Ksl Office setup > Office profiles
Required permissions: KSL Server administrator

Click on Ksl Office setup > Office profiles to access to the screen listing the server Office profiles. Note that a profile can reference several projects. Of course several profiles can be created for each project.



A profile describes the views displayed in the web portal, the targeted project and the users or groups authorized to connect to this profile. Each view can also be linked to a different project : the web portal can be "multi projects".

i A user or a group can also be multi-profiles : in this case, he will be able in the portal, to select/change the profile.

A profile is defined by its Label but a Unique Name field can also be defined (optional).

i The unique name is used for a direct call of the profile by an external application; the application will be able to specify this unique name with the parameter KslView when calling a KSL web Service.

To create a new profile:

- Define the new profile label.
- If necessary, select the "Create default views" option: if this option is selected, the default tabs "Welcome", "Repository", "Document production" and "Document library" are automatically created.
- Select the project associated to the profile; by default, the tabs will be linked to this project.
- Select the button "Create" to create the profile. The new profile is added to the list and you can tune its configuration.
- If necessary, click on the second column Unique name of the profile created to set its unique name.

Ksl Office profiles list

Create a new profile

Label

Create default views

+ Create

b. Select Views in an Office profile

Views for profile CONTRATS Default

To create your KSL Office menu, drag and drop the following folders and views into the yellow frame:

Create a folder Document library Search in document library Dictionary Post-Office Welcome For maintaining text zones, text zones groups, images and pdf files

Produce a document with or without personalization Comparison of group and textzone variants Emailing

Document production Repository

[← Back to profiles list](#)



The profile configuration in KSL Admin allows to select the tabs that will be present on the Office portal and customize them. These tabs are also called Views.



The top button bar contains the available View types (tabs). The bottom yellow frame shows the views inserted into the profile. In order to organize this profile, simply drag and drop buttons from the top menu, towards the bottom yellow frame. The top button bar contains standard views like in the example the "Document production" view, and folder type views .



For each of the selected standard views, the buttons allow to define :

- Label edition : allows to change the label that appears on the KSL Office tab for this profile.
- Unique name edition : allows to change the unique name that will be used when for example an

external application wants to display a view; this application can specify this unique name with the parameter KslView when calling via Web Service.

- Configuration  : allows to change the name of the web page as well as the connection project for the current view. Some views have an advanced configuration page, including the resource repository page.
- Delete  : to delete the view in the profile.

Two actions are possible for the Folder type views   :

- Label edition .
- Delete .

The views displayed are those defined by default during creation. If no view has been set, simply select the view of your choice on the top banner and move it to the bottom yellow banner.


The selected views can be re-ordered by a simple drag-and-drop.

KSL office Welcome view

This view is created from the button Welcome.


it allows you to add to the Office portal a tab that is intended to be the default welcome page of the KSL Office web application; it is essentially informative; it specifies the details of Naelan support, presents a number of widgets and displays a text zone dedicated to information for users (News). It also lists the current documents giving the possibility to access them with a click.

This page is not mandatory; if users need to access, for example, the production of their documents directly after logging in, simply delete the Welcome view and position another view in the first position on the left.

Configuration  of the Welcome view:

Parameters	Description	Default value
Page title	Page title associated to the view Not to be confused with the tab label of this view in KSL Office.	Welcome
Project	Project on which the view will be based.	

The Repository view of KSL office

This view is created from the button Repository . When renamed with the button  , the proposed name is: Repository.

This view is only displayed if the project contains components such as text zones, groups, images, or

external files and if the user (or the group to which he belongs) is allowed to access those components.


This view is dedicated to project management and business users with an administrator profile and provides access to components, and allows you to create and update the shareable components of the KSL project.

The configuration ✕ of this view is given below:

View configuration Repository from profile GESTION_RH_DEV		
General		
Property name	Property description	Property value
Page title	Page Title associated with this view	Repository
Project	View project	GESTION_RH_DEV - 2.0 - Development
Enable hyperlinks	Enable hyperlinks for text and pictures. Only for sending e-mails.	No
Default style fo hyperlinks	Text style used when adding new hyperlink	
Allow to modify picture name	Allow using variables in brackets for picture name. Only for sending e-mails.	No
Filters		
Variants filters		
Menu configuration		
← Back to profiles list ← Back		













This configuration page allows in particular :













- to disable much of the text editor toolbar to limit the functions given to users for creating and update text contents
- allow display filters by component type
- to fine-tune the entry of advanced search criteria such as the date of change or part of the storage map, or variants
- allow hyperlinks to be defined

 Access to this view is combined with the permission rules defined for users or groups of users on components and the storage map.

Parameter details:

Parameters	Description	Default values
Page title	Page title associated to the view	Repository
Project	Project on which the view will be based.	
Enables hyperlinks	Allow links on text and images. Taken into account only for the design of emails. Enable this option if KSL Email Designer is used.	No
Default style for hyperlinks	KSL style sheet text Style, used when inserting a new hyperlink into a repository text zone. The user can then immediately identify the link inserted in the text of the text zone. It can also change this style (e.g. by choosing a different color from the style sheet).	

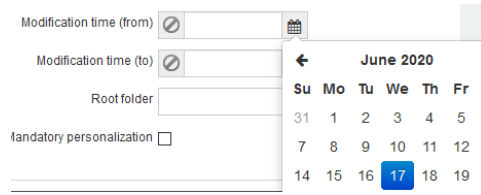
Allow to modify picture name	<p>Allow the use of variables between < and > for the image name.</p> <p>Only for email design.</p> <p>Enable this option if KSL Email Designer is used.</p>	No
Filter : display text zones	<p>Sets whether or not to activate the filter on the Text zone components in the default repository tree.</p> <ul style="list-style-type: none"> - If the filter is set to No, components are hidden and the button  is grayed out by default. This option does not prevent the user from selecting the button to disable the filter. - If the filter is set to Yes, components are displayed and the button is selectable . <p>This filter applies to user-accessible images -  see Chapter Permissions - Components.</p>	Yes
Display mode for text zone filter	<p>Sets whether the user can see the contents of the filter, and whether they can edit it.</p> <ul style="list-style-type: none"> - Hidden: the button  is not displayed in the view for users. Users have access to external files based on their permissions. - Visible: the button  is displayed in the view for users. Users have access to external files based on their permissions. - Modifiable: the button  is displayed in the view for users. User can activate or deactivate the filter with this button. 	Modifiable
Filter : display groups	<p>Sets whether or not to activate the filter on the Group components in the default repository tree.</p> <ul style="list-style-type: none"> - If the filter is set to No, components are hidden and the button  is grayed out by default. This option does not prevent the user from selecting the button to disable the filter. - If the filter is set to Yes, components are displayed and the button is selectable . <p>This filter applies to user-accessible images -  see Chapter Permissions - Components.</p>	Yes
Display mode for group filter	<p>Sets whether the user can see the contents of the filter, and whether they can edit it.</p> <ul style="list-style-type: none"> - Hidden: the button  is not displayed in the view for users. Users have access to external files based on their permissions. - Visible: the button  is displayed in the view for users. Users have access to external files based on their permissions. - Modifiable: the button  is displayed in the view for users. User can activate or deactivate the filter with this button. 	Modifiable

Filter : display images	<p>Sets whether or not to activate the filter on the Images components in the default repository tree.</p> <ul style="list-style-type: none"> - If the filter is set to No, components are hidden and the button  is grayed out by default. This option does not prevent the user from selecting the button to disable the filter. - If the filter is set to Yes, components are displayed and the button is selectable . <p>This filter applies to user-accessible images -  see Chapter Permissions - Components.</p>	Yes
Display mode for images filter	<p>Sets whether the user can see the contents of the filter, and whether they can edit it.</p> <ul style="list-style-type: none"> - Hidden: the button  is not displayed in the view for users. Users have access to external files based on their permissions. - Visible: the button  is displayed in the view for users. Users have access to external files based on their permissions. - Modifiable: the button  is displayed in the view for users. User can activate or deactivate the filter with this button. 	Modifiable
Filter : display external files	<p>Sets whether or not to activate the filter on the External files components in the default repository tree.</p> <ul style="list-style-type: none"> - If the filter is set to No, components are hidden and the button  is grayed out by default. This option does not prevent the user from selecting the button to disable the filter. - If the filter is set to Yes, components are displayed and the button is selectable . <p>This filter applies to user-accessible images -  see Chapter Permissions - Components.</p>	Yes
Display mode for external files filter	<p>Sets whether the user can see the contents of the filter, and whether they can edit it.</p> <p>Three possible values:</p> <ul style="list-style-type: none"> - Hidden: the button  is not displayed in the view for users. Users have access to external files based on their permissions. - Visible: the button  is displayed in the view for users. Users have access to external files based on their permissions. - Modifiable: the button  is displayed in the view for users. User can activate or deactivate the filter with this button. 	Modifiable

Filter on start modification date

Displays only components that have changed since the specified date. Displaying a calendar allows you to specify this date.

No value



This parameter is particularly interesting when changing the content of the repository (for example, when merging the company with another or when changing brands); it allows to display only the components updated from the modification start, regardless of the permissions.

Display mode for start modification date filter

This parameter acts on the display of filter Filter on start modification date. Sets whether the user can see the filter, and whether they can edit it.

Modifiable



Three possible values :

- Hidden: the filter is not displayed to the user in the view. The filter applies or does not apply depending on the parameter Filter on start modification date.
- Visible: the filter is displayed to the user in the view, but is not editable. The filter applies or does not apply depending on the parameter Filter on start modification date.
- Modifiable: the filter is displayed and can be used by the use.

Filter on end modification date

Displays only components that have been modified up to the specified date. Displaying a calendar allows you to specify this date.

No value


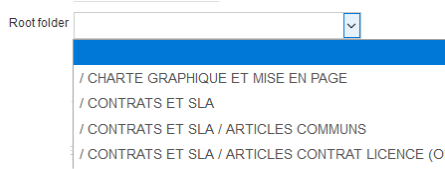
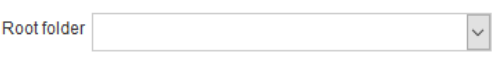
Display mode for end modification date filter


This parameter acts on the display of filter Filter on end modification date. Sets whether the user can see the filter, and whether they can edit it.

Modifiable

Three possible values :

- Hidden: the filter is not displayed to the user in the view. The filter applies or does not apply depending on the parameter Filter on end modification date.
- Visible: the filter is displayed to the user in the view, but is not editable. The filter applies or does not apply depending on the parameter Filter on end modification date.
- Modifiable: the filter is displayed and can be used by the user.

<p>Parent path</p>	<p>This parameter specifies the root of the tree to display. This filter applies to user-accessible components -  see chapter Permissions - Components of this guide. To change this path, click on the parameter and select the classification node in the window that appears.</p> <p><i>Example:</i></p> 	
<p>Display mode for path filter</p>	<p>This parameter acts on the display of the filter Root folder in the view.</p>  <p>Sets whether the user can see the filter, and whether they can edit it. Three values are possible:</p> <ul style="list-style-type: none"> - Hidden: the filter is not displayed to the user in the view. The filter applies or does not apply depending on the parameter Parent path - Visible: the filter is displayed to the user in the view, but is not editable. The filter applies or does not apply depending on the parameter Parent path. - Modifiable: the filter is displayed and can be used by the user. 	<p>Modifiable</p>
<p>Personalization flag</p>	<p>Filter on personalization flag: Two options are possible :</p> <ul style="list-style-type: none"> - No value: if this option is unchecked, all text zones are displayed. - To personalize: if this option is checked, only text zones with the option "to customize" are displayed. 	<p>No value</p>
<p>Display mode for personalization flag filter</p>	<p>Sets whether the user can see the filter on the personalization flags, and whether they can edit it above the component tree.</p> <p>Mandatory personalization <input type="checkbox"/></p> <p>Three values are possible:</p> <ul style="list-style-type: none"> - Hidden: the filter is not displayed to the user in the view. The filter applies or does not apply depending on the parameter Personalization flag. - Visible: the filter is displayed to the user in the view, but is not editable. The filter applies or does not apply depending on the parameter Personalization flag. - Modifiable : le filtre est affiché et peut être utilisé par l'utilisateur. 	<p>Modifiable</p>

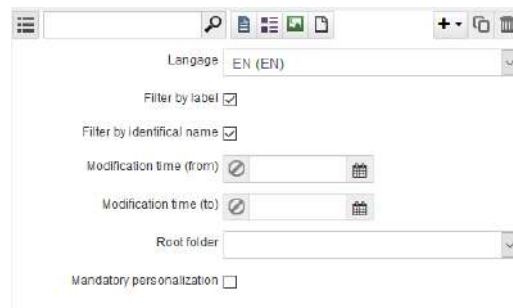
Filter : display also read only components	Also displays components that are read-only.	Yes
Display mode for read only filter	<p>Sets whether the user can view the filter on components read-only, and whether they can edit it above the component tree.</p> <p>Mandatory personalization <input type="checkbox"/></p> <p>Three values are possible:</p> <ul style="list-style-type: none"> - Hidden: the filter is not displayed to the user in the view. The filter applies or does not apply depending on the parameter Filter : display also read only components. - Visible: the filter is displayed to the user in the view, but is not editable. The filter applies or does not apply depending on the parameter Filter : display also read only components. - Modifiable: the filter is displayed and can be used by the user. 	Hidden
Selection criteria n°1 name	These two parameters allow you to specify the criterion of variants and the value of this criterion on which to filter text zones and groups.	
Selection criteria n°1 value	<p> See criteria in chapter Permissions - Components of this guide.</p> <p><i>Example: if the project is configured to handle variants with the "agence" (i.e. agency) criterion, and if this criterion can take the PARIS and NEW-YORK values, then positioning the two parameters respectively to the PARIS and NEW-YORK values allows to display only the text zones and groups meeting this criterion.</i></p>	

Display mode for selection criteria n°1	Sets whether the user can see the filter on the variant criterion, and whether they can modify it above the component tree.	Modifiable
---	---	------------

Three values are possible:

- Hidden: the filter is not displayed to the user in the view. The filter applies or does not apply to the value of the selected criterion 1.
- Visible: the filter is displayed to the user in the view, but is not editable. The filter applies or does not apply to the value of the selected criterion 1.
- Modifiable: the filter is displayed and can be used by the user.

In the example, below the "Language" criterion is displayed to offer filtering of components on a criterion value.



Selection criteria n°2 name	Criterion and Criterion value for setting an additional filter on a variant criterion.	
Selection criteria n°2 value		
Display mode for selection criteria n°2	See description in Display mode for selection criteria n°1.	Modifiable
Enable the bold menu	Enable or disable menus and buttons to set text in bold.	Yes
Enable the italic menu	Enable or disable menus and buttons to set text in italic.	Yes
Enable the underlined menu	Enables the activation or deactivation of menus and buttons to underline text.	Yes
Enable the subscript-superscript menu	Enables the activation or deactivation of menus and buttons to set text in subscript or superscript.	Yes
Enable the text color menu	Enables the activation or deactivation of menus and buttons to color text.	Yes
Enable the background color menu	Allows the activation or deactivation of menus and buttons to color background text.	Yes
Enable the change of style	Allows the activation or deactivation of menus and buttons to change the style of the text.	Yes
Enable the alignment change	Enables the activation or deactivation of menus and buttons to change the alignment of the text.	Yes

Enable the variable insertion menu	Enables the activation or deactivation of menus and buttons to insert a variable.	Yes
Enable the stylesheet menu	Enable or disable menus and buttons to change the style sheet.	Yes
Enable the local image insertion menu	Enables the activation or deactivation of menus and buttons to insert a local image.	Yes
Enable the repository image insertion menu	Allows the activation or deactivation of menus and buttons to insert an image of the KSL repository.	Yes
Enable the border and shading menu	Enables the activation or deactivation of menus and buttons to change the display format of variables.	Yes
Enable the paragraph menu	Enables the activation or deactivation of menus and buttons to change the display format of variables.	Yes
Enable the bullet and numbering menu	Enables the activation or deactivation of menus and buttons to change the display format of variables.	Yes
Enable the variable format menu	Enables the activation or deactivation of menus and buttons to change the display format of variables.	Yes
Enable the caesura menu	Allows the activation or deactivation of menus and buttons to manage the hyphenation.	Yes
Enable the table menu	Enables the activation or deactivation of menus and buttons to manage tables.	Yes
Enable the spell checker menu	Enables the activation or deactivation of menus and buttons for the spell checker.	Yes
Enable the layout menu	Enables the activation or deactivation of menus and buttons to change the layout.	Yes
Enable the "declare variable" menu	Enables the activation or deactivation of menus and buttons to declare variables.	Yes

The Document Production view of KSL Office

This view is only displayed if the project contains services and if the user (or group to which he belongs) is allowed to access production services, in transactional or interactive mode, for the project.

An advanced configuration view  exists for this view :

View configuration Document production from profile COMMERCIEL_OLD


▾ General

Property name	Property description	Property value
Page title	Page Title associated with this view.	Document production
Project	View project	COMMERCIAL_NAELAN - 1.0 - Development
Allow saving text zones in repository	Allow saving text zones from interactive document	No
Allow refreshing from repository	Allow refreshing all document non modified text zones	No
Allow refreshing personalized text zones	Allow coming back to repository text zone	Allowed only when document is freeze

▸ Menu configuration


The configuration allows in particular:

- to disable most of the toolbar function of the text editor to limit the functions given to users for the personalization of the document that is produced (end user profile in general)
- allow updating repository text zones from an interactive document
- allow the interactive document text zones to be updated from the repository







 Note about the two parameters about the refreshing of text zones : "Allow refreshing from repository" and "Allow refreshing personalized text zones":

These two parameters allow to cover several functional needs:

- A general refresh of all the document text zones: i.e. an automatic update of non-personalizable text zones and non-personalized text zones when the action is launched.
- A refresh of all the personalized text zones: that allows a return to the reference text zone (the ones of the repository). In this case, 3 possible options :
 - simple authorization: it allows the user to voluntarily return to the reference version of each text zone if the user wants to remove the personalization of a text zone (for example); in this context the non-personalized text zones are updated automatically.
 - authorization if the document is frozen: same objective as before; in this context, non-personalized text zones will not be updated automatically but voluntarily, on indications of availability of a newer version in the repository.
 - unauthorized: this option protects the actual personalized content and does not allow the user to replace it with reference (repository) content.

Configuration parameters  of the Document production view:

Parameters	Description	Default values
Page title	Page title associated to the view.	Document production
Project	Project on which the view will be based.	The default project of the current Profile or the project on which profile was created
Allow saving text zone in repository	Allows a user who has the appropriate permissions on the repository, to substitute from the interactive editor, a text zone of the repository by its modified version of his interactive document. This saving changes text zones in the repository.	No

Allow refreshing from repository	<p>Allows to refresh all unmodified text zones of the interactive document. The text zones of the document are replaced by the newer repository text zones.</p> <p>This parameter allows a user from the interactive document to update all non-personalizable fixed content of his archived interactive document, whose content has been frozen (frozen/archived or frozen/saved as current document). This saving changes text zones of the interactive document.</p>	No
Allow refreshing personalized text zones	<p>Allows updating text zone of an interactive document to newer versions (of these text zones) available in the repository. With this action some text zones of the interactive document will change.</p> <p>Three values are possible:</p> <ul style="list-style-type: none"> - Allowed: the user can refresh the text zones that have been personalized. - Not Allowed. - Allowed only when document is frozen (document whose contents were frozen during archiving). <p>If this parameter is set to Allowed or Allowed only when document is frozen, then the button  or  appears on to the right of each text zone that has been personalized in the interactive document. The button  appears when if the date of modification of the text zone in the repository is greater than the one in the document. This button replaces the personalized text zone with the reference text zone of the repository.</p> <p> After substitution, the button  of the tool bar allows to cancel the action (but if you quit the interactive document and reopen it, the previous action cannot be cancel anymore).</p> <p> It is important to note that this update feature is usable for any interactive document, archived or not (with restrictions on its frozen or non-frozen nature for the 3rd value).</p>	Allowed only when document is frozen
Enable the bold menu	Enable or disable menus and buttons to set text in bold.	Yes
Enable the italic menu	Enable or disable menus and buttons to set text in italic.	Yes
Enable the underlined menu	Enables the activation or deactivation of menus and buttons to underline text.	Yes
Enable the subscript-superscript menu	Enables the activation or deactivation of menus and buttons to set text in subscript or superscript.	Yes

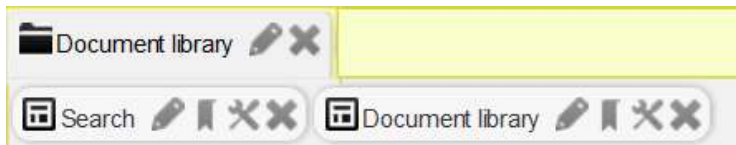
Enable the text color menu	Enables the activation or deactivation of menus and buttons to color text.	Yes
Enable the background color menu	Allows the activation or deactivation of menus and buttons to color background text.	Yes
Enable the change of style	Allows the activation or deactivation of menus and buttons to change the style of the text.	Yes
Enable the alignment change	Enables the activation or deactivation of menus and buttons to change the alignment of the text.	Yes
Enable the variable insertion menu	Enables the activation or deactivation of menus and buttons to insert a variable.	Yes
Enable the stylesheet menu	Enable or disable menus and buttons to change the style sheet.	Yes
Enable the local image insertion menu	Enables the activation or deactivation of menus and buttons to insert a local image.	Yes
Enable the repository image insertion menu	Allows the activation or deactivation of menus and buttons to insert an image of the KSL repository.	Yes
Enable the borders and shading menu	Enables the activation or deactivation of menus and buttons to manage borders and shading.	Yes
Enable the paragraph menu	Enables the activation or deactivation of menus and buttons to manage paragraphs.	Yes
Enable the bullets and numbering menu	Enables the activation or deactivation of menus and buttons to manage bullet and numbering.	Yes
Enable the variable format menu	Enables the activation or deactivation of menus and buttons to manage format of variables.	Yes
Enable the caesura menu	Allows the activation or deactivation of menus and buttons to manage the hyphenation.	Yes
Enable the table menu	Enables the activation or deactivation of menus and buttons to manage tables.	Yes
Enable the spell checker menu	Enables the activation or deactivation of menus and buttons for the spell checker.	Yes

The Document library view of KSL Office

The Document library view is a folder type view created automatically in a profile with 2 default views.


These two subviews are created under the tab:

- The view Search allowing a "general" consultation of archived documents.
- The view Document library that allows the interactive archiving of an external document.



These subviews are automatically completed in the KSL Office portal with additional tabs when a KSL validation circuit (workflow) and predefined queries are defined. Each new tab has the name of the Button label parameter of a predefined query. These new views are displayed automatically and do not appear in the KSL Admin configuration of the office profile.

This view will be active if the project specifies that it uses archiving and if the user or his group has the necessary permissions to access documents.

 The following elements are potentially archived:

- Single documents created by KSL in a final format, in PDF format for example,
- Documents being personalized via the interactive document editor or entering in a validation cycle (KSL workflow),
- Documents stored in a technical queue, pending a post-production process, such as bundling (grouping of documents),
- A batch of directly printable documents.

The button  allows to manage the parameters of each view that looks like below:

 A screenshot of the 'View configuration' dialog for 'Search from profile RH'. The dialog has a title bar and a 'General' section. Below the section, there is a table with three columns: 'Property name', 'Property description', and 'Property value'. The table contains two rows: 'Page title' with description 'Page Title associated with this view' and value 'Set the page title here.', and 'Project' with description 'View project' and value 'GESTION_RH - 1.0 - Production'. At the bottom of the dialog, there are two buttons: 'Back to profiles list' and 'Back'.


Configuration parameters  of the Search view:

Parameters	Description	Default values
Page title	Page title associated to the view.	Search
Project	Project on which the view will be based.	The default project of the current profile or the project on which profile was created

Configuration parameters  of the Document Library view:

Parameters	Description	Default values
Page title	Page title associated to the view.	Document library
Project	Project on which the view will be based.	The default project of the current profile or the project on which profile was created

The Style sheet view of KSL Office

The tab Style sheet is a view that allows you to manage Style Sheet components. The button  allows to manages the view parameters.

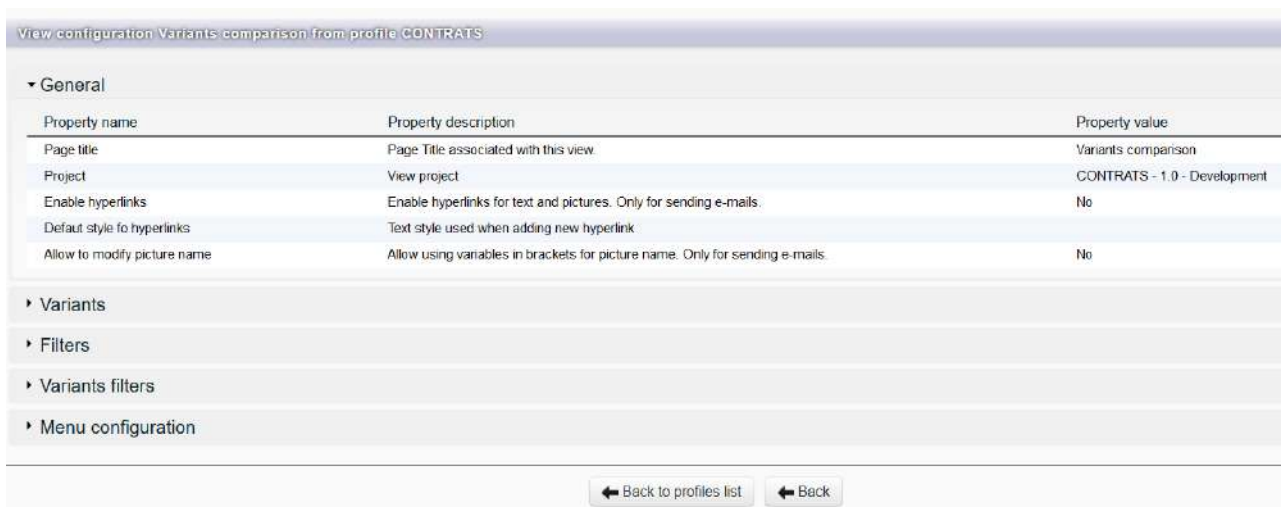


Configuration parameters  of the Style sheet view:

Parameters	Description	Default values
Page title	Page title associated to the view.	Style sheet
Projet	Project on which the view will be based.	The default project of the current profile or the project on which profile was created
Filter : display also read-only style sheet	Displays read-only and editable style sheets.	Yes

The Comparison of group and text zone variants view of KSL Office

The Comparison of group and text zone variants button allows to create a tab Variants Comparison. This tab is a view that allows to compare the different variants of text zones and groups for translation purposes.




Configuration parameters  of the Comparison of group and text zone variants view:

Parameters	Description	Default values
------------	-------------	----------------

Parameters identical to those in the KSL office Repository view.

The Dictionary view of KSL Office

The button Dictionary allows to create a tab Dictionary. This tab is a view that allows you to manage translation tables of KSL labels. The button  manages Dictionary view parameters.

View configuration Dictionary from profile CONTRATS

▼ General


Property name	Property description	Property value
Page title	Page Title associated with this view	Dictionary
Project	View project	CONTRATS - 1.0 - Development

← Back to profiles list ← Back

Configuration parameters  of the Dictionary view:

Parameters	Description	Default values
Page title	Page title associated to the view..	Dictionary
Project	Project on which the view will be based.	The default project of the current profile or the project on which profile was created

The Post-Office view of KSL Office

The button Post-Office allows to created a Post-Office tab. This tab is a view specific to KSL Post. The button  manages the view parameters.

View configuration Post-Office from profile RH

▼ General


Property name	Property description	Property value
Page title	Page Title associated with this view	Post-Office
Project	View project	GESTION_RH - 1.0 - Production

← Back to profiles list ← Back

Configuration parameters  of the Post-Office view:

Parameters	Description	Default values
Page title	Page title associated to the view..	Post-Office
Project	Project on which the view will be based.	The default project of the current profile or the project on which profile was created


c. Customize the KSL Office portal

The KSL Office user interface can adopt your colors and your logo and thus adapt to your company or business application that requests it. It is also possible to change the link of the help button .


Note: each view in KSL Office can also be called without the top banner in which the logo is located; in this way, the views are displayed in full page and can be integrated into iFrames in your business applications.

This setting of colors, logo and help button is done by clicking the button Configuration of the profile in the screen that lists the profiles.

Two sections are provided:

- **General** : that allows to specify the default project of the profile and the information link of the button .

Configuration of Profile - COMMERCIEL_OLD		
▼ General		
Property name	Property description	Property value
Default project	Default project to be used by views.	COMMERCIAL_NAELAN - 1.0 - Development
Information link	Information link to a personalized location. Go to the Ksl Office documentation by default.	help/help_office_FR.pdf

Parameters	Description	Default values
Default project	Default project possibly used by views.	
Information link	Web address of button  from the Office application to a custom destination.	Address of KSL office documentation: help/help_office_FR.pdf

- **Appearance**: that groups the configuration parameters for the logo and colors of the Office portal.

Configuration of Profile - COMMERCIEL_OLD		
▶ General		
▼ Appearance		
Property name	Property description	Property value
Logo URL	URL can be relative to KSL Office (ex. /img/logo.jpg) or absolute (ex. http://www.example.com/my-logo.jpg). Maximum picture height is 115, otherwise icon will be resized.	/img/logo-transp.png
Main color	Main color used with different transparency levels. Color must be in hexadecimal format (ex. #f3399)	<input checked="" type="checkbox"/> #585752
Left side menu color and font color of active tabs	Left side menu color and font color of active tabs. Color must be in hexadecimal format (ex. #f3399)	<input checked="" type="checkbox"/> #f19107
Background color	Background color. Color must be in hexadecimal format (ex. #f3399)	<input type="checkbox"/> #edf1f2
Main text color	Main text color. Color must be in hexadecimal format (ex. #f3399)	<input checked="" type="checkbox"/> #002029
Top menu color	Top menu color. Color must be in hexadecimal format (ex. #f3399)	<input type="checkbox"/> #FFFFFF
Default project	Default project to be used by views.	COMMERCIAL_NAELAN - 1.0 - Development

[← Back to profiles list](#)

Parameters	Description	Default values
------------	-------------	----------------

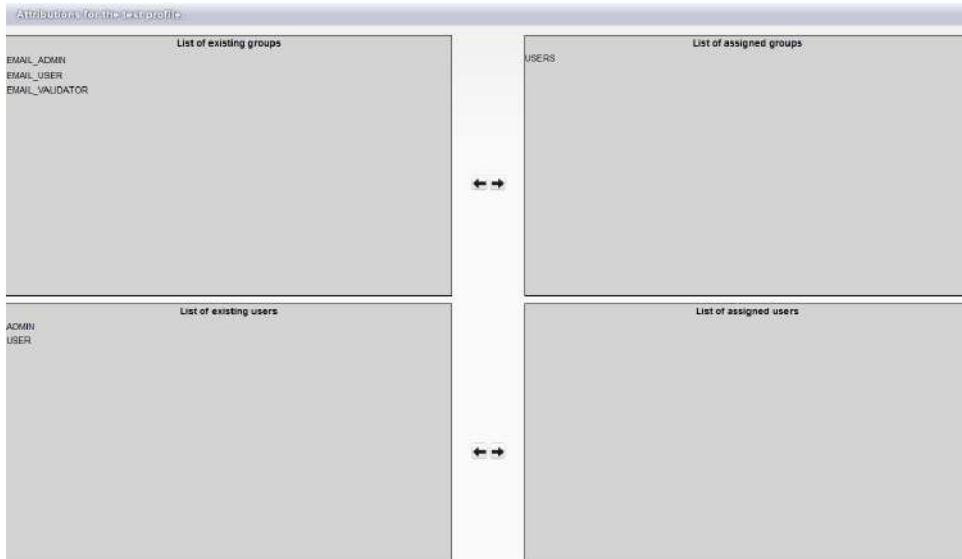
Logo URL	The URL can be either related to the KSL Office application (example: /img/logo.jpg), or absolute (example : http://www.example.com/my-logo.jpg). The maximum height of the image should be 115px, otherwise the icon will be resized. A relative address can also be specified (example : ../logos/MyLogo.png).	/img/logo-transp.png
Main color	Background color of headers and buttons. The color must be in hexadecimal format (e.g. #ff3399)	#403F3D (dark grey)
Left side menu color and font color of active tabs	Background color of the active view. The color must be in hexadecimal format (e.g. #ff3399)	#C6502C (orange)
Background color	Page background color. The color must be in hexadecimal format (e.g. #ff3399)	#F8F8F3 (blanc cassé)
Main text color	Main text color. The color must be in hexadecimal format (e.g. #ff3399)	#002029 (gris très foncé)
Top menu color	Color of top header. The color must be in hexadecimal format (e.g. #ff3399)	#FFFFFF (blanc)
Default project	Default project possibly used by views. This parameter is interesting when the profile is attached by default to a project and all views that are to be created are linked to that other project.	


d. Give permissions to users


The button Attribution allows to configure for define the users and groups authorized to use the Office profile.

It gives access to the page which defines which users and/or groups will be able to see and use this profile.

In order to access the KSL Office portal, a user must be assigned (directly or by his group) at least one profile. If he has several assigned, he can choose which profile to use (and therefore which views to access) directly in Office.



To attribute permissions, select groups or users in the two left lists and click the button  to add them in the right areas which lists attributed permissions. If a user belongs to a group already in one of the right area, then it is not necessary to add him.

A reverse procedure is used for removing permissions to a group or user, by selecting a group or user on the right and clicking the button .

2.2. Documentary production Services and parameters

The Document production view allows to access to the document or composite services available in the server. The document can be launched in a simple transactional or interactive mode.

In both cases, the user accesses a screen to enter the functional parameters, mandatory or not, for running his services. This screen can be defined in Ksl Admin for each service in the sub-menu Services of the Services menu option.

This "Service list" page displays the services with their functional parameters.

The type, length and mandatory characteristic of a document service are inherited from the edition created in Ksl Studio.

a. Naming and ordering input parameters

The screenshot shows the 'Parameter details' form for the parameter 'P_EntrepriseCP'. The form is titled 'Parameter details.' and includes the following fields and options:

- Service :** Offre_Assurance
- Description :** Commercial proposition for a B2B healthcare insurance
- Name :** P_EntrepriseCP
- Description :** Enterprise - Postal code
- Type :** Character
- Maximum length :** 50
- Default value :** (empty text box)
- Display order :** 12
- Mandatory :** No
- Value must be included in list :**
- Default value cannot be modified :**
- Do not overwrite default value on import :**
- Display parameter in Ksl Office :**
- Add a browse button in interactive document edit mode :**
- XML file containing list of values :** (empty text box)

At the bottom of the form, there are three buttons: 'Values', 'Apply', and 'Back'.

This page allows to:

- personalize the parameter label
- define the display order on the input page
- define if the parameter has to be displayed or not
- define a default value, a list of value (see below) or a list of value available in an external XML file
- add "Browse" buttons when it is necessary for the user to specify a file (e.g. list of customers' addresses)

b. The list of values

It allows to present a list of value to the user for a parameter. Each value can be presented by functional label (e.g. the list will present "Yes" and "No" for the value 1 and 0).

c. Permissions

The user or his group must have some permissions in order to access to the services; these permission are set on the component tree of the repository where the production services are classified, thanks to Ksl Admin menu: *Permissions > Services*.

The screenshot shows the 'Service permissions' table. The table has columns for 'User/Group', 'Location', 'Create', 'Edit', 'Delete', 'Execute without personalization', 'Execute with personalization', and 'E-mail creation'. The table is filtered by 'User/Group' and 'Location'. The table shows 1 row of data.

<input type="checkbox"/>	User/Group ▲	Location	Create	Edit	Delete	Execute without personalization	Execute with personalization	E-mail creation
<input type="checkbox"/>	ADMINISTRATEURS*	/HEALTH CARE MUTUAL	✔	✔	✔		✔	
<input type="checkbox"/>	ADMINISTRATEURS*	/LIFE INSURANCE CONTRACTS	✔	✔	✔		✔	

These permissions can be defined on multiple nodes of the repository, and execution modes can be applied on all the production services classified in a node.

These service permissions and the Office profile attributions strongly impact the service availability to the Document production and Emailing services, provided to the users.

3. The Office application of KSL Office

3.1. Connection to the standalone Office application

The Office application can be opened from any web browser from an URL address (example: https://server:port/ksl_office).

With this address, a user accesses directly to the connection page:



He gives his login name and password. If necessary, he selects the language he wants for the application interface. The Connect button allows him to access to the default view of his Office application profile.

3.2. Direct connection to an Office view

A user can connect directly to a specific view of KSL Office without using the standard Office URL. To do it, a URL is used to specify the view.

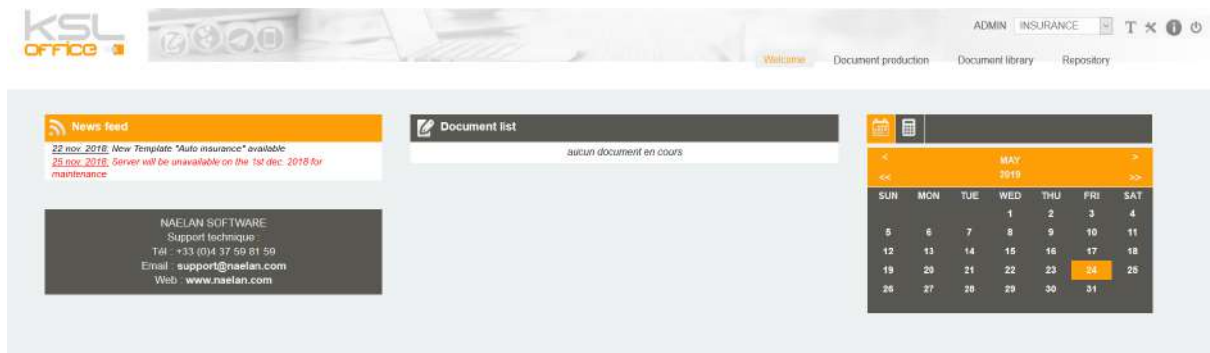
Example:

https://server:port/ksl_office/connecter.do?kslUser=KSL&kslPassword=KSL&kslView=search

The parameters are:

- `kslUser` and `kslPassword` allow to authenticate the user. These two parameters can be replaced by `kslConnectionId` which transmits a unique connection identifier, valid only once; this identifier can be transmitted by the service `GetConnectionId`.
- `kslView` is the unique name of the requested view (this view is specified in the Office profile configuration in Ksl Admin).
- `kslServer` is the logical name of the server. This parameter is optional. If not set, the first server defined in the `web.xml` will be used.

3.3. Welcome page



The Welcome page of KSL Office is a view providing the following functions:

- A "News feed" area which displays the dedicated "ITZ_News" text zone.
- The Document list which lists the "documents in progress"; with a click on a document you can reedit the document and continue its personalization.
- The Widgets "calendar" and "calculator"

a. The News feed area

If you need to add some news or information in this area, for the end-users who access to the project,

- create a text zone with the name "ITZ_News" in the repository of your project; this text zone will be modified only by authorized employees;
- you can customize the size of this text zone to 14 cm, to have a preview of the final display;
- as in any text zone, you can add images, texts and tables.

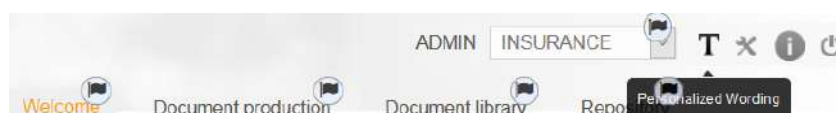
b. This Document list area

This area lists the interactive documents in progress:

- Each document can be selected by a click.
- This list is automatically created when you save an interactive/personalizable document.
- The document disappears from this list when sent or archived.
- This list is also available in the Document production view.

3.4. Customize the Office labels


The configuration menu at the top allows a user with administration rights to customize the different labels displayed in the Office portal.



The selection of the first button of the toolbar ("T") activate the modification mode.



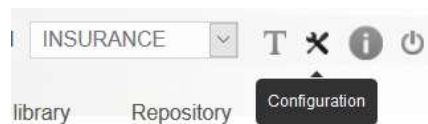
A flag indicator allows to customize a text for the tab label, but also for the action buttons and menus. A second click on the "T" button stops the modification mode.

 This dynamic customization will be saved for all the Office profiles on the server.

3.5. The user configuration

This interface allows a user to modify some of his option.

Click the Configuration icon:



Change the configuration through the following screen:

User profile update

User :	ADMIN
Description :	ADMIN
Language :	English ▾
Existing password :	<input type="text"/>
New password :	<input type="text"/>
Confirmation password :	<input type="text"/>
Groups :	ADMIN
Connection timeout (in seconds) if no activity :	1000
Number of lines per page for list-type screens :	20 ▾
Maximum age (in days) for latest documents :	7
Display completely expanded trees :	<input type="checkbox"/>
Forcing open files without going through the dialog box of the browser (Save or Open?) :	<input checked="" type="checkbox"/>
Display a message while executing a service or an action. :	<input checked="" type="checkbox"/>
Display a message while loading spell check dictionary :	<input checked="" type="checkbox"/>
Show a notification when a file has been produced :	<input checked="" type="checkbox"/>
Show others notifications :	<input type="checkbox"/>

The parameters runs as follows:

- The existing password
- The display mode of information and error messages (On screen / Not displayed)
- The inactive time before automatic logout (a positive value in seconds)
- The number of items displayed in the list type view
- The maximum age in days for the latest documents
 - *Note that this item is active only on document view managed by predefined requests (created in KSL Admin), and only if this user property is used in the display conditions.*
- The default display of the classification tree: the tree structure completely unfolded or folded
- The implicit opening of the produced documents without the browser validation
- The display of a holding message for actions in progress
- The display of a waiting message when loading the language dictionary for the spell checker (not selected by default)
- The display of a notification when a file is produced: a pdf in the interactive document for example.
- The general display of notifications, all informative messages

3.6. Notifications and errors display

These Informations appears at the top right of the screen.

They are classified into 3 categories:

- notifications (information, validation confirmations etc)
- warnings - mandatory display (download links, paths etc)
- errors (fatal, serious, slight, etc.)


For notifications and warnings

- display then progressive disappearance of the window

For "mandatory" errors and notifications

- to close the window, click on a validation button.

The display of notifications can be configured in the user configuration via the checkbox: "Show others notifications". If this checkbox is checked, the notifications will be displayed ; otherwise only mandatory messages and errors will be displayed. The display is checked by default.

 *Attention* ... to an error which can be caused by the systematic access of Office to .plc files (font management). In the event of a missing font, the context is likely to create blockages throughout the operation of the project into Office. In this case, the error is clearly raised and it suffices to integrate the missing font into the .plc already available for the project to be usable again.

4. The style sheet view

4.1. Overview

The Style sheet view of centralizes and organizes all the shared KSL style sheets and allows to create, update or delete them.

The left side displays the tree view of the current project and allows to select or create a style sheet. The right side gives details of the selected style sheets organized by types of element.

6 types of elements are displayed in the Style sheet view:

- colors
- fonts
- patterns
- lines
- bullets
- numbers

Style sheets are components such as text zones and groups, so they are managed in the same way.

4.2. Style sheets management

A style sheet contains a set of attributes applicable to KSL objects: colors, fonts, lines, patterns, bullets, numbering.

The style sheet is applied to a document template, a page form, or a text zone.

It may be:

- internal, i.e. local to a document template, to a page form or to a text zone
- or external, and therefore potentially shareable by all components of a project and saved with a .kss extension file

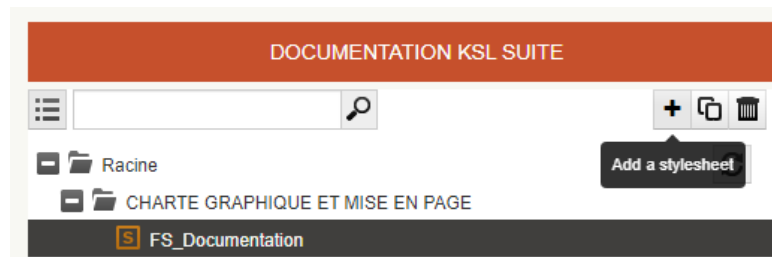
The style sheet is a component and as such can be saved in the component repository.

When you update the style sheet, the main pop-up menu shows all possible actions on the repository:

- add the style sheet to the repository
- check it out
- update it
- release it without changing its repository version

See the chapter concerning the repository for more details.

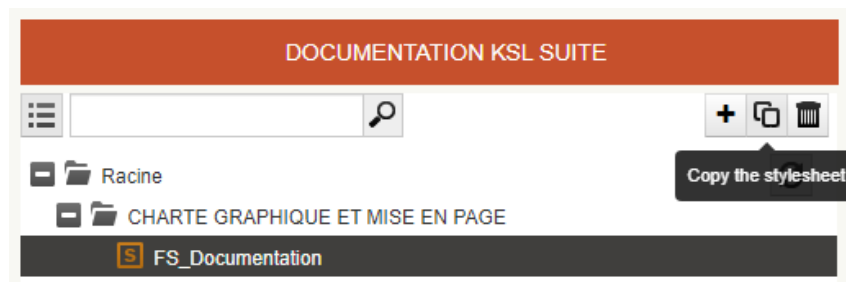
a. Add a new style sheet




The icon "+" is a menu listing the style sheets that the user can potentially add to the repository.

Note that when the user is positioned on a specific branch of the classification tree, the style sheet will be added by default in the selected branch, unless he voluntarily changes its position.

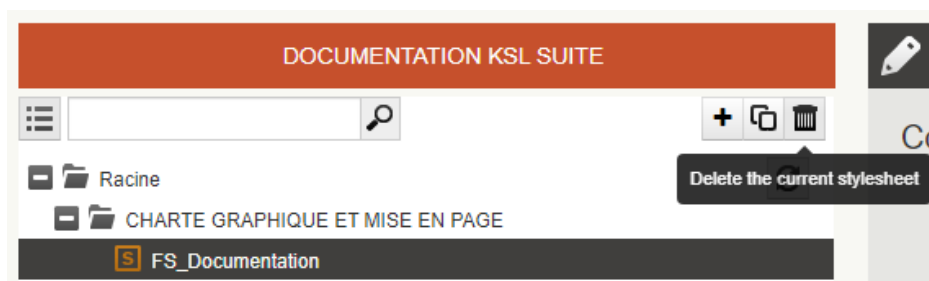
b. Copy an existing style sheet




To duplicate a style sheet, select the sheet of your choice and click on the copy icon .

The style sheet information opens with the possibility of entering a new name and a new label. The filing plan of the original style sheet is proposed by default but it is also modifiable. The content of the original style sheet is fully recovered and editable.

c. Delete an existing style sheet



To delete a style sheet, select it in the repository and click on the icon .

Note that if the style sheet is still used within a document template, an error message will indicate that it is not possible to delete it.

4.3. Management of the style sheet elements

Each style sheet is composed of 6 tabs, each managing a type of element:



In display order: colors, fonts, patterns, lines, bullets and numbers.

Each tab presents

- an element list: list of patterns, list of lines, list of fonts, etc.
- 3 action button: Add, Copy, Remove, associated with this list
- a parameters form associated with each element

Définition of lines

+ [] []

Double
Ombre
Pointilles
PointillesCouleur
Simple
SimpleBlanc
SimpleCouleur

Name* Double

Label* Double

Note that

The action buttons as well as the the parameters form are active only if the style sheet is reserved.

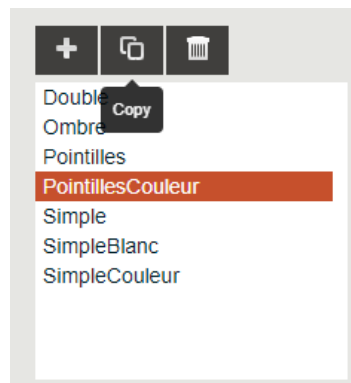
- a. Add a new element to the style sheet



The Add button allows you to create a new element for the tab (a new line for example). There are mandatory parameters on each tab. The user will only be able to confirm if all the mandatory parameters have been entered.

On all the tabs, the name and the label of the element are notably in compulsory input, and the name is a unique element.

b. Copy an element

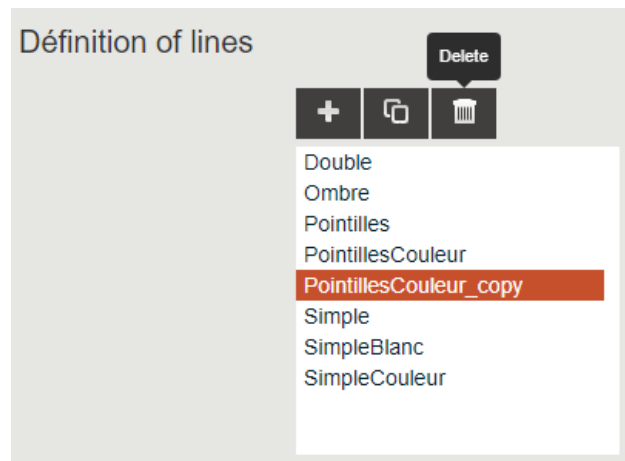


The Copy button duplicates the current element. In this context, the name and the description of the element suffixed by "_copie" are included in the mandatory parameters; they are editable.

Name*	<input type="text" value="PointillesCouleur_copie"/>
Label*	<input type="text" value="PointillesCouleur_copie"/>

The other parameters are fully copied and can be modified.

c. Delete an element



The Delete button allows to delete the current element. This graphic element should not be used in your current or archived documents.

Note that

The Simple line must in no case be deleted; it is the basis for the "underlined" attribute.

5. The Repository view

5.1. Overview

The component repository of centralizes and organizes all the shared resources and allows to create, update or delete them. This resource management can be potentially delegated to business users for a collaborative work.

Le left side displays the tree view of the component classification of the current project and allows to select or create a component. The right side gives details of the selected component.

4 types of components are displayed in the classification tree:

- pictures
- text zones built with texts, pictures and table with a fix number of columns and rows
- groups of text zones, assembling several text zones and external PDF documents
- external files, essentially PDF documents

Some rights can be applied on the classification tree, but also on component types which users can create, modify or delete.

5.2. The classification tree

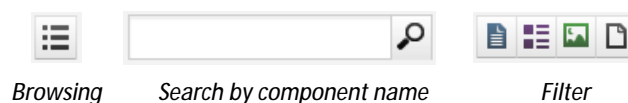
The classification tree (the repository) and its access rights are created with the Ksl Admin administration application.

Only the nodes of this tree which contain components are displayed in the Ksl Office application. Note that when adding or moving components, all the nodes of the classification tree are displayed.

If the classification tree is presented unfolded by default (cf. user configuration) and if it includes a very important number of components, then a message will advise the user to configure a folded presentation by default, so as to limit the waiting time to display all the components.

If the project is configured with variants then text zones and groups of text zone are presented under each other with the value of its variant criterion (French or English on a "language" criterion for example).

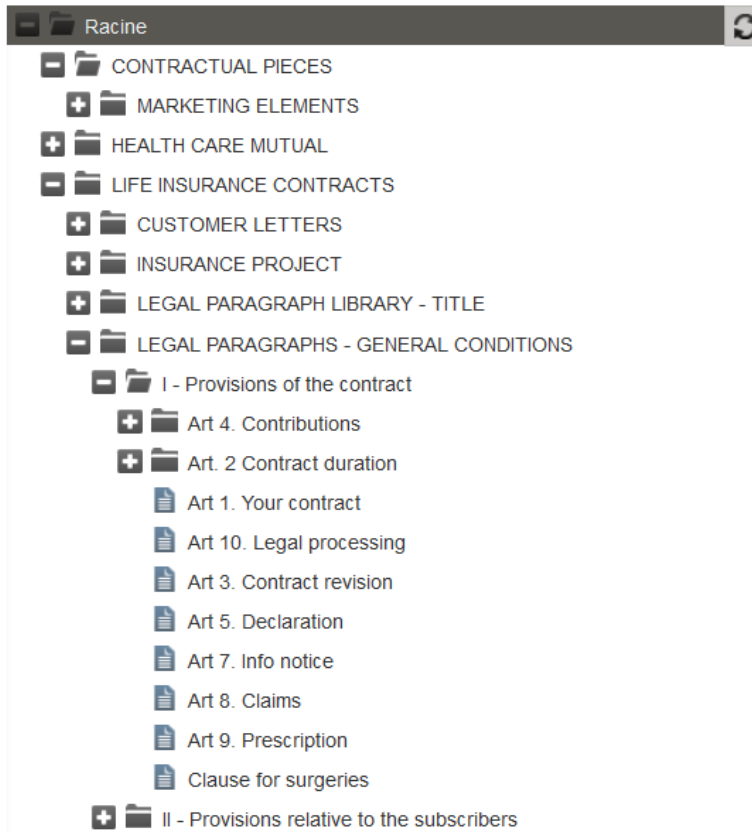
5.3. Search and selection tools



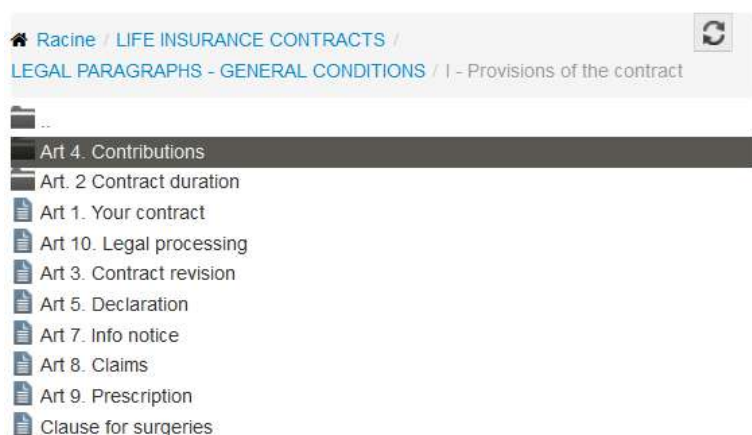
a. Browsing in the repository: tree or list

The first button proposes two display modes for accessing to components of the repository:

- A tree which can be folded or unfolded
- Or a presentation by list which lists the available components and repository (node) for each repository; the exact location is always presented and available from the breadcrumb navigation above the list.



Browsing the tree of the repository



Browsing the directory by lists

b. Searching a component by its name

It is possible to search a component by its label or a part of its label. The components corresponding to the search criteria appearing in their tree structure.

The search is performed both on the label and on the technical name of the component; therefore, there may be a lag between the labels displayed and the search term in the result list.

c. Filtering by component type

The user can click on one or more of the four available buttons to hide the component types for the current search. If he wants to refine his search, the filter selection can be combined with the search by name.

Note: it is also possible to fix the default filter configuration in the Ksl Office profile.

d. Advanced search criteria



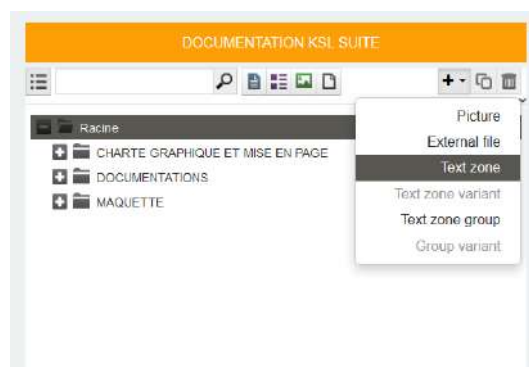
These additional criteria are available by clicking on the down arrow under the toolbar on the right.

Two criteria can be specified:

- a range of dates to select only the modified components between two dates,
- a new search and working root folder for the tree of the repository: a sub-tree folder in which you want to work exclusively.

If the project has variants, it is also possible to filter components by variant (e.g. by agency, country, brand or language).

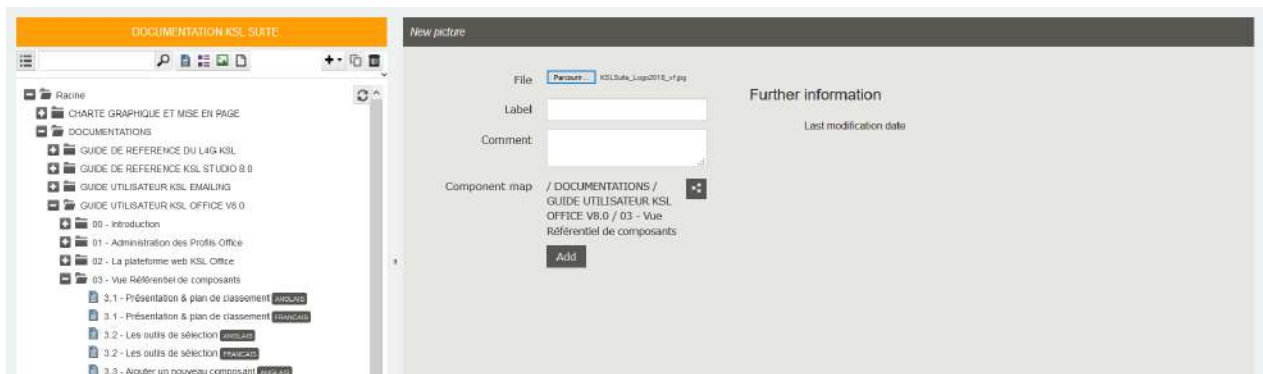
5.4. Adding a new component



The menu "+" lists the component types that the user can potentially add to the repository.

Note that when the user is positioned on a specific branch of the classification tree, the component will be added by default in the selected branch, unless he voluntarily changes its position.

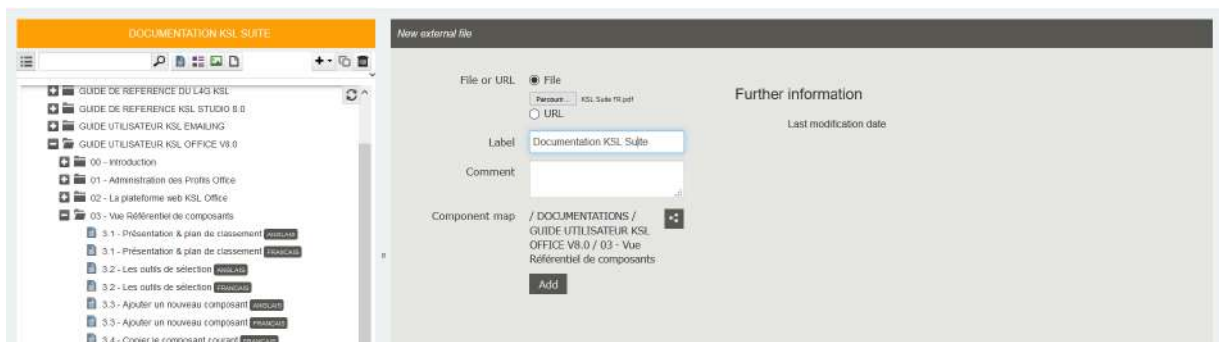
a. Adding a Picture



- A "Browse" button allows to search locally for a picture.
- The Label is the functional name displayed in the classification tree; spaces and accents are accepted
- The Component map icon allows to change the node where the picture is saved; the default location is the one on which the user was positioned when adding the component; click on the component map icon to change the node where the picture will be saved.

The Add button allows to upload the picture from the user's local desktop to the server repository, then to display it in Ksl Office. The label can still be changed, as well as its location in the tree.

b. Adding an External file



External files correspond mainly to PDF documents used as appendixes in the documents produced on-demand or in batch by Ksl. The pages of these external documents can also be inserted in groups of text zones.

- The "browse" button allows to search for a file on the local disk available on the user's desktop
- It is also possible to define this file via an URL if it is stored on Internet or in another internal web application. Defining this address allows to use dynamic documents, i.e. documents changing regardless of the KSL repository, or external documents produced dynamically by another application. In these cases, the document can be called by a KSL process by its technical name (Name field). The URL field is an http address (i.e. http://...).
- The Label is the functional label of the file appearing in the classification tree.

- The default location node used to save the file is the one on which the user is positioned; the user can click on the classification scheme icon to change the file location node.

c. Adding a Text zone

A text zone is a component containing:

- Text content: titles, paragraphs
- Tables
- Pictures
- Variables

The screenshot shows a 'New text zone' dialog box with the following fields and options:

- Component**
 - Name: [Text input field]
 - Label: [Text input field]
 - Comment: [Text area]
- Component map**: / DOCUMENTATIONS / GUIDE UTILISATEUR KSL OFFICE V8.0 / 03 - Vue Référentiel de composants [Tree icon]
- Variant criteria**: Language [Dropdown menu]
- Variant properties**: To be customized
- Add** button

- The Name field allows to define the technical name of the new text zone.
- The Label field is the functional name appearing in the classification scheme; spaces and accents are accepted
- The default branch of the classification tree is the one on which the user is positioned; the user can change this classification location by clicking on the tree icon.
- If the text zone has variants (languages, agencies, dates,...), then the variant criterion can be selected. If this text zone modification is required during an interactive edition of the document, then the "to be customized" option must be selected.

The Add button allows to edit the text zone and to create or modify it (see also the "Text zone editor" chapter for more details).

d. Adding a Text zone variant

This option is only available in the Add menu (+) when you manage variants (multilingual or multi-agency for example) in your text zone and group.

It is possible the option to be grayed out

- if all variants of your text zone have already been created
- if you do not have sufficient authorizations to create a variant on a new criterion

You can add a new text zone variant from the component repository by being positioned on the reference text zone.

- The Variant criteria field allows to select the value of the variant criteria for the new text zone variant.
- If this text zone modification is required during an interactive edition of the document, then the "to be customized" option must be selected.
- The "Copy the content of the reference variant" option allows to copy the content of the reference text zone into the new text zone variant.

However, it is more user-friendly in the context of the variants to use the "Variants comparison" view where the reference variant and the new variant are presented side by side.

e. Adding a Text zone group

A text zone group is a complex component assembling:

- Sub-groups
- Text zones of the repository
- Text zones local to the group, i.e. created only for the group in which it has been created

- External files (external pdf files)

A Text zone group is used as a full-width part of a final document (see also the chapter "Group editor" for more details).

- The Name field allows to give a technical name to the new group.
- The Label field is the functional name appearing in the classification scheme; spaces and accents are accepted
- The default branch of the classification tree is the one on which the user is positioned; the user can change this classification location by clicking on the tree icon.
- If the group has variants (languages, agencies, dates,...), then the variant criterion can be selected.


The Add button allows to edit the text zone group and to create or modify it.

f. Adding a Group variant

It is possible to add a new Group variant from a reference group: the Name and Label are the same, but the variant criteria has to be selected.

To be consistent, this Group variant component has to be created with Text zones with the same variant criterion (Text zone variants "ENGLISH " in a Group variant "ENGLISH" for example).

5.5. Copying an existing component

To duplicate a component, select the text box or group of your choice and click on the copy icon .

The duplication of a component is an action applicable to Text zones and Text zone groups.

The component details view opens


- By default, the name and the description of the original component are used with a suffix "-copy"; they

remain editable

- by default, the classification plan of the original component is also adopted and it can be modified
- the rest of the information (comment, mandatory personalization and variant) must be completed in the same context as a creation.

Add opens the edit text box; the content of the original component has been fully recovered.

5.6. Deleting an existing component

To delete a component, select it in the repository and click on the icon .

However, if the component is still used by a document template or by a more complex component (i.e. a Picture component for a Text zone / a Text zone component, a Group component or an external file component a Text zone group), then an error message will be displayed informing the user that the deletion is not possible and giving the name of the complex component that uses the component.

Note that the edition templates using the components are listed in the information view of the component under the title "Impacted document models".

5.7. View and modify a component

Select a component in the repository tree by using the search bar and/or filters. The content of the component on which you are positioned is immediately displayed.

The following actions are possible when editing any component of the repository:

- Moving it in the repository tree; this action is conditioned to the user's rights
- Renaming the component: only its Label can be modified

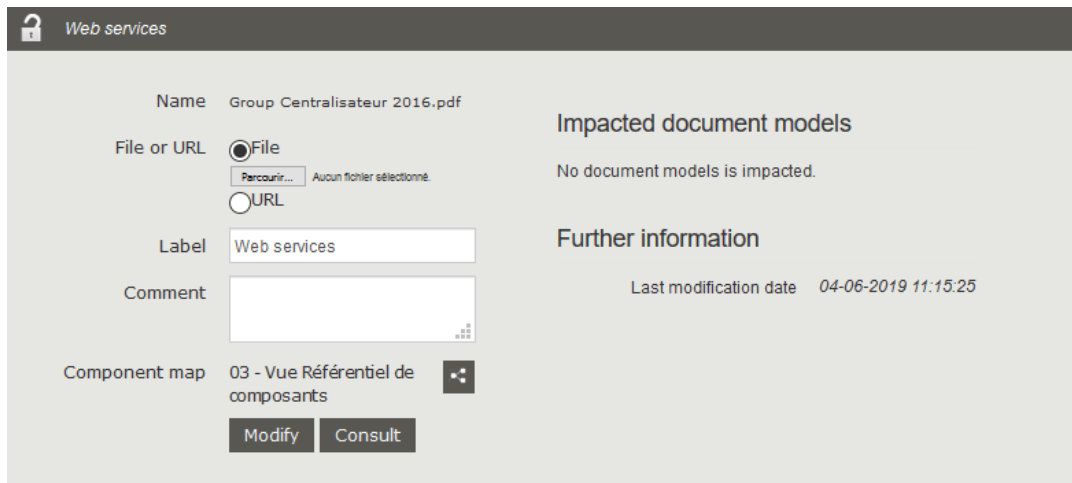
a. Modify a picture

When editing an existing picture, its image can be changed by clicking on *Browse* and selecting another image file.



b. Modify and view an external file

You can modify the external file associated to component of the repository.
You can also view it if you have the appropriate editor for the file format.



Web services

Name Group Centralisateur 2016.pdf

File or URL File
 Percourir... Aucun fichier sélectionné.
 URL

Label Web services

Comment

Component map 03 - Vue Référentiel de composants

Modify Consult

Impacted document models
No document models is impacted.

Further information
Last modification date 04-06-2019 11:15:25

c. Modify a text zone or a group

Text zones and groups are components that appear in preview mode when selected.
There are several specific actions on these components:



Allows to access to the informations of the component and to modify its classification and label.



Allows to edit the component; this action automatically locks the component.



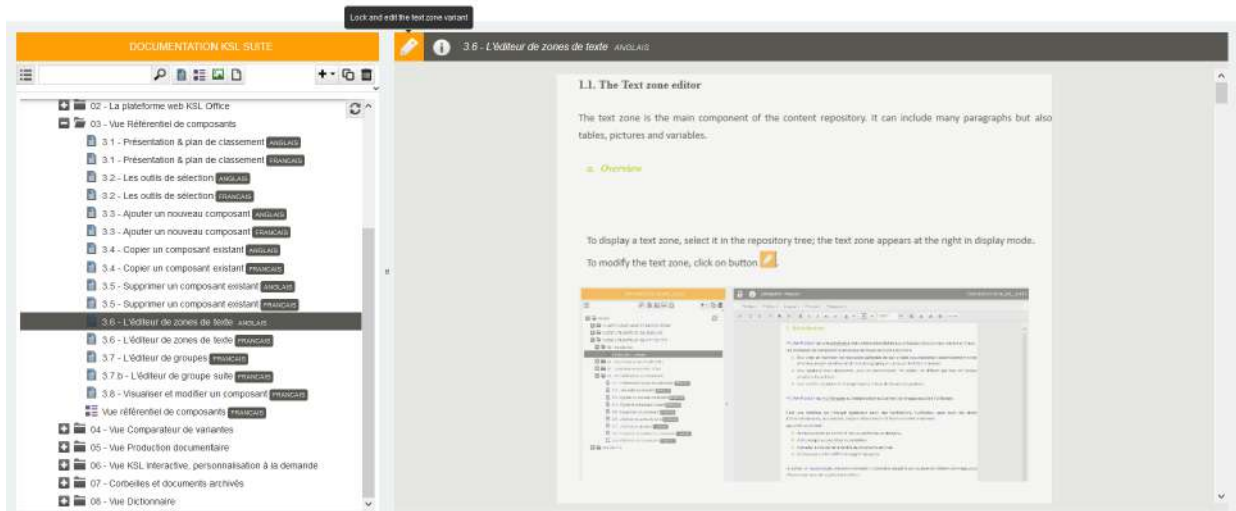
Unlocks the component after modification.

The two last actions secure collaborative work: only one user can edit a component at the same time.
After edited and unlocked, a text zone is available for another edition. However, during edition, the component remains viewable by other users.


5.8. The Text zone editor

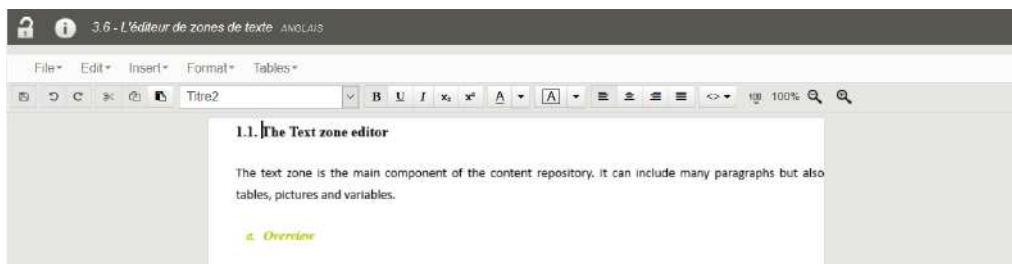
The text zone is the main component of the content repository. It can include text paragraphs but also tables, pictures and variables.

a. Overview



To display a text zone, select it in the repository tree; the text zone appears at the right in display mode.

To modify the text zone, click on the button .



The editor behaves like a standard text editor with a toolbar to:

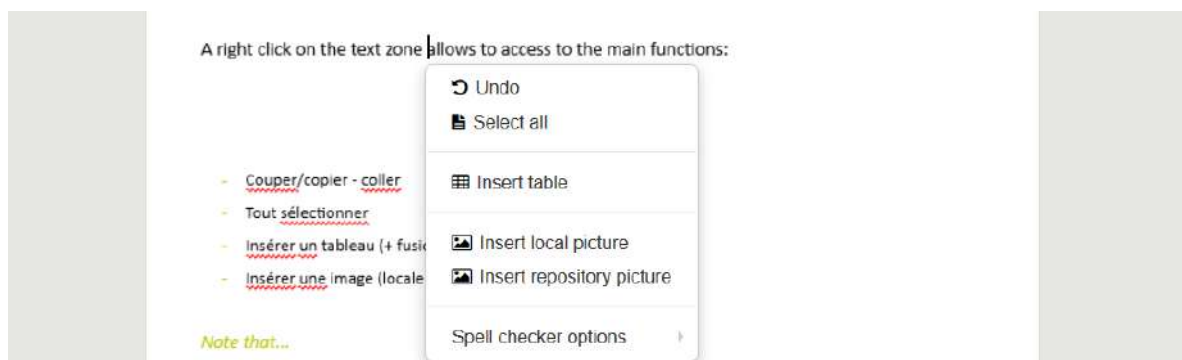
- save the text zone
- undo the last actions
- copy - Paste elements
- apply a text attribute (bold, underline, italic)
- change the text or the background color
- use the styles defined in the style sheet of the text zone
- position elements in the text zone
- add a variable in the text zone from a list of variables

The menu presents the following items:

- File: save, change the layout and the style sheet
- Edit: undo/redo, copy/paste/cut
- Insert: declare/add variables to the list of variables available in the toolbar, insert picture
- Format: apply a text attribute like bold, underline, italic, but also subscript and superscript, define the borders and the shadings, the paragraph properties, the bullets and the numbering and the caesura
- Table: insert/remove a table, a line and column, merge and split cells, change the properties of the table and the cells, set the adaptation and alignment properties

A right click on the text zone or a picture allows to access to the main functions:

- Undo
- Select all
- Insert a picture (selected locally in your system or selected in the repository)
- Insert a table
- Merge/Split cells of a table
- Insert a paragraph before/after a table
- Access to the Picture properties to modify the dimension of a picture
- Change the language for the spell checker
- Select a word proposed by the spell checker
- Add a word to the personal dictionary of the spell checker



Note that...

The "Right-click + Insert repository picture" allows you to preview the picture before inserting it.

b. Page layout

The default Page layout of the text zone is defined at the project option level (KSL Admin). But this is only a default value and not a reference one: changing the option values in a project will not affect the existing text zones.

Note that...

The Page layout of a text zone is controlled by the document template that uses it; so the text wrapping is automatically applied according to the document target size

Exception: if the text zone includes tables, then these tables will be truncated if they are wider than the width of the document. It may be necessary to review the dimension of these tables, for example if they are used in a landscape document.

File / Page layout

Page layout ✕

Paper size Standard
 Format A4 (21 cm * 29.7 cm) ▾

Custom
 Width 21 cm ▾
 Height 29.7 cm ▾

Orientation Portrait
 Landscape

Left margin 1.5 cm ▾
 Right margin 1.5 cm ▾
 Top margin 1.5 cm ▾
 Bottom margin 0.7 cm ▾

Cancel Ok

Note that...

In the property boxes, the units (cm in our example) present inside the fields must not be modified. In the event of untimely modification, they will be displayed again.

c. Style sheet

Usable styles are imposed by the style sheet of the project (Project Options in Ksl Admin) and thus, they are imposed by default to the text zones of the project.

It is possible to have multiple style sheets defined in the same project, especially when the company has "multi-agencies" or "multi-brands" documents with multiple style sheets

To modify the default style sheet of the project for a text zone, use the following option :

File/Style sheet

Style sheet choice ✕

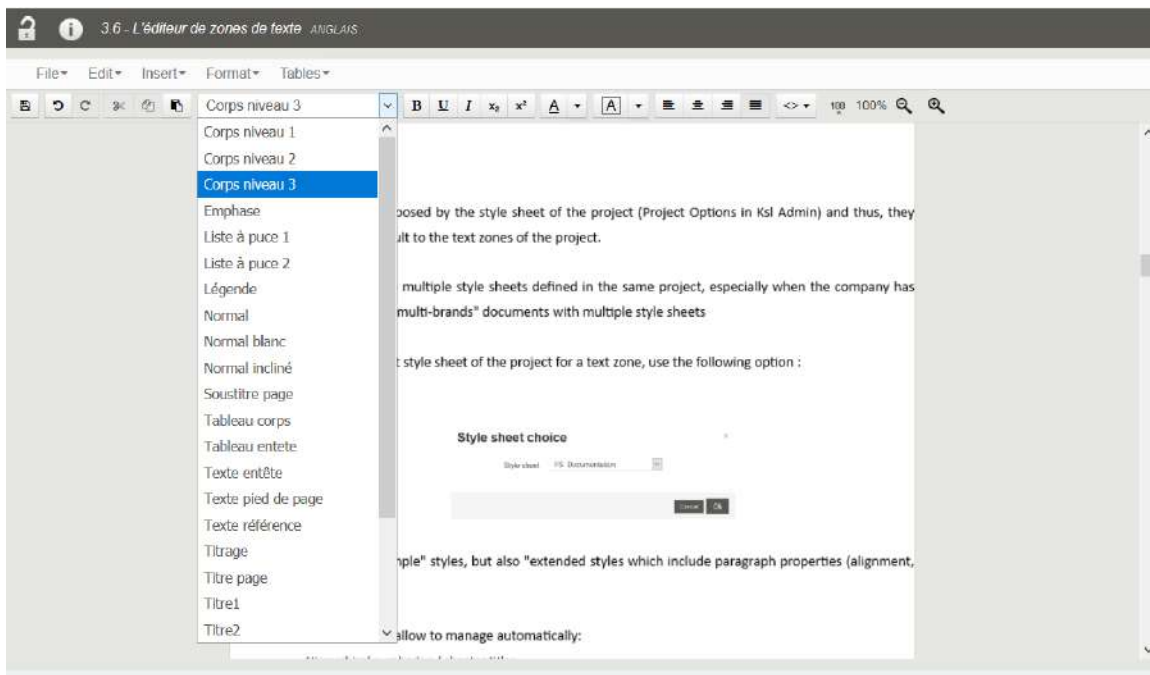
Style sheet FS_Documentation ▾

Cancel Ok

The list provides "simple" styles, but also "extended styles which include paragraph properties (alignment, indents, numbering).

The extended styles allow to manage automatically:

- Hierarchical numbering / chapter titles
- The paragraph styles following a paragraph or title
- Bullets

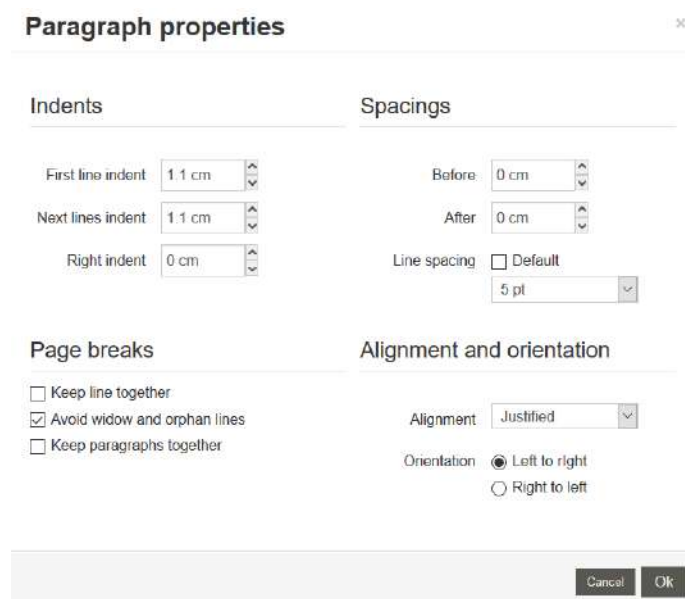


Some text properties can be override:

- The bold, underline and italic attributes
- The text color and text background color

...as well as the paragraph properties.

Format/Paragraph



The default values are the values of the style sheet.

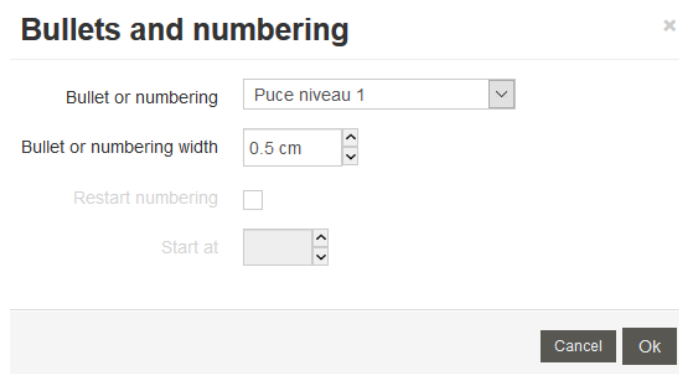
The *default value* for line spacing allows document template to control the line spacing.

The *Page breaks* options will be useful when producing the document: they will allow to perfectly present the text content when an automatic page break:

- *Keep line together*: a page break will occur only between two paragraphs. A paragraph cannot be cut. It will be completely carried on the next page.
- *Avoid widow and orphan lines*: the last line or the first line of the paragraph cannot be isolated on a page when a page break. The paragraph will be completely carried on the next page.
- *Keep paragraphs together*: two following selected paragraphs won't be separated when a page break. They will completely be carried on the next page. (example: a title with its following paragraphs)

Existing *Bullets and numbering* cannot be modified.

Format/Bullets and numbering



Bullets and numbering x

Bullet or numbering: Puce niveau 1

Bullet or numbering width: 0.5 cm

Restart numbering:

Start at: [Spinner]

Cancel Ok

Bullets and numbering are initially defined in a style sheet. The *width* defines the space between the bullet or numbering and the following text; note that a systematic check is done to avoid a character overlap if the width is too small.

The numbering of titles can be reinitialized during the document generation.

When generating a document, the value of the title numbers depend on the other titles with the same numbering and the same hierarchical level located before in text zones.

The background color and the borders of paragraphs can also be modified with the menu below:

Format/Borders and shading

Borders and shading ×

border

Left inner margin

Right inner margin

Top inner margin

Bottom inner margin

Pattern

Apply to

The borders and patterns available in the lists of the window are also predefined styles items of the style sheet. They are applicable to a paragraph or to the complete text zone.

d. Inserting tables

The editor allows to insert one or more tables in the text zone.

Position the cursor where you want to create the table and select *Tables/Insert/Insert table* in the menu.

The table can also be created by a right-click + Insert table.

Add table ×

Number of columns

Number of lines

Kind of table Fixed column width
 Dynamic column width

The table window allows to define the number of columns and lines for the table.

Some other characteristics can be defined when creating a new table:

- If the columns have a fixed width: each column will have the same width and the table is created by default with the maximum width managed by the text zone,
- If the width of the columns is adapted to the content: in this case the columns are created with the minimum width and the width depends on the content you insert in each column.

Dynamic column width				

	Fixed width			

It is still possible to modify the width of each column by moving the vertical borders to the right or to the left.

Table/Table properties

Table properties ✕

Table position

Table is centered in the page

Spacing to the left of the table

Space before table

Space after table

Table splitting

Table can be split by page break

Allow splitting cells

The table properties allow to define its positioning in the text zone: centered in the page, with spacing before/after the table, as well as the possibilities to split the table/cells on page breaks.

Table/column width

Column width ✕

Column 2

Width

The width of a column can be adjusted precisely after the table is created. It is also possible to select a set of columns and to give them the same dimension.

You can apply predefined borders and patterns styles to all or part of the table, by selecting one or more merged cells, one or more borders, or one or more columns, or the entire table with the following menu option.

To delete targeted borders or patterns on a set of cells, select "without line" or "without pattern" from the lists provided.

Table/Celle properties

✕

Cell properties

Cell left border

Cell right border

Cell top border

Cell bottom line

Pattern

Cell inner left margin

Cell inner right margin

Cell top inner margin

Cell bottom margin

Vertical alignment

Apply to

For example, the table below can be formatted with the following actions :

Items	Qty	Unit price (VAT excl.)	Total (VAT excl.)	VAT code
<i>Recycled paper</i>	10	11	110	2
<i>210 gr. standard paper</i>	10	21	210	2

- Select the table and apply green borders to the cells
- Select the header line and apply a green pattern to the cells
- Select the 4 horizontal cells of the header and apply a right white border to them
- Apply the right colors to the texts

Note that...

it is also possible to use tables to create parallel items (e.g. images); in that case create a table without ant border; no border will appear in the final document, but the borders will be dotted lines in th editor.

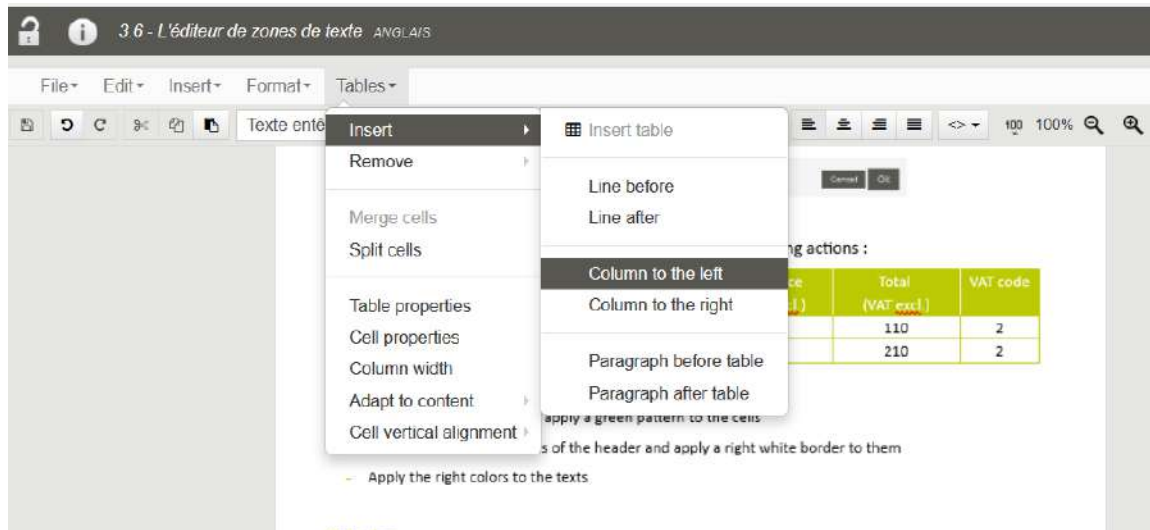
To insert new rows or columns, delete, align, merge or split cells:

- Position your cursor in the table or select cells,
- Use the *Tables/Insert* menu,
- then select one of the listed action

Tables/Insert/Paragraph before table or Paragraph after table

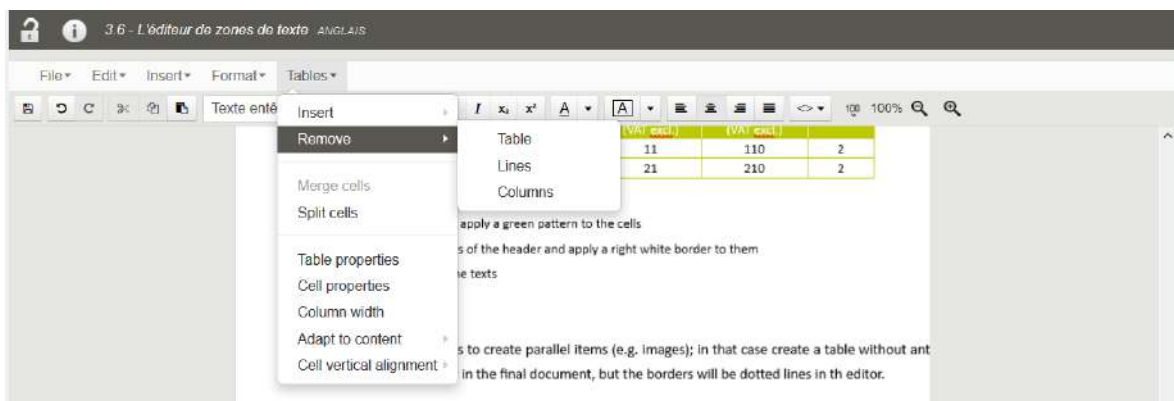
These actions allow to insert items before the table (above) if the table has been created at the top of the text zone, or after the table if the tableau has been created at the bottom of the text zone.

These two options are also available for quick access on the right-click menu of the table.



Tables/Remove/Table, Lines or Column

To delete a row, column, or table, position the cursor on the items to be deleted and select the Remove menu action.



Tables/Merge cells

To merge cells, select some cells, consecutive vertically and horizontally, and select the Merge menu action.

Tables/Split cells

To merge a cell, select the cell and select the Split menu action and the new number of columns or lines required.

Tables/Cell vertical alignment/Top Middle Bottom

To align vertically the content of cells, select the cells and this menu option.

e. Search & replace

Edit/Search



Search brings up a search bar under the toolbar; the latter allows to condition the search and to navigate in the content

- Match case: if checked, strict respect of upper and lower case letters entered
- Whole word: if checked, the isolated word is sought; otherwise, any expression or word that contains the entered term will be searched
- Loop allows implicit browsing of content for research

When you have entered the content of the search,

- click on the down browse arrow to start the search
- search terms are highlighted in yellow in the text
- click on the down arrow or the up arrow to browse the search results

Note that

in the input combo box, with the down arrow, you will have a list of your last searches if you want to use it again.

Edit/Replace



Replace shows the replacement bar above in addition to the search bar.

It allows the search term to be replaced by the new term entered,

- by unit, browsing the content and clicking on Replace
- or in full by clicking on Replace all

Note that

You can always go back to "Replace all" using the Undo button on the toolbar.

f. Inserting a picture

This action is available from the Insert menu or with right-click.

A picture can be inserted from the local workstation or from the component repository.

A local picture is transferred from the user's workstation to the server and inserted in the text zone; take care of the picture size, because the browser will be blocked during the transfer. The picture will be considered as local to the text zone (not shared with other text zones).

The maximal size of the pictures can be configured at the project level.

The picture size can be changed after insertion, with the mouse by positioning the cursor on a right angle (up or down). Simply pull the angle inward or outward to reduce or increase the picture size.

A right-click + Properties on the picture also allow to change the picture size:

- Either with the width/height size
- Or with a zoom ratio

Picture size

Maintain the proportions

Zoom 58 %

Width 8.22 cm

Height 5.5 cm

Cancel Ok

Note that...

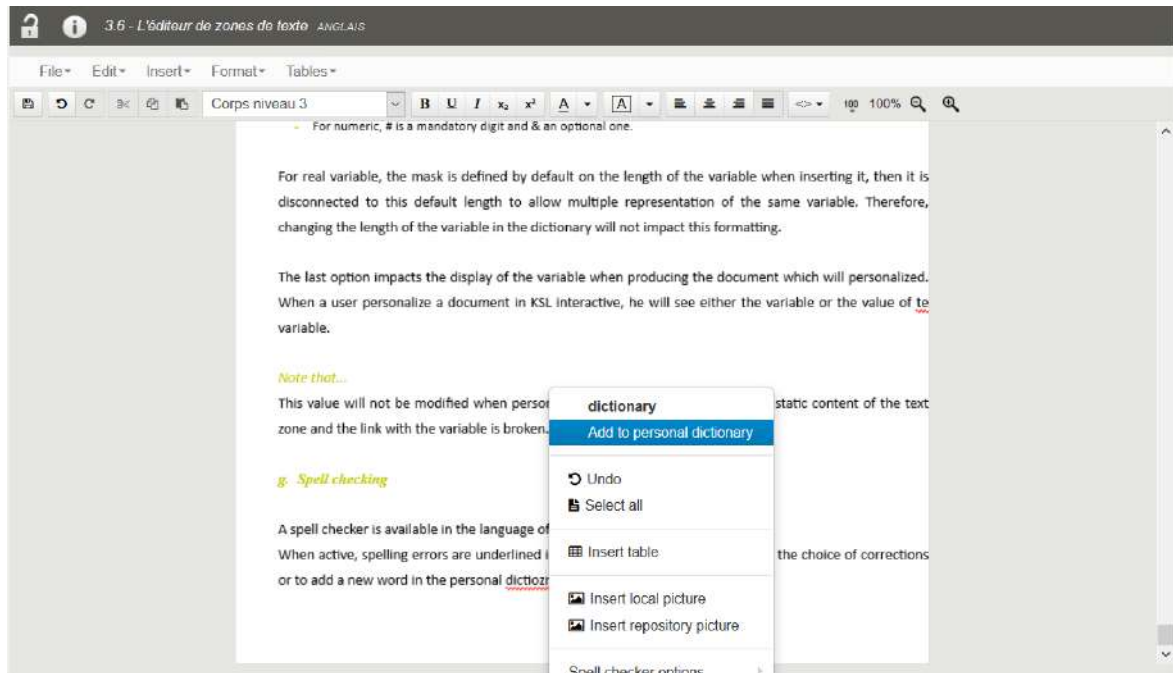
If you want to present a picture and a paragraph in parallel, create a table without borders and adjust their alignment, spacing and positioning



g. Spell checking

A spell checker is available in the language of the KSL Office interface.

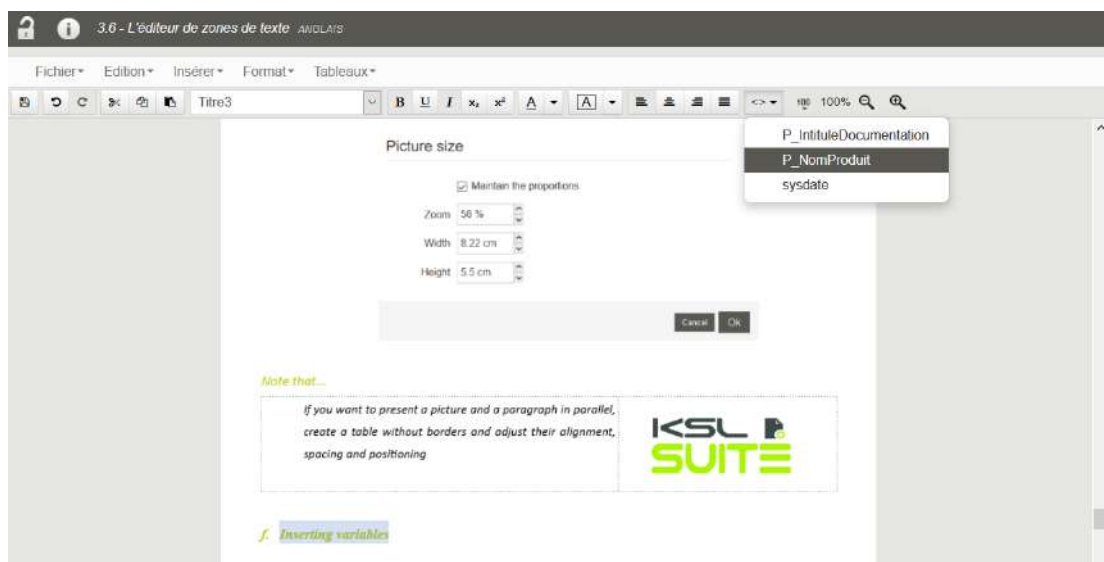
When active, spelling errors are underlined in red and a right click gives access to the choice of corrections or to add a new word in the personal dictionary.



h. Inserting variables

You can add variables to a text zone by using the list of variables available in the toolbar. It is necessary, beforehand:

- to declare these variables for this text zone: *Insert /Declare variable*
- and that these variables get a value via the document templates which use this text zone (data stream, parameters, system or calculated variables).

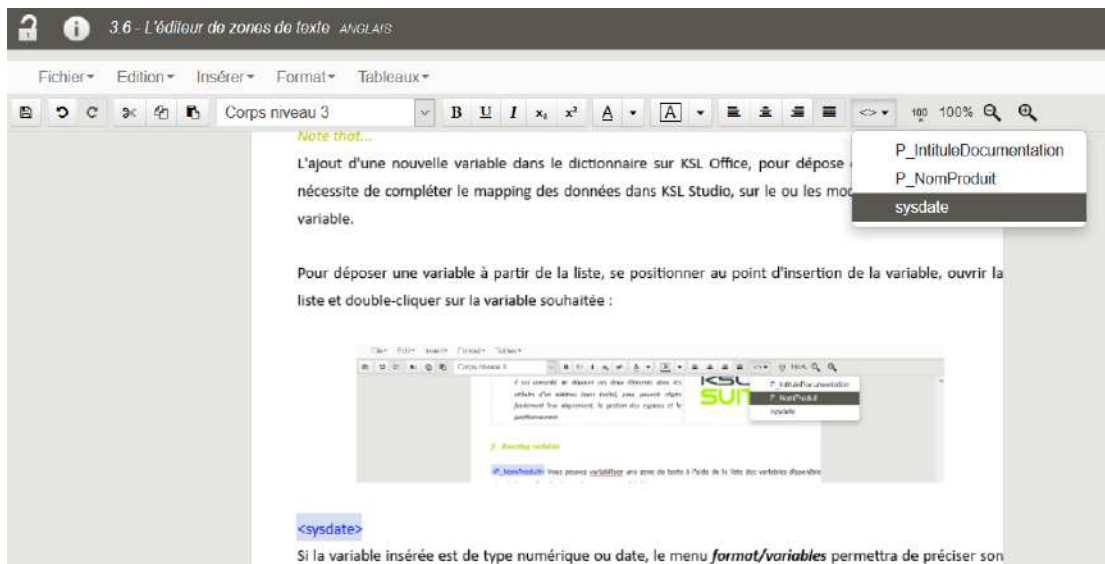


If this list is empty no variable will be available for the current text zone. the useful variable must be declared.

Note that...

Some declared variables can be listed in shared dictionary which allows to easily use them from a text zone to another and avoid any error when creating a new variable and its type. Adding a new variable in this dictionary, requires to define the data mapping in KSL Studio, on the templates that use this variable.

To insert a variable from the list, position the cursor where the variable will be inserted and select the variable in the list :



If the inserted variable is of numeric or date type, double-clicking on it allows to specify its format. The check boxes define if the variable is kept in Interactive document or if it is replaced by its value (cannot be modified).

This properties box is also accessible via the *Format/Variables* menu.

Variable properties ✕

Format

Predefined formats ▼

Replace variable by value in interactive document

Follow project option

Keep variable

Replace variable by value

The first option allows to manage the format of dates and numeric.

- For dates, you can use standard format or define a specific one.
- For numeric, # is a mandatory digit and & an optional one.

For real variable, the mask is defined by default on the length of the variable when inserting it, then it is disconnected to this default length to allow multiple representation of the same variable. Therefore, changing the length of the variable in the dictionary will not impact this formatting.

The last option impacts the display of the variable when producing the document which will be personalized. When a user personalizes a document in KSL interactive, he will see either the variable or the value of the variable.

Note that...

This value will not be modified when personalizing the document; it becomes a static content of the text zone and the link with the variable is broken.

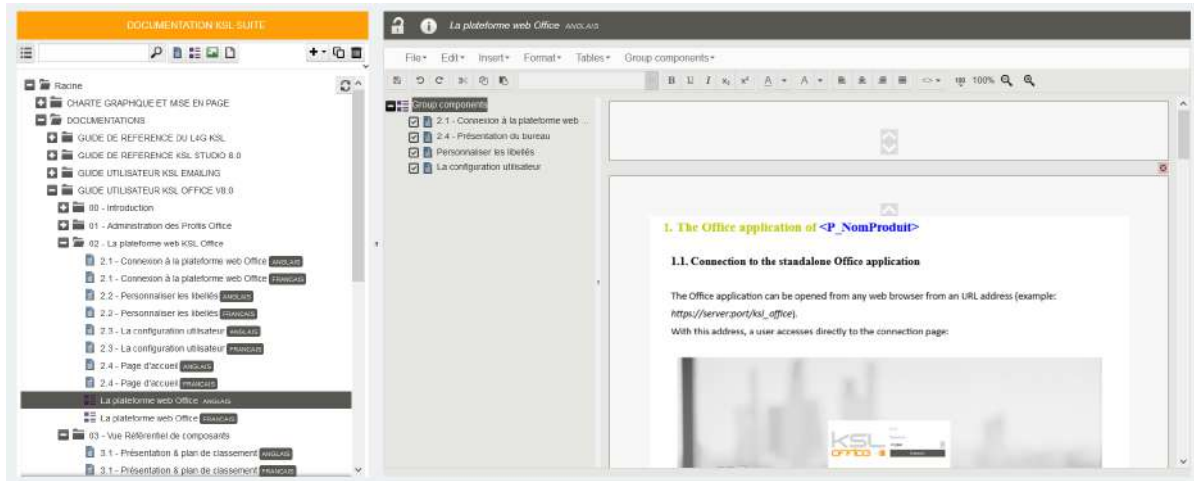
5.9. The group editor


A group is a logical sequence of text boxes, external documents (annexes), and sometimes subgroups, possibly separated by page breaks.

When a group is personalized in an interactive document, it gives the user the ability to assemble and quickly organize its components, by a simple drag and drop from the repository's classification tree

Like any text zones, groups of text zones can have variants.

a. Overview



To modify a group, select it in the classification tree and click the button  to reserve and modify it.

The list of components of the group

On the left of the editor, a list presents the components composing the group.

These components can be selected or deselected to remove them "logically": when using this group, the document won't display the deselected (optional) text zones. The text zone will appear only if selected in the group or later during the interactive personalization.

The edition part of the editor

The edition part at the right of the editor allows to view, modify, assemble the text zones in a linear way. Some external files and sub-groups can also be added.

The components can be accessible either from this list or directly in the content at the right of the editor

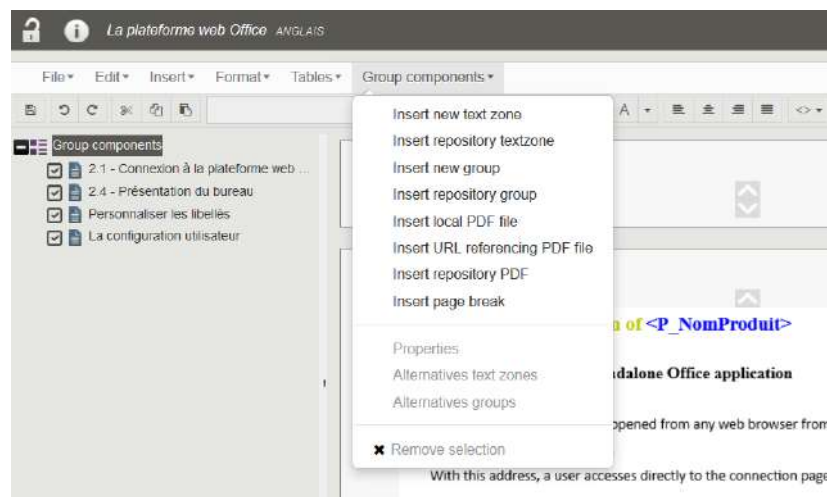
Note that...

Text zones can be moved in the group but cannot be positioned in parallel; their width is fixed to the space proposed horizontally by the group.

Reordering of the group components can be done by drag and drop in the list or in the right display.

b. Adding and maintaining the components of a group

The *Group components* menu allows to insert all types of authorized components. This action can also be done with a the right-click + Insert or with a component drag and drop from the repository.



Two types of text zones can be inserted in a group:

- Local text zones: their content is specific to the group. They are created and updated directly in the group and don't impact any other object. They are created by a *Right-click/ Insert new text zone*.
- Repository text zones: they are inserted in the group by drag and drop from the repository tree or with the menu *Right-click/ Insert repository text zone*.

Note that...

Modifying a shared text zone in the group directly impacts its content in the repository.

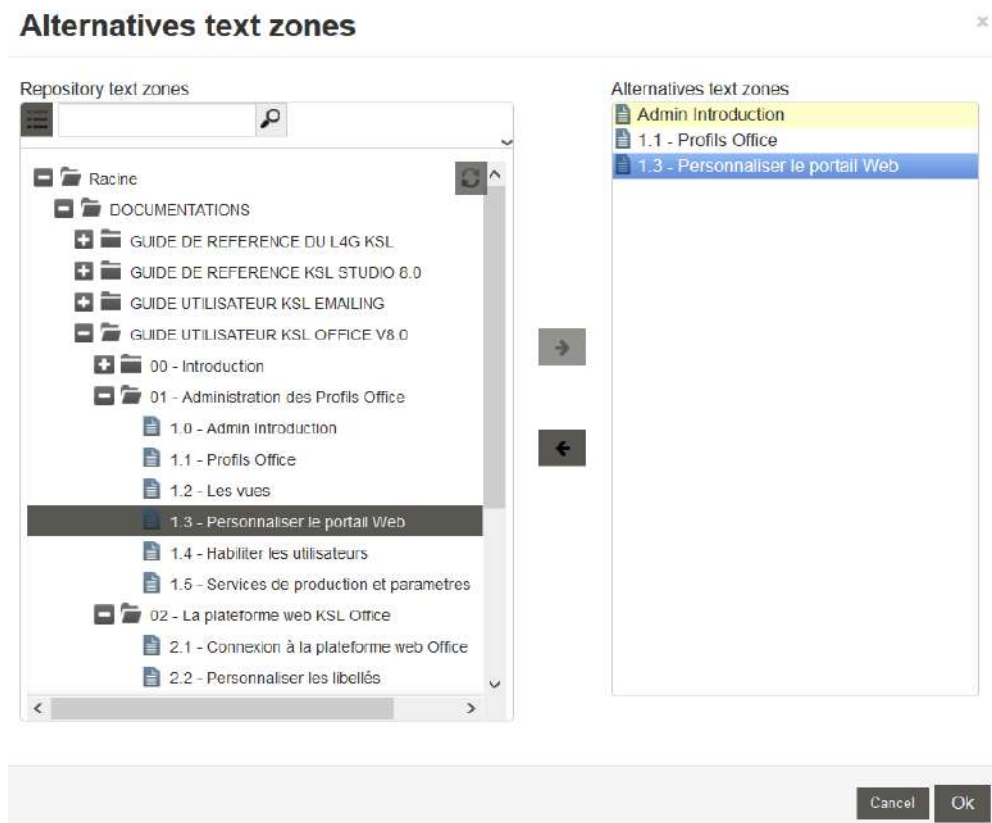
Changing the name of a shared text box in the repository does not impact the name of this text zone in the group, allowing a customization of the name of the component of a group.

Alternative text zones

A group can include text zones set to present text zone alternatives to the final user: during his interactive personalization of a document, the user will see the text zone in the document with a selector allowing him to choose a different text zone among a predefined list.

To setup such a text zone in a group:

- Insert the default text zone in the group
- On this text zone, *Right-click/ Alternative text zones*

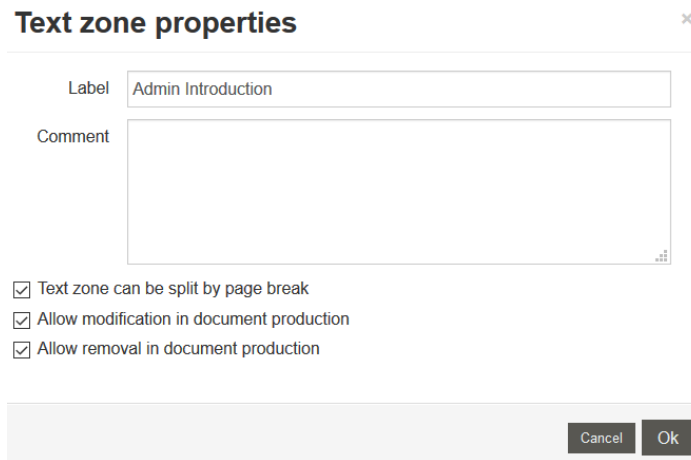


- Choose in the repository tree, the text zones that can potentially replace the current text box, and not forget to keep the current text zone in the list.
- After saving the selection, the "alternatives" selector icon will appear in Ksl Interactive, attached to the text zone. By clicking on the icon, you get the list of alternative contents. The current text zone is checked in the list.



Text zone properties

Whether the text box is local or stored in the repository, its properties can be edited by a *Right-Click/Properties* on the text zone.



Text zone properties ×

Label: Admin Introduction

Comment:

Text zone can be split by page break
 Allow modification in document production
 Allow removal in document production

Cancel Ok

The options are:

- Text zone can be split by page break: this option can forbid a text to be split if its size is smaller than the page size when generating the document. The text zone is then integrally transferred to the next page.
- Allow modification in document production: this option allows the personalization of the text zone in Ksl Interactive (edition mode), when the group is authorized to be modified.
- Allow removal in document production: this option allows the physical suppression of the text zone in the group when personalizing a document including the group.

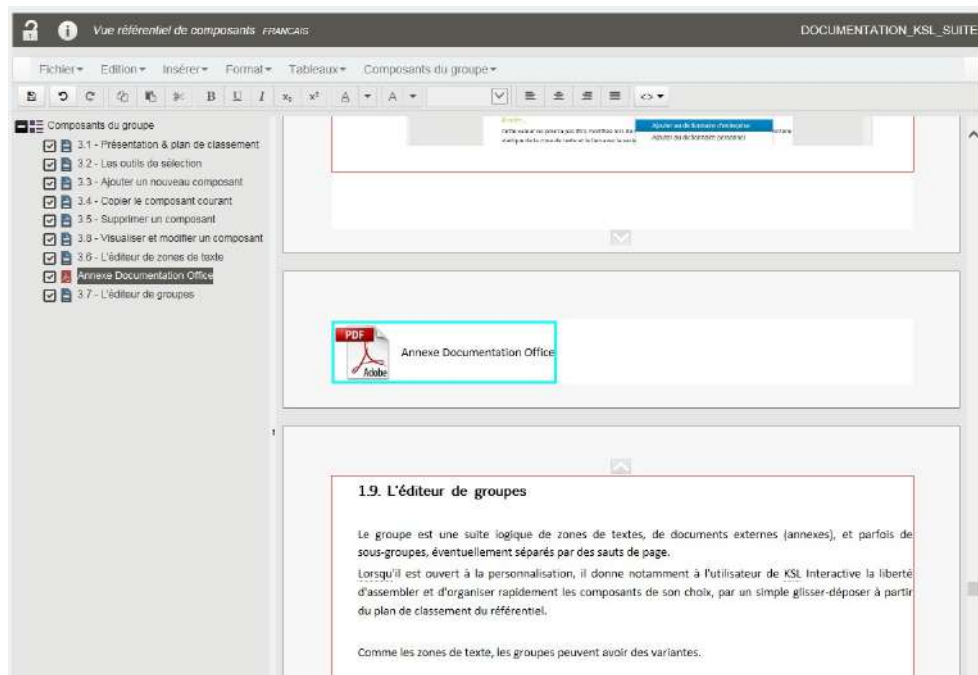
External files

These are usually documents in PDF format.

An external document can be inserted between two text zones.

- By drag and drop from the repository tree or *Right-Click/Insert repository PDF*
- By a *Right-click/ Insert local PDF file* to insert a PDF available on the local workstation
- By a *Right-click/ Insert URL referencing PDF file* to insert a PDF addressed by a web address

Inserting a PDF document systematically causes a page break in the group, and the PDF is integrated into the list of its components.

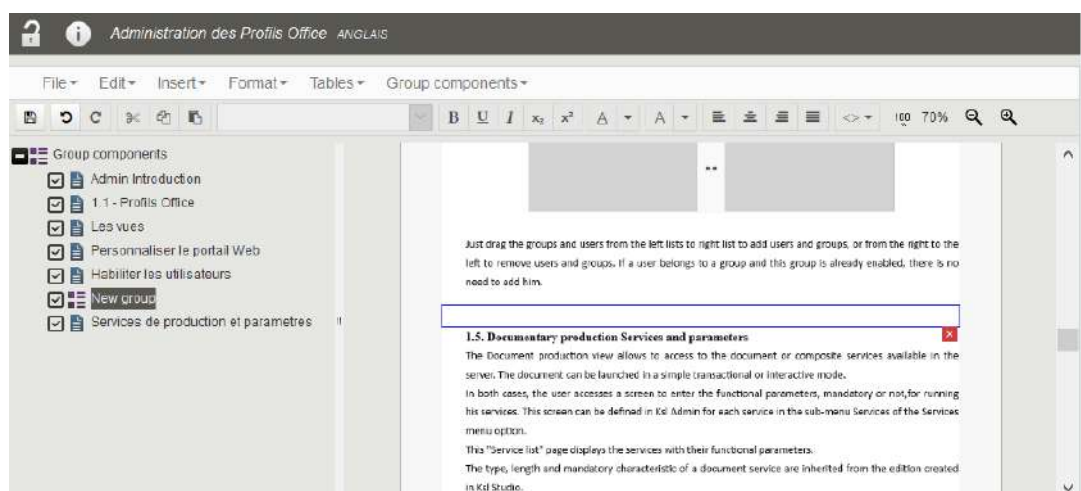


Subgroups

A group can also include subgroups; as any other components, a sub-group can be inserted between two components. These groups can be:

- Local groups, specific to the "master" group in which they are created; to insert a local sub-group, position your cursor in the group and select *Right-click/ Insert new group*,
- Other groups of the repository: these subgroups are groups already existing in the repository; to insert an existing group, drag and drop it from the repository or select *Right click/ Insert repository group*.

Inserting a local group creates a new empty group within the group; all the components inserted within this subgroup will follow by default the personalization rules for the interactive creation of a document.



As for the text zones, it is possible to create a list of alternative subgroups when the subgroup is a shared component of the repository.

To access to this feature, right-click on the subgroup in the component list part. Accessing to the subgroup properties and deleting the subgroup can also be done by a right-click.

However, a subgroup has a particularity that impacts the interactive document using it. In its properties, you can choose between 3 types of customization:

- Forbid changing the group: its modification will be forbidden for the user
- Allow changing the group: modify content, add and move components: the modification of its content and the component insertion and moves will be possible
- Allow changing group content only: only the modification of content will be possible

If the option "Allow changing group content only" is selected, the interactive document have the following behavior:

- It is impossible to move the level-1 components in the group
- The physical insertion and deletion of components (shared or local) is not possible in the group
- If the deletion of components of the group is authorized, only a logical deletion is possible
- If a subgroup exists, this group does not inherit this option; it have its own option (activated or not) and its own behavior
- The component content can still be modified

Page breaks

It is possible to insert and delete an explicit page break between two elements of a group.

- Position on the component preceding the page break, and select *Right-click/ Add a page break*
- An icon is displayed to indicate the page break between the two elements
- Deleting the page break can be done by clicking on the icon.



Right-clicking on the icon gives you the option to modify the layout of the following pages: page orientation, format and margins if necessary. By default, the layout of the previous page is kept.

Page layout ×

Keep previous page layout

Paper size Standard

Format A4 (21 cm * 29.7 cm) ▾

Custom

Width 21 cm ▴ ▾

Height 29.7 cm ▴ ▾

Orientation Portrait

Landscape

Left margin 1.5 cm ▴ ▾

Right margin 1.5 cm ▴ ▾

Top margin 1.5 cm ▴ ▾

Bottom margin 0.7 cm ▴ ▾

Cancel
Ok

Removing a component of a group

To remove a component from a group, position on the component and select *Right click/Remove* to remove it without deleting it from the repository if it is a shared component.

5.10. View and modify a component

Select a component in the repository tree by using the search bar and/or filters. The content of the component on which you are positioned is immediately displayed.

The following actions are possible when editing any component of the repository:

- Moving it in the repository tree; this action is conditioned to the user's rights
- Renaming the component: only its Label can be modified

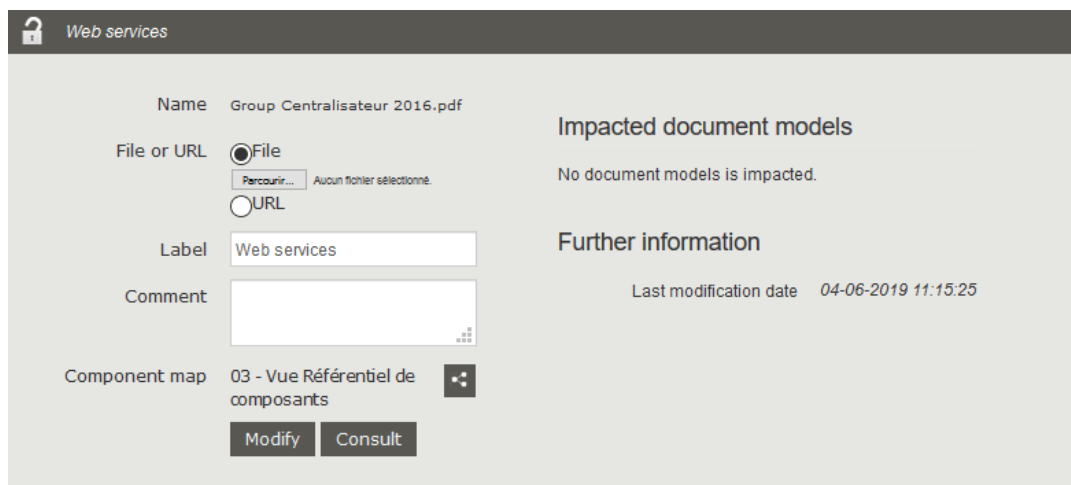
a. Modify a picture

When editing an existing picture, its image can be changed by clicking on *Browse* and selecting another image file.



b. Modify and view an external file

You can modify the external file associated to component of the repository.
You can also view it if you have the appropriate editor for the file format.



c. Modify a text zone or a group

Text zones and groups are components that appear in preview mode when selected.
There are several specific actions on these components:



Allows to access to the informations of the component and to modify its classification and label.



Allows to edit the component; this action automatically locks the component.



Unlocks the component after modification.

The two last actions secure collaborative work: only one user can edit a component at the same time.
After edited and unlocked, a text zone is available for another edition. However, during edition, the

component remains viewable by other users.

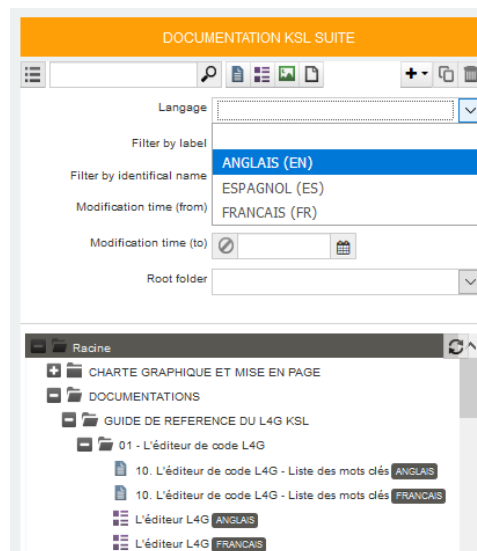
6. The variant comparison view

6.1. Variants and repository

Some Ksl project require using variants of text zones and variants of groups within the repository. These variants correspond to alternative content for managing multilingual, multi-agencies or multi-brands content.

According to user rights, the repository classification tree presents one or more variants of each component. The modification of a variant of a component can be allowed or forbidden. It is also possible to filter the display of variants according to their criterion, in the advanced display settings of the classification tree.

When there is a rule defining variants for a component, the repository tree shows the different variant components one under the other, with the value of the variant criterion (see an example below). An eye icon appears next to the read-only variants.

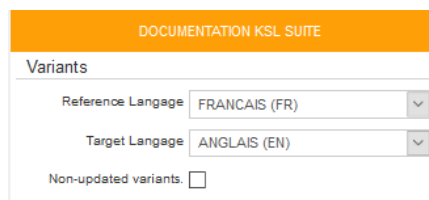


6.2. Variant comparison tool

The variant comparison interface is a maintenance tool that allows to create and update variants. It displays a reference component and the target variant if it exists. It allows to create a new variant of a component.



In the variants comparison interface, select the value of the reference criterion and the target one. These two criteria can also be configured by default in the profile view (KSL Admin).




The check-box "not-updated variants" allows to display only components without any target variant and the components with a reference content that has been modified. Note that, this option will allow to list the components which don't exist for the target variant and the components with a date older then the reference component date.

A "+" indicator displayed next to the component means the variant can be created. Otherwise, the reference component and its variant already exist.

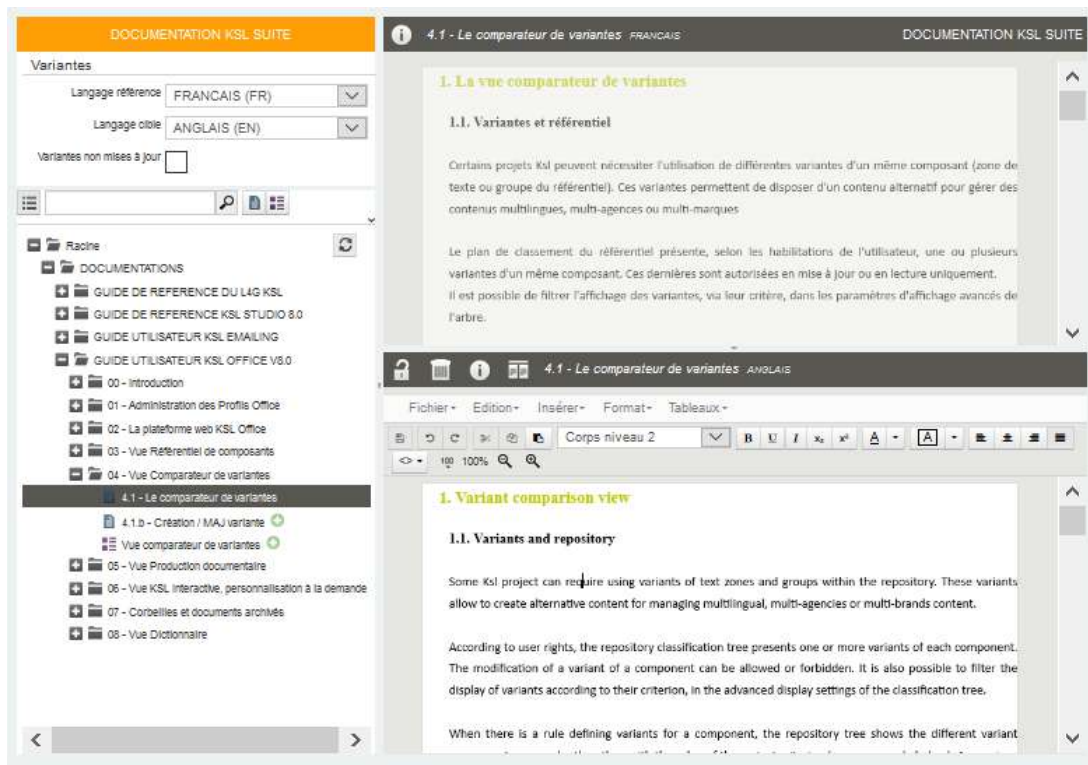
The check-box "variants not updated" allows to display only those components with no target variant and those whose reference content has been modified.


If the + indicator is displayed next to the component, this means that the variant must be created. Otherwise, the reference component and its variant are already available.

a. Side by side or Top and Bottom views

Select the component in the tree. The reference and target variants can be viewed side by side by default. The two components can also be presented horizontally, in a top and bottom presentation, by clicking the icon .

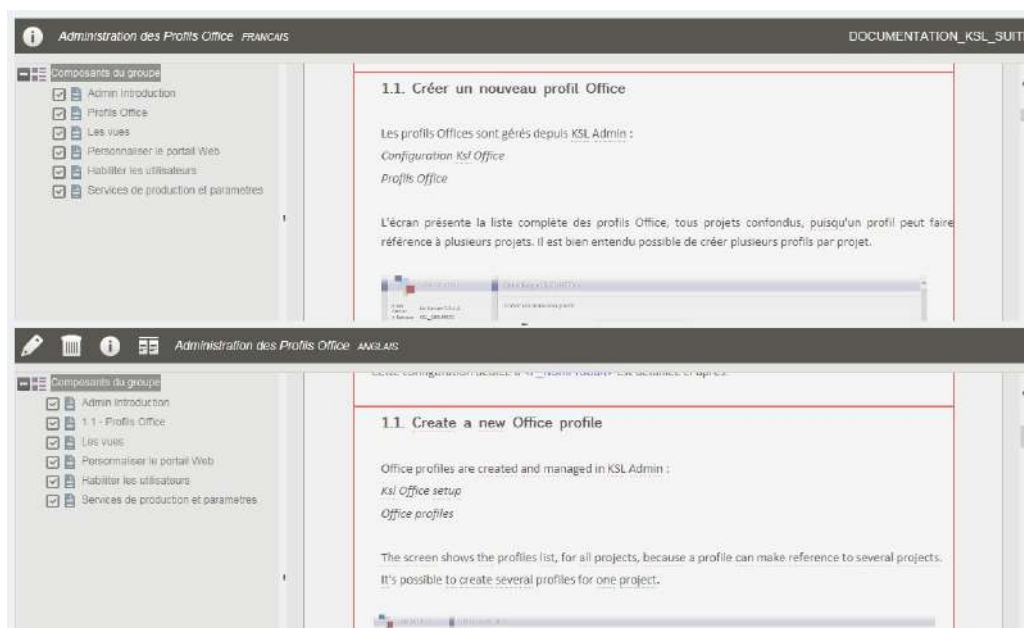




The icon  allows to come back to a Side by Side presentation.



The "Side by Side" or "Top and Bottom" display choice is essentially dependent of the text zone form, its width and its length. For example, the Top and Bottom mode is particularly adapted to group comparison.



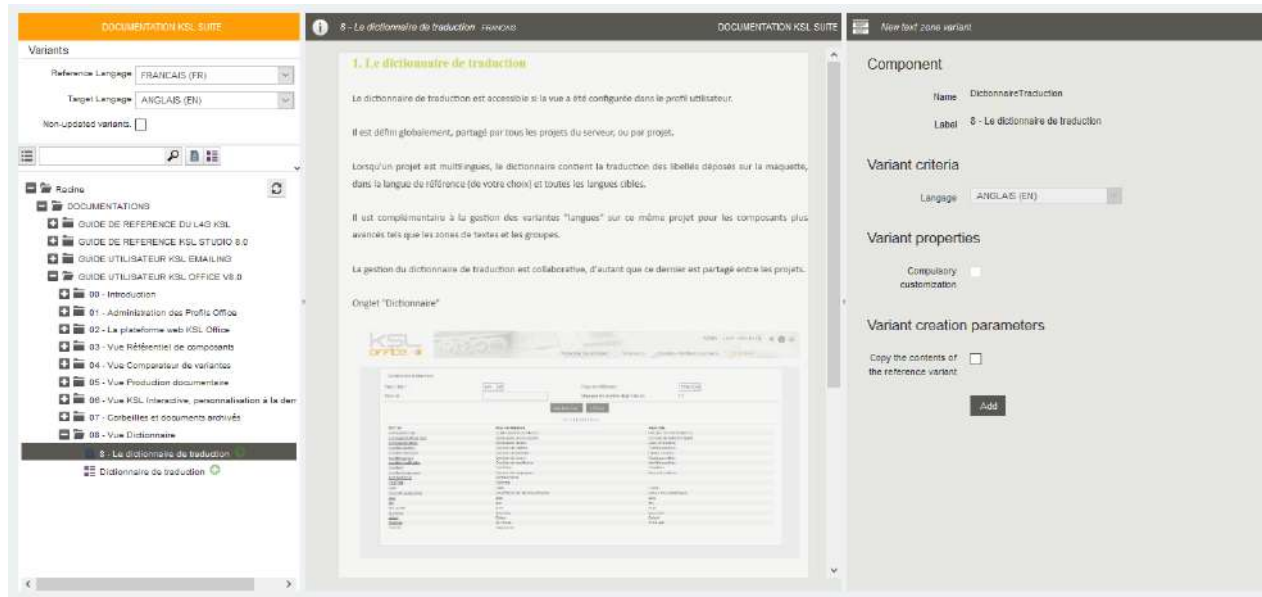
b. Create and update variants

The comparison tool allows to manage the text variants of the repository.

In this user interface:

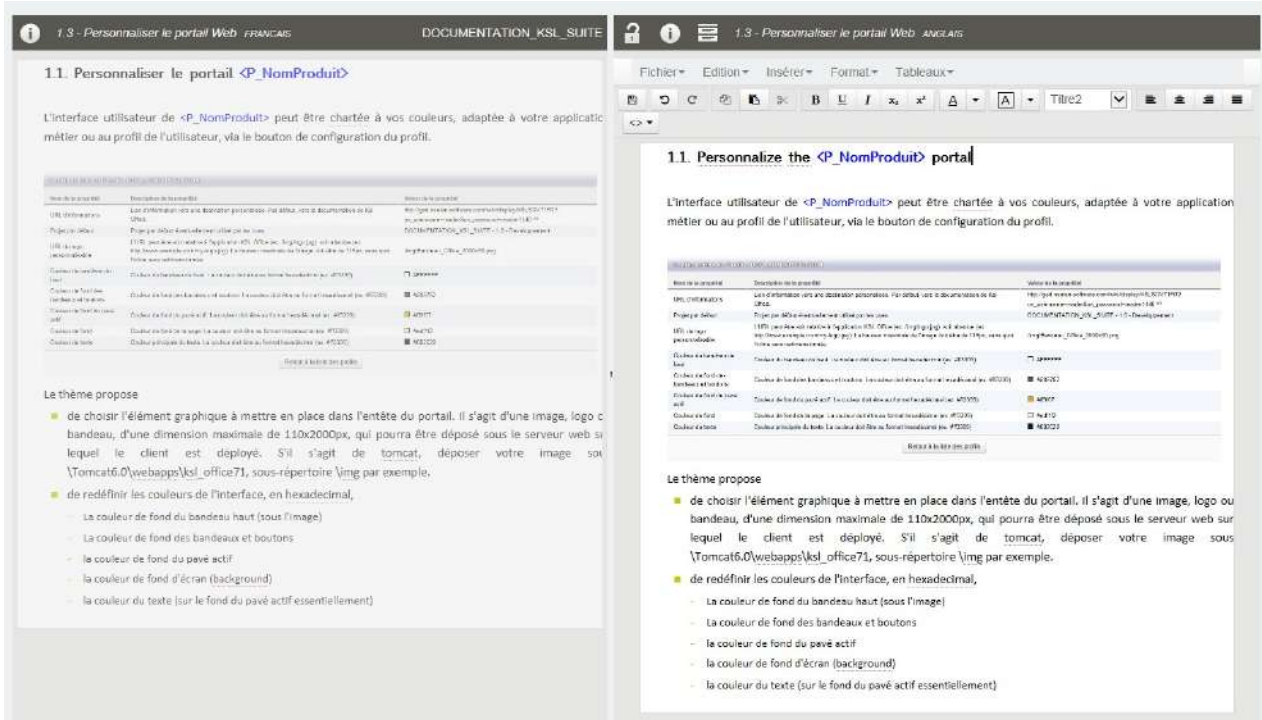
- The reference components are not modifiable
- The target variants of a reference component can be created, modified and deleted.


If the target variant does not exist anymore, a "+" indicator is displayed next to the component. The selection of the component allows to create the target variant.

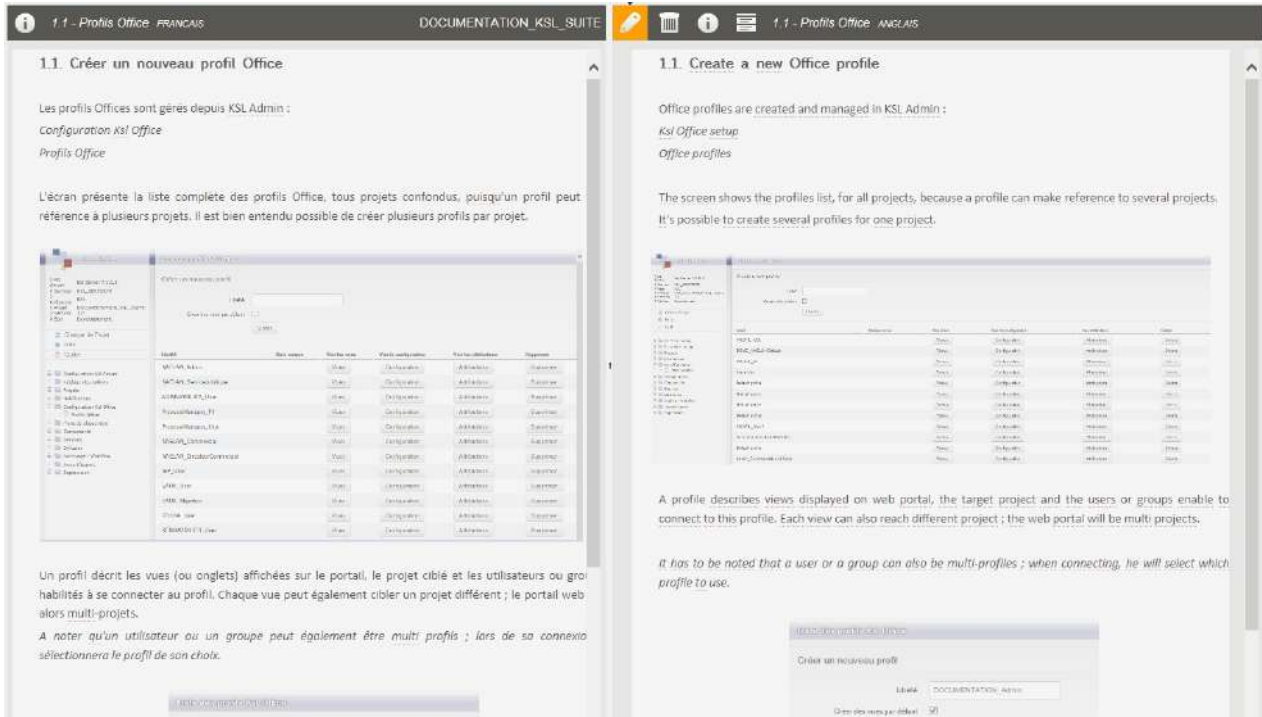


On the right side,

- The target value is displayed
- The option "To personalized" defined if the personalization of the component is mandatory, when this text component is used in an interactive document.
- The option "Copy the content of the reference variant" allows to accelerate the creation of a content close to the reference one.
- The button "Add" creates the variant



The content of the new variant is immediately available for modification. If the target variant already exists, select directly the variant to modify it. Clicking on the button  allows to edit the variant.



7. The Document Production view

7.1. Create a new document via KSL Office


The Document production view provides the list of services a user can launch autonomously from KSL Office. These services and their launching mode depend essentially on their rights defined in KSL Admin.


This view also display the list of document in progress.

If there is no document in progress, the view is positioned on the tab allowing to create a document.

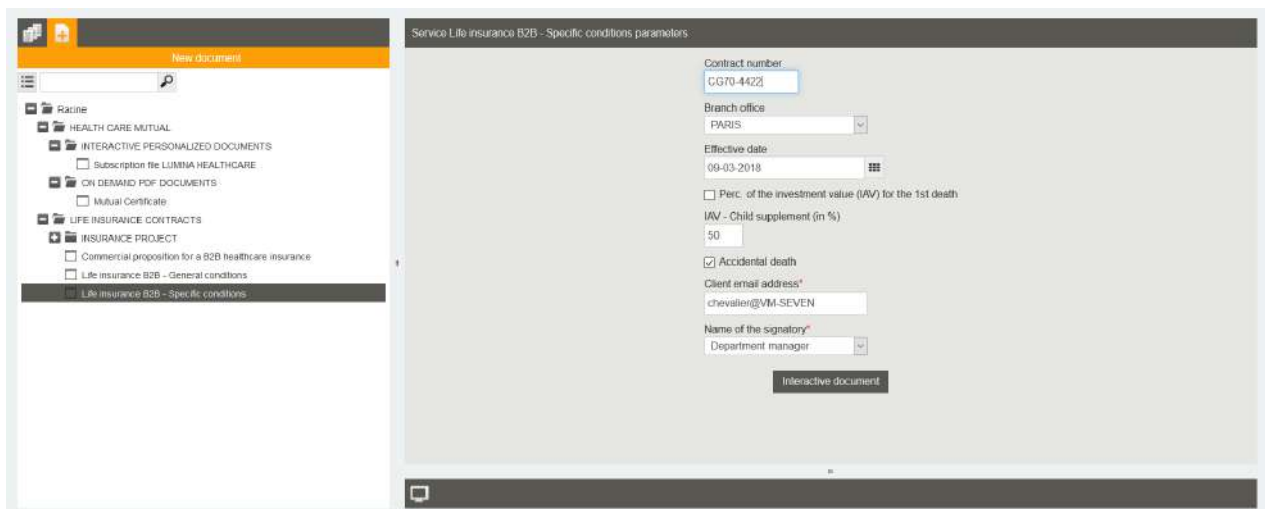


Note that...

The documents in progress  are interactive documents whose personalization is not finished; they were neither delivered nor archived. The list of documents in progress (document list) is displayed by default when there is at least one document in the list (see dedicated chapter on this issue).

The button for creating a new document  allows to display, on the left side, all the services allowed for the user. These services are organized within a classification tree. It is also possible to search for a specific service in this tree to access to it more quickly.

Select a production service; a parameter form appears in the right of the screen.



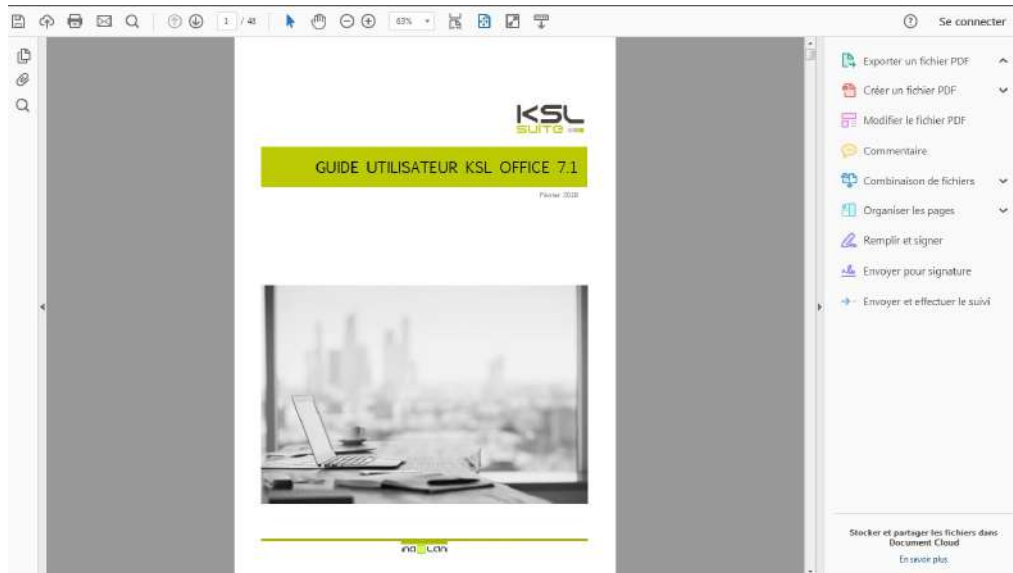
Note that...

These parameters are those defined in the service. Their display order as well as their default values and input characteristics are configured on the service in KSL Admin.

Depending on the launch mode specified in the service (KSL Admin), running with or without personalization, one or more buttons appear at the bottom of the parameter form.

7.2. On-demand generation

The "Formatted document " button corresponds to the generation of a document without any interactive personalization; a document is immediately produced in a predefined format (for example PDF - the format is specified on the appropriate parameter of the service) or transferred for printing. This on-demand mode corresponds to a generation in real-time.



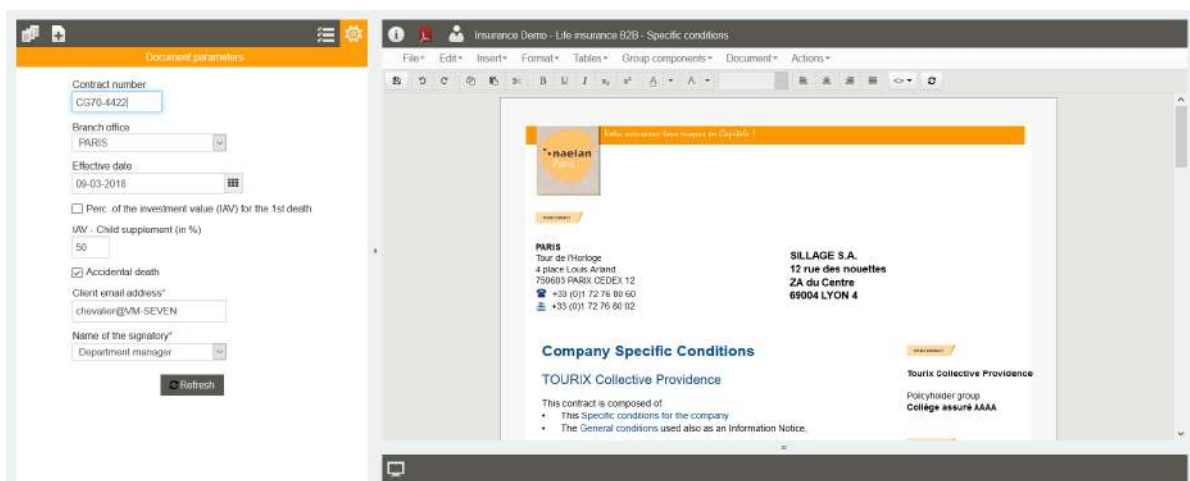
Note that...

The document production launched from KSL Office may also concern high volume document generation or more complex delivery scenarios, such as multichannel delivery.

7.3. Interactive edition

The document production from KSL Office may also concern high volume document generation or more complex document delivery scenarios , such as multichannel delivery.

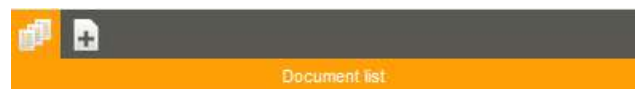
The "Interactive document " button corresponds to an Edit with personalization mode; It initiates the production of the document in interactive mode by opening it in an editor and allowing the user to personalize its content.



To give this personalization flexibility to an interactive document, its template has to be designed in Ksl Studio using components that are controlled by change and logical rules. These rules apply to shared or local text zones as well as to shared or local groups.

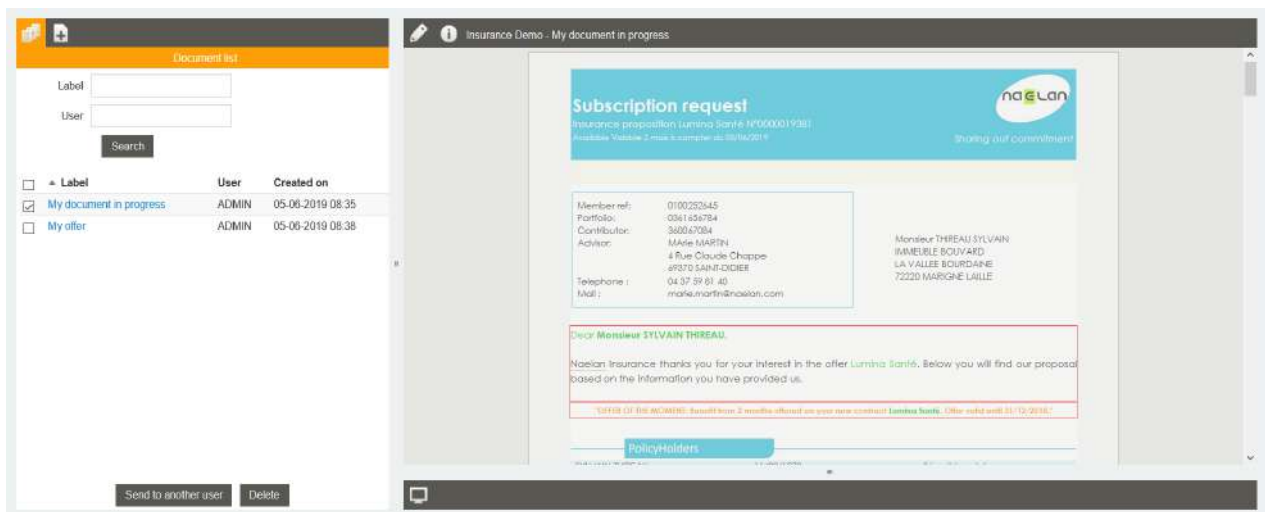
7.4. Interactive document in progress (Document list)

The document list presents by default a view containing the interactive documents which are "in progress"; this view is always accessible from the Document production view.



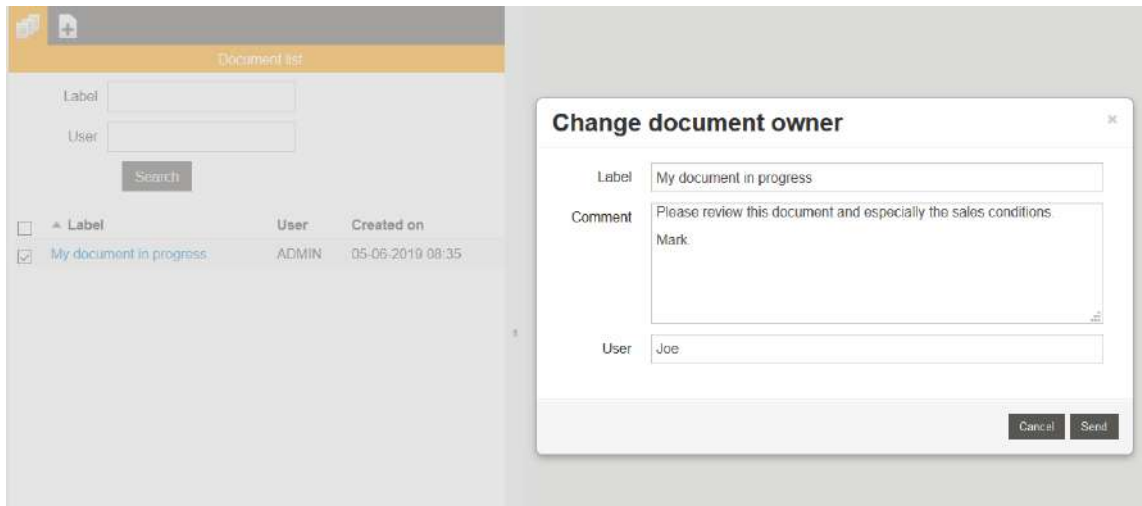
An interactive document is inserted in the list when the user saves it. A document is removed from this list when its personalization is finished: i.e. when the document is delivered, sent for validation and/or archived.

The selected document is displayed in the right window.

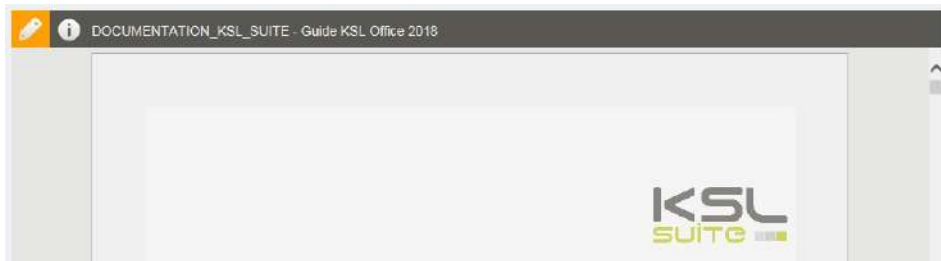


Several actions are possible in the Document list:

- A permanent deletion with the *Delete* button; a multiple document selection is possible
- An internal delivery with the *Send to another user* button: the document is transferred to the Document list of another user with its comment



- A personalization of the selected document is possible by clicking the "Edit " (pencil) button on the right screen which opens the interactive editing window.



7.5. Retrieving an interactive document in case of browser or workstation problem

In the event of a malfunction on the current document, it is possible for a user to retrieve his interactive document by logging on to a new browser or to another workstation. This action can be configured at project level (Admin) with a possible level of confirmation.

In the context, it is also possible for an administrator user (only) to retrieve a user's current document in order to regain control of the document.

8. Interactive document

An interactive document aims to give an user the control on the final interactive personalization of a composed and personalized document.

A interactive document can differ according each context:

- Light modification: e.g. choosing an alternative of text zone or adding a personalized text on the body of a mail,
- Medium modification: e.g. modifying text paragraphs but also adding a chapter, when redacting proposals or contracts of several pages
- Building a complete document: e.g. building a document from a "white page" and assembling existing blocks of paragraphs and chapters of the repository, when redacting specific contracts or RFPs.

An interactive document is accessible from Ksl Office; its launch can also be realized from a business application via the LaunchKid web service.

Note: The KSL interactive document editor is used in several commercial offers including KSL Proposal Manager, KSL Suite and KSL for Salesforce. Check with your sales representative for details on the usable functions of the publisher for the license you have acquired.

8.1. Document display

The interactive document does not appear as a final document, even if it is very close to it.

The difference lies mainly in the automatic page breaks, recalculated according to the components potentially deleted, added or moved.

If the document has a summary, the page number will not be indicated.

If you have defined an overlay, it is presented under the document but there may be a discrepancy between the content of the page and its overlay. This offset will disappear on the final document, so it is necessary to request the PDF preview of the final document before any distribution.

8.2. The personalizable components

Personalizable content concerns two types of component: text zones and the groups of text zones, each of theses types with its own characteristics.

a. The Text zone, personalizing content

A text zone present in an interactive document allows:

- the modification of its content
- its logical or physical removal
- some alternative text zones, personalizable or not personalizable

Accessing to the personalization of a text zone obeys to the combination of several rules:

- the text zone is defined as Editable and / or Deletable in the document template in Ksl Studio (properties of the text zone)
- alternatives are defined in Ksl Studio on this text zone (properties of the text zone)
- the user must have edition rights on the document preview (rights defined in Ksl Admin)
- if the text zone is shareable (text zone stored in the repository), it can be set as "to be personalized" thanks to a check box in the Information view of the text zone in Ksl Office; this option informs the user on the need to modify its contents during the interactive personalization.

b. The Group of text zones, customizing document structure and content

A group present in an interactive document authorizes:

- content personalization, which means that all or some of the text zones composing it are allowed to be modified by users
- its logical or physical removal
- the logical or physical removal of text zones, sub-groups or external files (Pdf) of the group
- moving text zones, sub-groups or external files in the group
- adding a new text zone, a new sub-group, a page break or an external document to the group
- providing to the user a choice between several alternative groups

Like text zones, accessing to the personalization of a group obeys to the combination of several rules:

- the group is defined as Editable and / or Deletable in the document template in Ksl Studio (properties of the group)
- alternatives are defined in Ksl Studio for this group (group properties)
- the user must have edition rights on preview (defined in Ksl Admin)

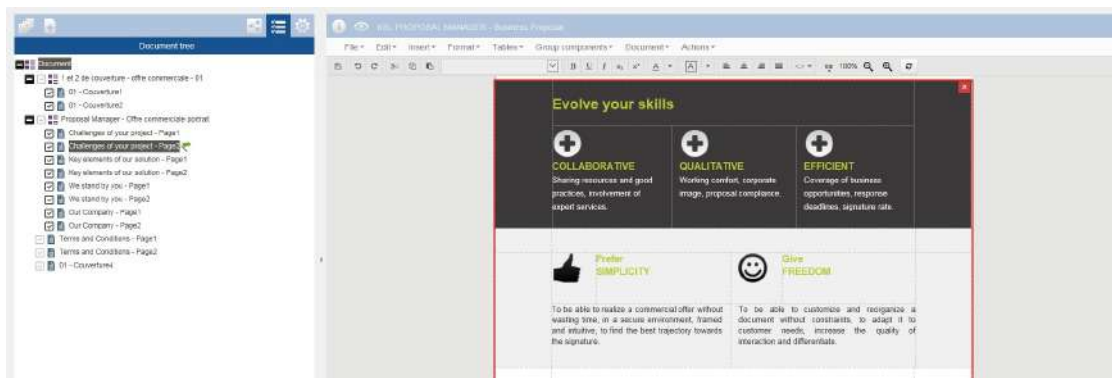
Within the group, text zones are subject to their own rules, defined on the group in the Ksl Office repository:

- allow to be split on page breaks
- authorize modification
- allow deletion

These last two issues make it possible to protect chosen contents (legal notice and other legal or sensitive texts for example), whatever the context of use. These rules have a priority over the properties of the component in the document template.

8.3. The "Document tree" view












The list of customizable components is available in the Document tree view accessible from the toolbar of the interactive document.




This list allows:

- Navigate into the document and access to the list of potentially modifiable or deletable components. It really allows the user to spare time especially with long documents: with a simple click on the target content, the user accesses directly to the text on the right.
- Move text zones, sub-groups and external files within a group by drag & drop; the document is then automatically impacted in real time.

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

-  the personalizable component is a text zone
-  the personalizable component is a group
-  the component is deletable (logical removal)
-  the component has been removed (logical removal)
-  the content of the component has been personalized; it can be a text personalization or the selection of an alternative to the component proposed by default
-  the component has been added to the document, necessarily inside a group, and it has been personalized
-  the component is "to be personalized", but has not been personalized yet
-  The external PDF file encountered a uploading problem
-  The external PDF file is protected and cannot be inserted
-  the component has been added to the document, necessarily inside a group
-  there is a new version of the component (not personalized) in the repository

Some examples:

 ComptePB - Cas général

The text zone is personalizable and deletable, but it has not been personalized

<p>Date d'effet - Sans refonte année N</p>	<p>The text zone is not deletable but it has been personalized</p>
<p>Base résiliation - 3 mois</p>	<p>The text zone is not deletable ; it is "to personalized"</p>
<p>Modalités de règlement</p>	<p>The text zone is not deletable and it has not been personalized, but it has a newer version in the repository</p>
<p>Complément législation</p>	<p>The text zone has been added and it has been personalized. It is deletable</p>
<p>Groupe Législation&Réclamations</p> <ul style="list-style-type: none"> 1.9. Législation traitement données personnelles Complément législation 1.10. Les réclamations 	<p>The group is personalizable but it is not deletable. It is composed of 3 text zones with different personalization properties. The text zones can be moved inside the group.</p>

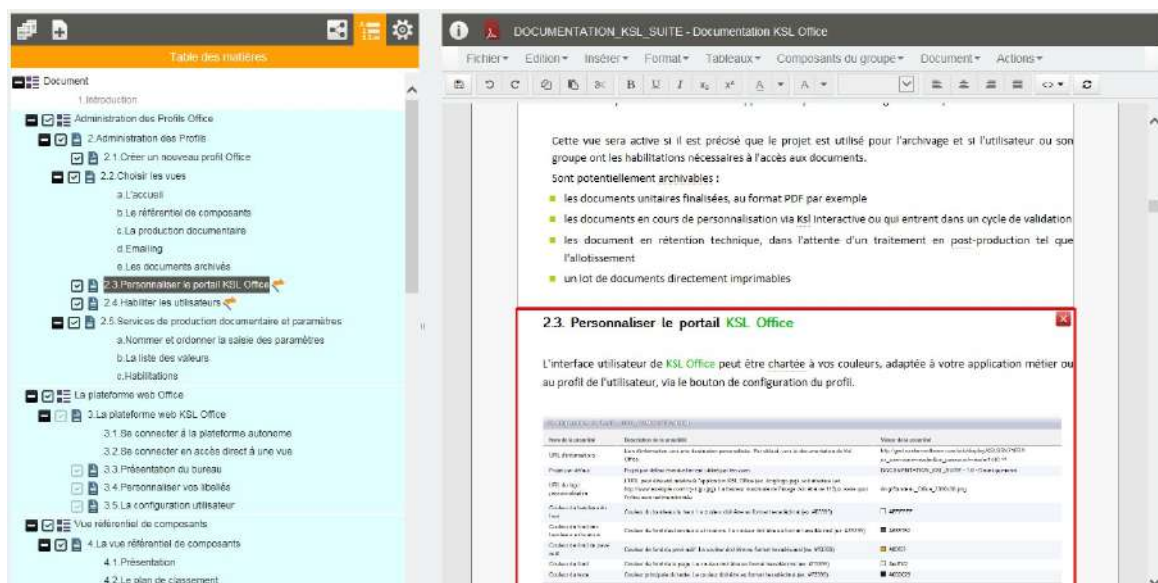
8.4. The "Table of contents" view

The list of personalizable components can be replaced by the "table of contents" view (configured at the project level in Ksl Admin). In this 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.

This view is more functional than the list of Document tree and offers a synthetic view of the document; this view is particularly adapted to the context of long and highly structured document.



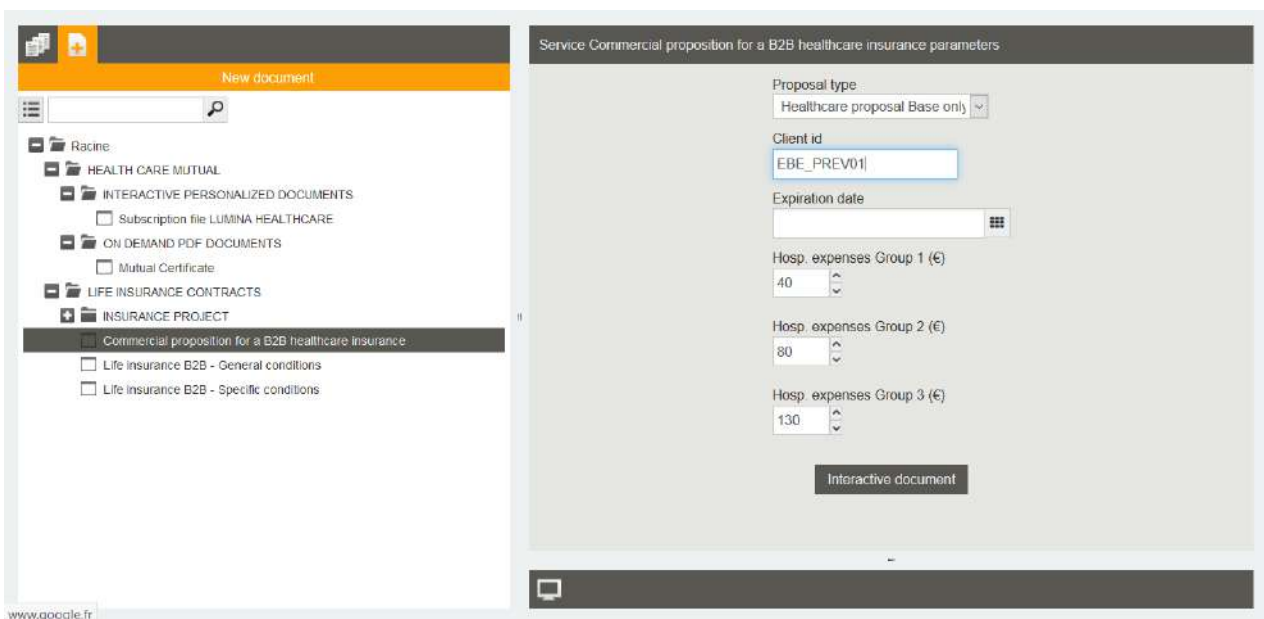
This view share the same characteristics, in terms of interactivity, as the Document tree:

- Navigate in the list of personalizable components
- Status indicators
- Move components inside the groups

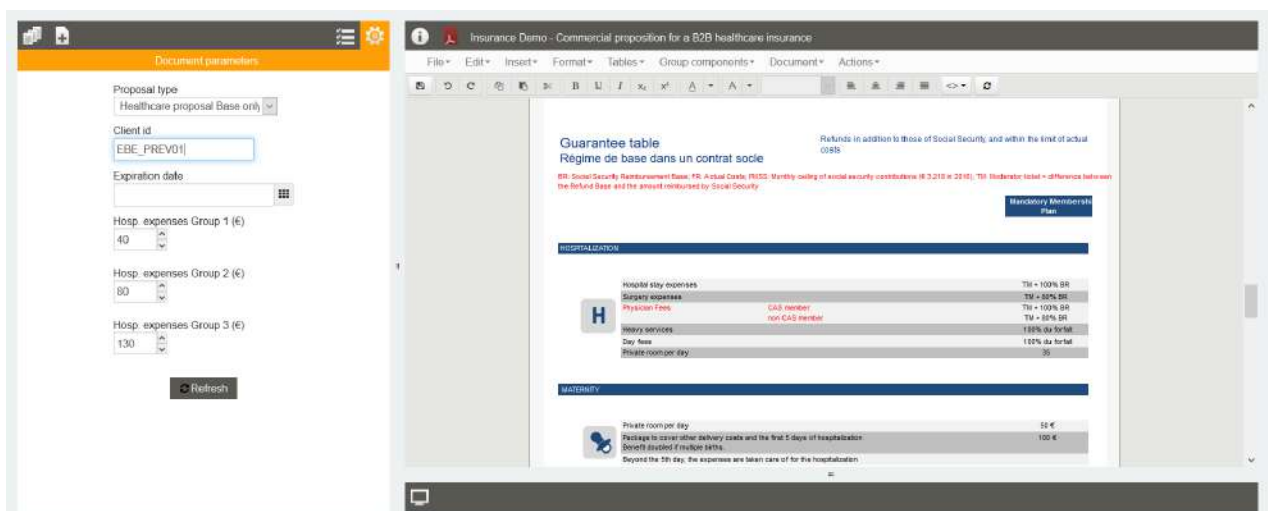
8.5. Personalize the document

a. The parameters

Launch the interactive document by selecting its service in the list of services of the Document production view. A view appears presenting the parameters of the service.



Click on the *Interactive document* button; the interactive document appears:



The parameters are still reachable and modifiable on the left side of the interactive view.

The "Refresh" button must be selected after any parameter change, whatever its nature, to take it into account and get an refreshed document on the right.

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

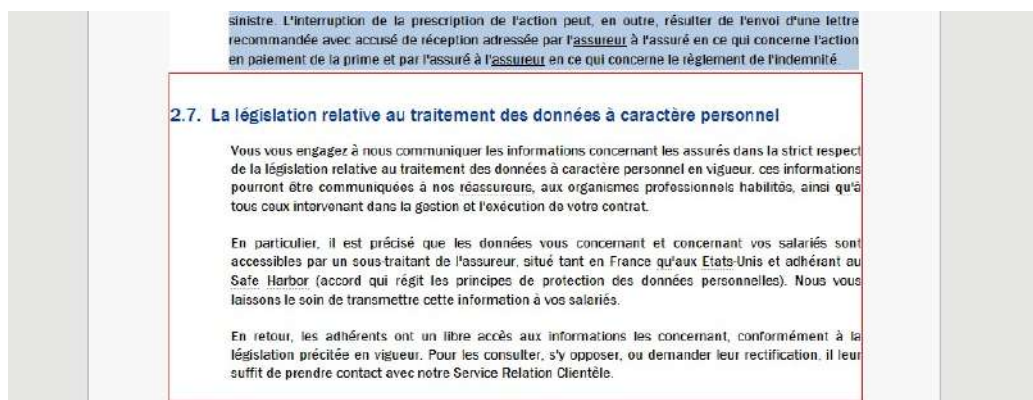
Note that..

The value of the parameters is kept when the interactive document is sent to a Ksl workflow or when the document is archived. As long as the document is not permanently archived in its final version, the parameters are potentially modifiable on a "MODIFY" workflow action.

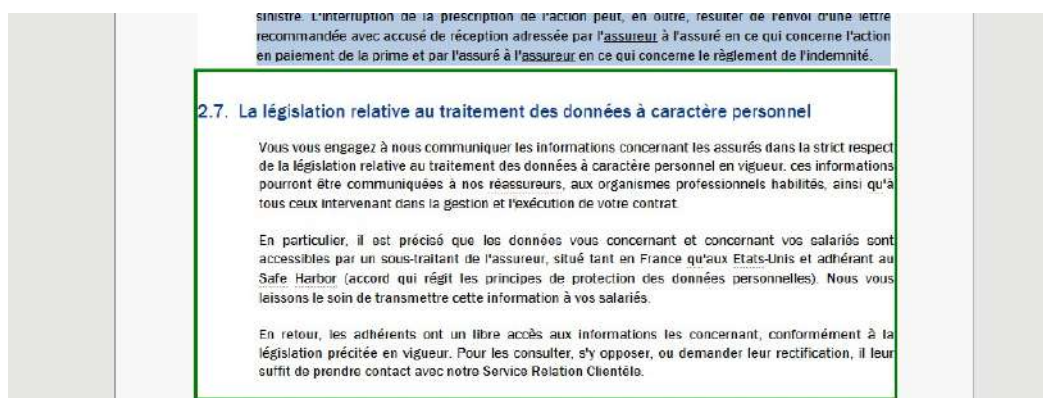
b. The content personalization

Personalized text zones

A personalizable text zone has red borders in the document.



Double-click on the zone to personalize it; the borders becomes green and you have access to the usual text editor to edit the content.



A text zone with gray borders is an element whose content is not editable but which has one or more of the following characteristics:

- The text zone is potentially deletable

- Alternatives exist for this text zone
- The text zone can be potentially moved if in a group

Note that...

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

Content without any borders is "fixed" and, therefore, non-personalizable in the document.

Adding items to a text zone


In a modifiable text zone, a user can insert:

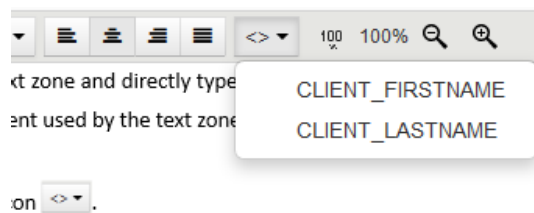
- Texts and variables,
- Tables with a fixed number of lines and columns,
- Picture selected on the local desktop
- Picture selected in the repository,

Note that...

The insertion of these items is also detailed in the chapter describing the creation of text zone components in the repository.

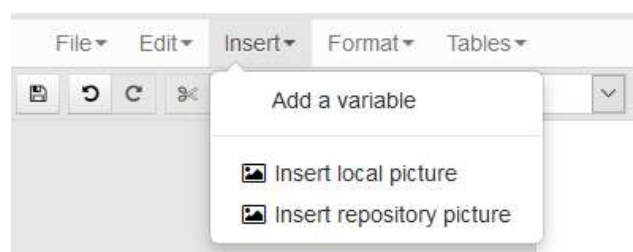
To add a text, position the cursor in the text zone and directly type the text. Note that the styles applied to this text belong to the style sheet component used by the text zone.

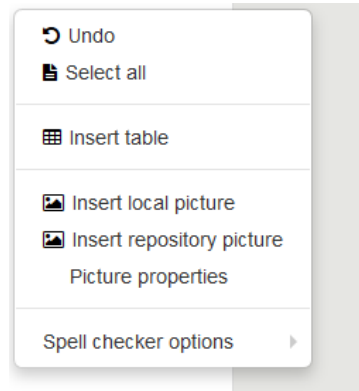
Adding variables can be directly with the icon .



To insert a table, position the cursor in the text zone and select the option *Tables/ Insert/ Insert table* or by a right-click and *Insert table*.

To add a picture, use the toolbar, or a right-click, and select *Insert local picture* or *Insert repository picture*.





Important note:

The size of picture taken with a Smartphone is increasingly important, greatly increasing the size of the documents using them. Before inserting many pictures in a document, be sure to optimize them to generate a final document with an acceptable size.

KSL is able to apply picture compression when generating the document, but this optimization can be not sufficient, and a pre-processing of the picture is often necessary. The parameters for this optimization are numerous and quite technical. You will find below the 3 basic rules that allow an acceptable optimization:

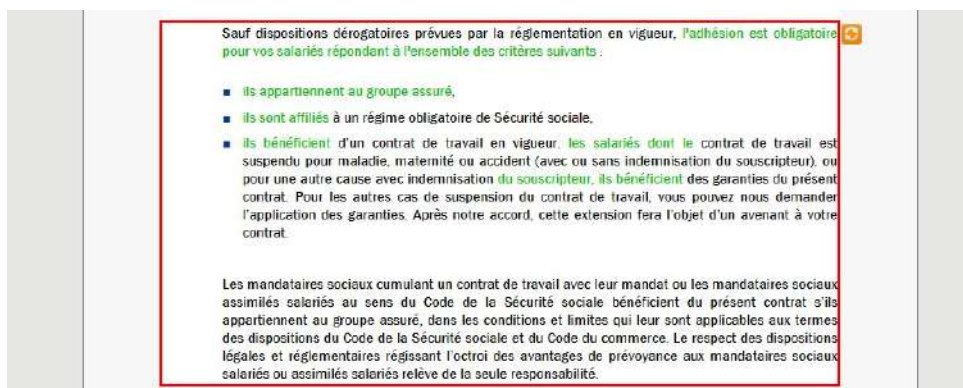
- Rule 1: resize the picture, a resolution of maximum 30 pixels per centimeter is recommended for a good print quality of the document


Rule 2: adopt the correct picture format; the use of JPEG and especially PNG formats is recommended; vector pictures are also preferable to bitmaps pictures

Rule 3: adopt the suitable color setting; a decrease in the number of colors, or even the use of a grayscale picture, is likely to decrease the size of the picture


Return to the text zone of the repository

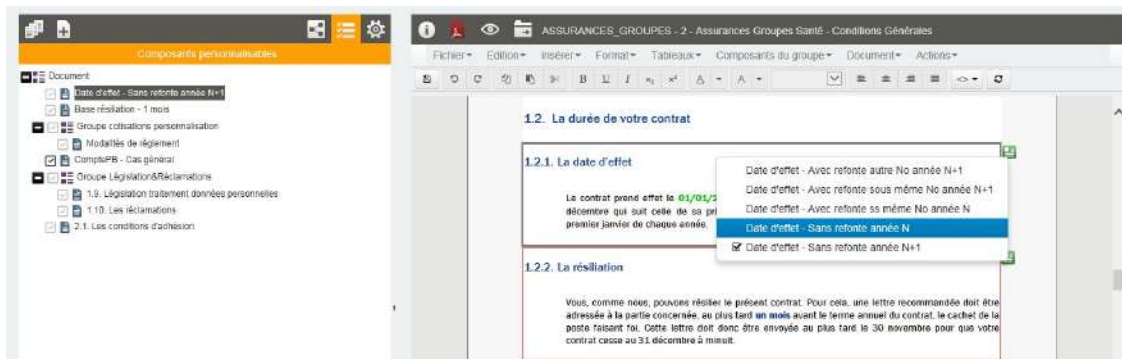
If the "Allow refreshing personalized text zones" parameter of the Document production view, is set to "Allow" in the profile view configuration configured in Ksl Admin, it is possible to replace a personalized text zone by its original content of the repository.



In this case, the icon  appears next to the personalized component. Click on this icon to replace the personalized content by the reference one.

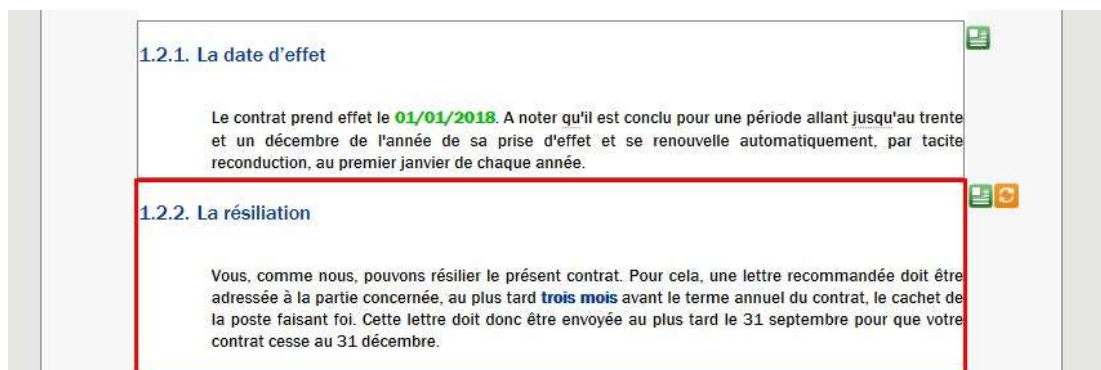
c. The alternatives


A multiple choice menu can be defined for a text zone or a group of text zones. This choice is materialized by the icon .



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

The content of a text zone with alternative can be personalizable (red borders) or not personalizable (gray borders).



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

d. Remove the components

Text zones and groups are potentially deletable.

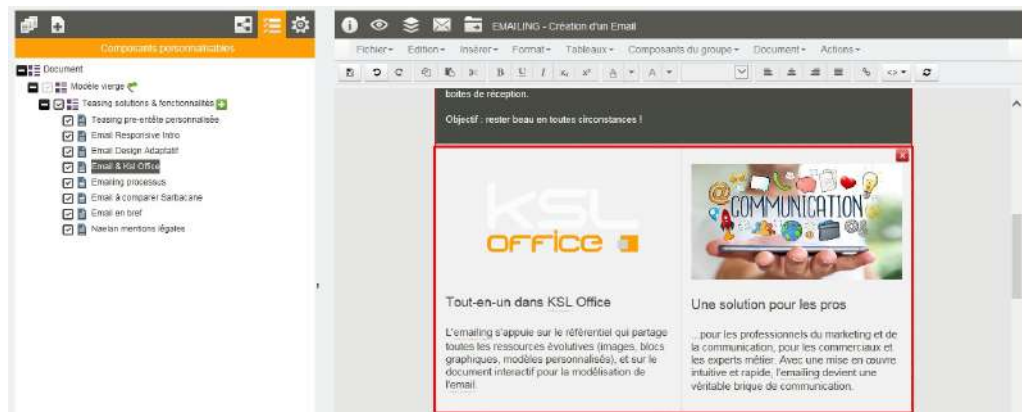
This deletion is an action which can be configured:

- in the properties of the text zone or group in the document template via Ksl Studio
- in the properties of the text zone in the group of the repository via Ksl Office

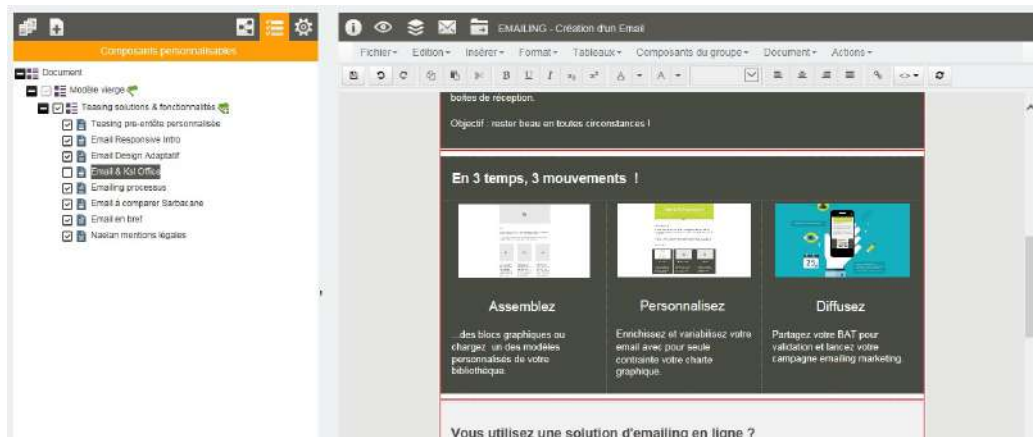
This action applies a logical or physical removal of the component of the document.

Logical removal

A red cross icon appears at the top right corner of deletable components.



Click on this icon to remove the text zone of the document.



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

Physical removal

Right click on the component in the document and select "Remove text box":



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

e. The variables

The value of each variable inserted in a text zone appear in green in the preview of the document.



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

It is not possible to declare new variables in an interactive document. Only the already declared variables can be inserted.

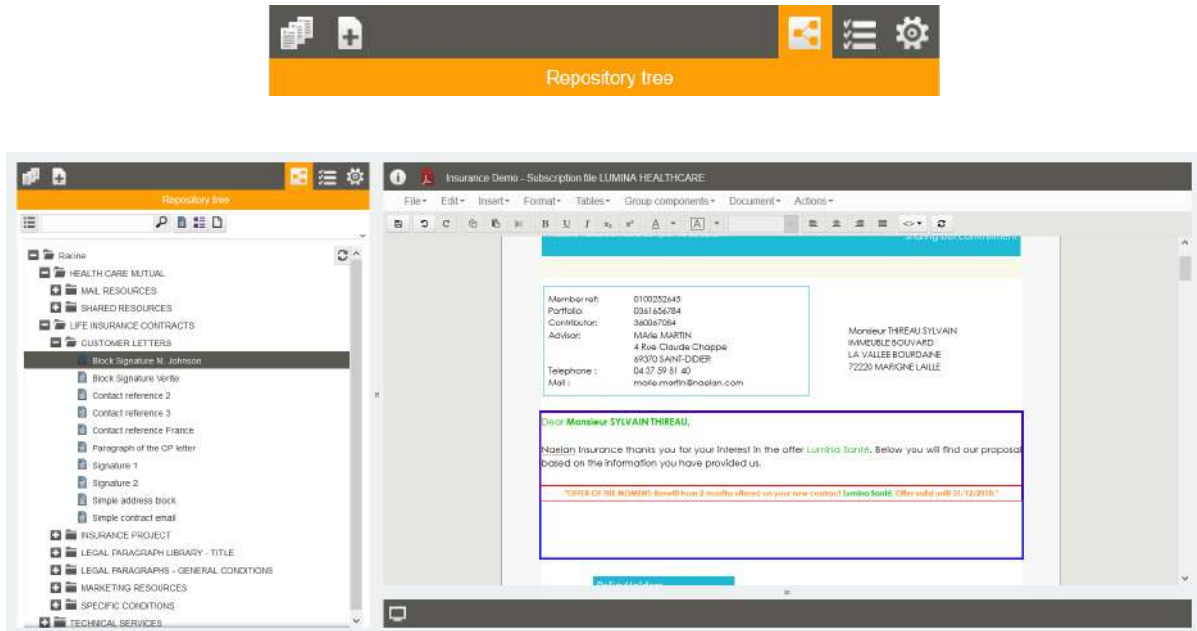
8.6. Build the document in a group

A personalizable group in an interactive document allows to build the document from components of the the repository, beyond just modifying content.

The group can be filled by default with a minimum of text zones, but it can also be presented empty to allow the user to insert and assemble components or create new components specific to his document.

To enrich a group, you need components like Text zones, Groups of text zones and External files, available in the repository. The components of the repository can be viewed and inserted from the Repository tree view, displayed on the left side of the screen.

Only components on which the user have access rights, appear in this view.



a. Assembly the components

The assembly of the components in a group follows the same rules as the creation of a group in the repository:

- the text zones and groups in the repository can be inserted, either via a drag & drop from the repository tree to the group, or by right-clicking on the group, directly on the document. Adding a component via a right-click allows to preview the component before inserting it.
- text zones 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 a drag & drop of the component to the target location
- from the list of customizable components, by a drag and drop of the component to the target location

The components added are potentially deletable, either logically or physically.

c. Variant behavior within a group

Whatever the level of the group or sub-group where a text zone has been created, its variant corresponds to the value of the criterion of the master/root group, and not a sub-group one.

For example :

- The master group uses the "agency" variant criterion: i.e. some text zone exist only for the criterion "agency=national", and some others have the default variant 'national' but also some specific variants for agencies (agency=agency1, agency2...)
- This group contains a sub-group describing local customer references
- This sub-group will contains the "agency" variant of several text zones
- This sub-group will contain the default "national" content if the agency content does not exist

Note that...

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

8.7. Add appendices

It is possible to add PDF files to the interactive document, but only in a group authorized for modification, between two textzone, on the top or on the bottom of the group :

- by drag and drop from the repository plan or *Right clic/ Insert repository pdf*
- *Right clic/ Insert local pdf file* to insert a pdf available on your computer
- *Right clic/ Insert URL referencing PDF file* to access a PDF available on a web address ; the http and https prefixes are allowed.



Inserting a pdf document causes a page break on the current document.

It is integrated in the list of its components or in its summary view, according to the chosen presentation.

The appendix can be deleted physically or logically on the same principle as the internal components of the document.

Automatic refresh of the download URL

If the URL of the appendix added to the document is modified in the repository, this update will be automatically reflected on the interactive document when it is updated or reopened if it is archived.

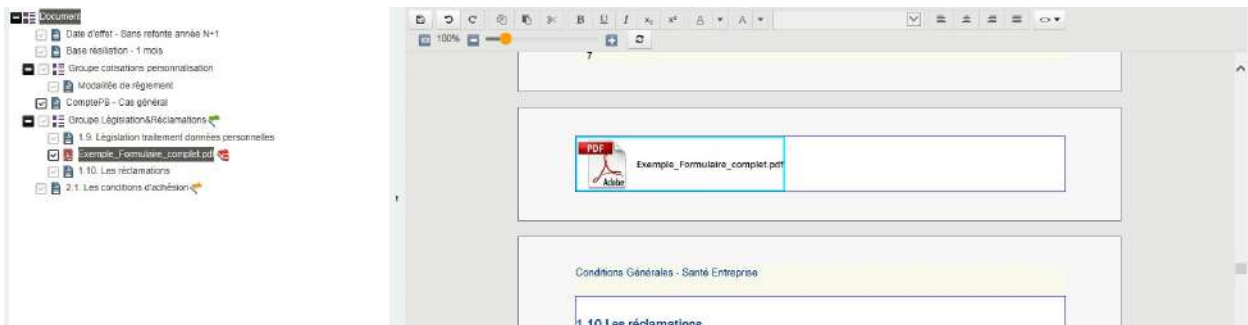
Error management

This can happen when the browser is closed while the download is in progress, or the URL is pointing to an appendix that no longer exists.

In this context, only the logical link in the appendix is retained; the PDF file is not physically present on the server, so it can not be exploited to generate the global document.

The anomaly is detected when previewing the document in PDF format

- The interface proposes to re-download the files and gives a clear warning message by pointing the problem file
- By refreshing the document, on the summary (or the list of customizable components), a red flag appears next to the PDF concerned



To download the PDF again, on Document tree:

- Right click on the PDF (the component with a red flag)
- Select Properties, modify the URL (or not) then click on the Refresh button to restart the upload

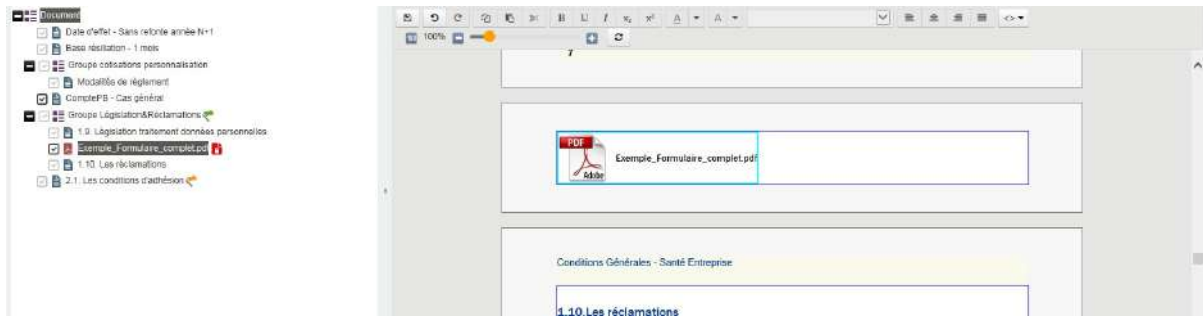
Protected PDF

Only not protection PDF can be inserted in an interactive document.

A protected PDF creates errors during the assembly, renumbering or selection/deletion of certain pages. In case a PDF is protected, delete the PDF from the interactive document and replace it by not protected version to solve the problem.

The protection of the PDF file is detected:

- In the PDF preview of the interactive document, if it is a file already inserted in the interactive document on an earlier version of KSL Suite (without protection control), the interface displays a clear message. A Refresh action will show the "locked document" indicator next to the PDF component. It is not possible to generate the global PDF document until the file has been deleted or replaced.



- If the url of your external PDF file 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 action will bring up a red flag indicating the file is corrupted. You will need to point the URL to a new unprotected file.
- During the upload of the external PDF file, a message is given at the end of upload if the file is protected and the external PDF file is deleted.

8.8. Update the content of an interactive document

Updating an interactive document, whether in progress or archived, consists in voluntarily updating its content from the referenced content (from the repository).

Consequently, updating potentially affects all of the shareable texts deposited on the document.

a. Freeze the document

The interactive document must be frozen to keep its content at time T, whether it is being personalized, validated or archived.

This action makes it possible in particular to preserve the integrity of a contractual document, while keeping the document "alive", that is to say the possibility of further personalizing it or updating legal elements during a re-subscription by example.

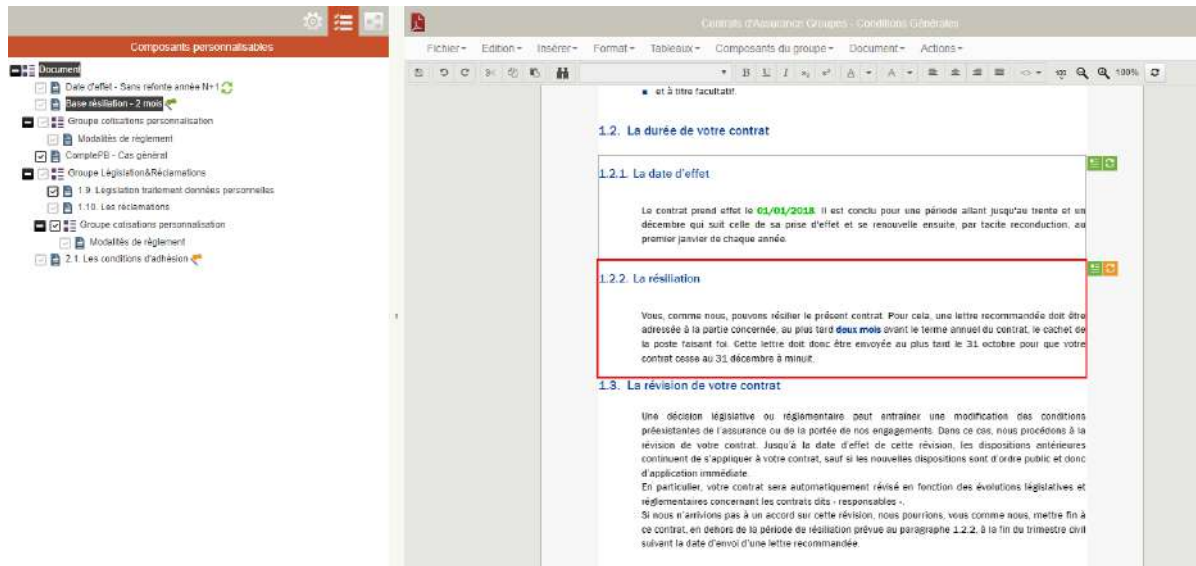
The system service "FreezeInteractiveDocument" is used in this context. It will be the subject of a "Freeze document" action in the action group associated with interactive documents (KSL Admin).

On the interactive document, the user will click once on this action then the document will be automatically frozen with each new backup.

It is also possible to freeze the document more implicitly, on a send action in the workflow or archiving ("FreezeDocument" option of the interactive document archiving service).

b. Update individually

There are two component-by-component update actions, the indicators of which are directly visible on the document:



Return to the reference version

Applicable on all custom text boxes.

This button appears to allow the user to replace the personalized content with that of the repository.

Click the button to resume the text area of the repository.

Access to this action can be configured in the Office profile configuration (Ksl Admin)



Update content

Applicable on non-personalized customizable text zones, only if the update date of the text zone in the repository is higher than that present on the document.

This button indicates to the user that an update is available for the targeted text area.

Click on the button for the actual update.



Update indicator

Visible on the list of customizable components, it is the equivalent of the icon for updating the content on the document (not clickable).

This indicator makes it possible to navigate very quickly towards the components to be updated



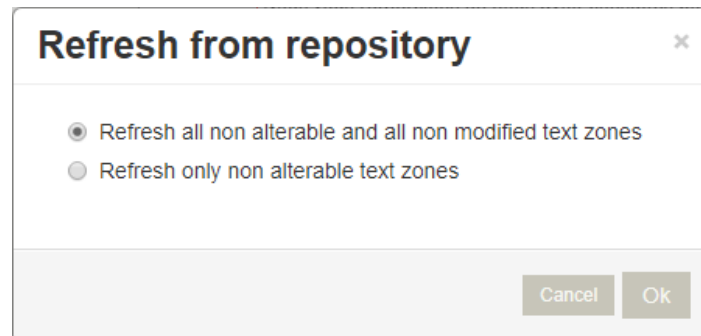
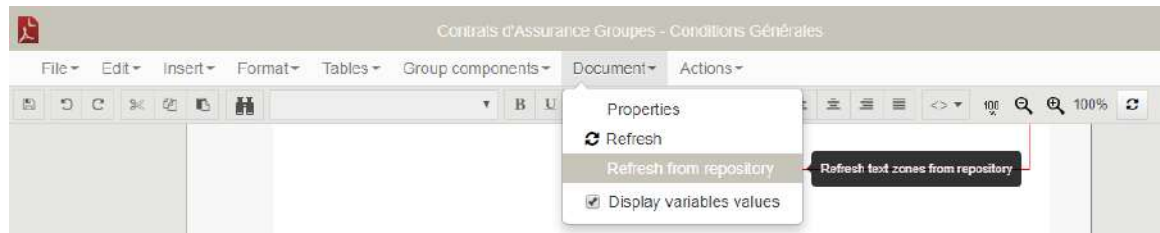
Note that

These actions are also applied to the alternatives as well as to the displayed variants.

c. Update the entire document

Two global actions are available, via the editor menu, to allow rapid updating of the entire document.

Document / Refresh from the repository



The check box "Refresh all non alterable an all non modified text zones" allows you to update

- all "fixed" text zones, not modifiable
- and all unmodified editable text zones
- There remain the custom text boxes which will be updated individually.

The check box "Update only non-alterables text zones" allows to update

- all "fixed" text zones, not alterable

The customizable text zones, personalized or not, will be updated individually

Additional validation is required for both treatments.



The result of the processing is immediately visible on the current document:

- When the first processing is started, the content of the text boxes with a green refresh button is updated, and the refresh button disappears at both from the document and from the list of customizable components.
- The fixed text is immediately updated in both contexts.

d. Use case: Updating a contract.

The contract is a document that the advisor must personalize for his client. A large part of this document is available in read-only, because of the legal and legal notices, and the institutional information of the company.

When the advisor produces a new contract, the interactive model assembles the content according to business rules impacted by parameters or data flow. The entire content comes from the repository.

- When the advisor personalizes a text, he always has the option of returning to the repository version  .
- As long as the contract is in progress, it is not frozen; which means that it implicitly inherits the last modifications made in the repository. This concerns non-personalized content and read-only content.
- If the advisor has a "Freeze" action and decides to block his contract at time T, the content of the document is no longer impacted by the repository
 - In this context, updating the document becomes explicit. When reopening his contract, the advisor has indicators  to update non-personalized content individually, if a more recent version has been detected in the repository.
 - If it has been enabled, it also has two options which allow a quick global update of the contract (read-only and / or non-personalized content), from the latest versions of the content available in the repository.

The update options available are identical, whether the interactive document is

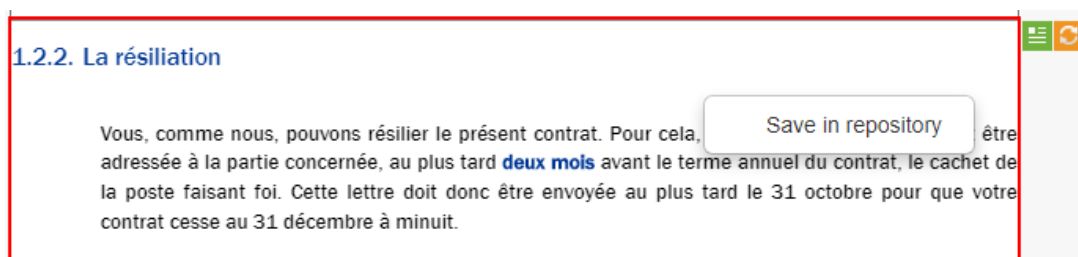
- in progress and frozen via the action button
- or frozen when archived, and opened again after a more or less long period

8.9. Update the repository using personalized content

If the parameter "Allow saving text zone in repository from Interactive Document" is set to Yes on the view in the profile configuration (KSL Admin), it is possible to update the repository from personalized content on the interactive document.

This function allows you to create a document with coherent content, which is sometimes easier to complete than a set of discontinuous text areas in the repository. It avoids a postponement by offering an automatic update, in one click, of the selected content.

The action "Save in repository" is accessible on the right click menu, on a personalized text zone.



Click on the action to save the new content of your text zone in the repository

Note that...

Since it affects the content of the repository, this update will potentially impact all documents that share this same text area.

The special case of variants

On a project with "agency" variants (for example), when the document is created in agency 01, the update will never affect the reference variant (that of the head office), even if the latter is presented and customizable on the document.

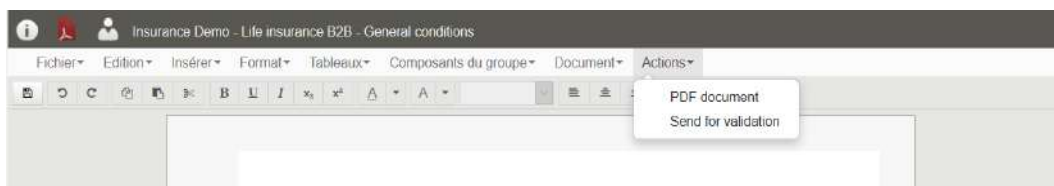
In the repository, the action will create a variant "01" of the text zone with the personalized content, from the agency code present in the user properties.

8.10. Actions on the document

The top bar of the document provides a set of action buttons configured for the interactive document. This bar is configured according to the user's rights (or his groups) and can also vary from one document to another.




The graphical buttons do not necessarily represent the exhaustive list of actions possible on the document; these are generally the most commonly used actions in business processes. The complete list of actions provided is available on the *menu/Actions* where an action can be selected in a list.



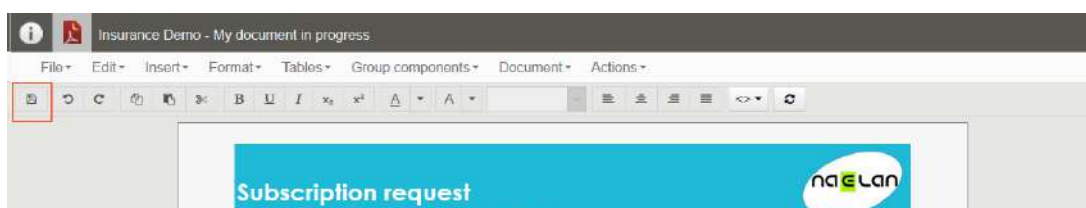
Note that...

The actions on the interactive document presented below are only examples of actions. Each action buttons can be completely configured according to the context.

a. Save

This action is the first available on the standard toolbar .

This action allows the user to save the document.



At the first saving, it is mandatory to give a name to the document. The comment is optional but useful in case of sending the document for validation or when a user personalizes an old document.

The information about the document can be edited by clicking on the "Information " button, i.e. the first action button of the document bar.



Note that...

It is possible to create a specific action that automatically set the mandatory name, save the document and if necessary deliver and archive it.

b. View

The preview of the document presents the final document generally in the PDF format, to provide the user a quick access for a local saving or printing.



If the document contains a large number of pages due to many external PDF components, the number of pages of the final PDF and the time necessary to download it can be long. To avoid this problem, it is possible to set an action for previewing the document without the external PDF files.

Some processes require previews in another format, e.g. Word, to get a document in a format editable by an external tool, or HTML for responsive email bodies (email management, marketing or commercial). In this case, a generic button is usable (icon "eye").

c. Print

The print button can be used for different processes: local printing, queuing for mail mass production, etc. This action, if used for a centralized printing, can queue the document and remove it from the Document list user's view.



d. Send to another user

This button removes the document from the Document list user's view and sends it to:

- Either to a validation workflow: the document is then available for a validator in a Ksl document view.
- Or to redaction workflow: another user can continue the personalization process with his own rights and needs.



In both cases, the interactive document is available for editing in a Ksl view, potentially by another user who can modify other parts depending on his profile.

e. Deliver



This action allows to deliver the document or sent it by email:

- If the recipient's email address is specified in the customer's data transmitted to the document, the address is directly usable by the action.
- If the email address is one of the document parameters, the address is directly usable by the action and can be changed before launching it.
- If the email address is not available, the user will be asked to provide this address when the action is launched.

There are two possible processes when sending an email:

- sending the document as an email body (which is the case from the view "emailing ")
- sending your document as an email attachment

f. Archive



When archiving a document, the document is removed from the Document list.

Archiving can be done in several formats depending on your business process:

- Archiving in an interactive format: the document is still editable in the archive. It can be changed (e.g. an old contract with a customer has to be changed)
- Archiving the document for queuing it: the document is archived in its KSL specific format (.ksd), generally temporary, until it is bundled with other documents and printed.
- Archiving in a final format: the document is archived in PDF or Word format.

9. Archiving and Workflow

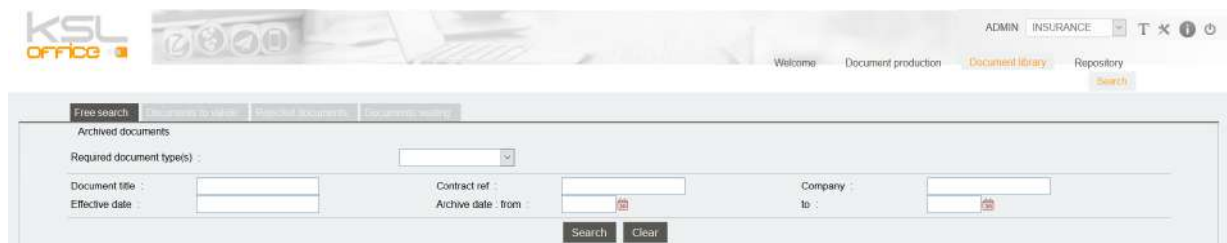
Archived documents can be:

- Consulted by users via KSL Office, according to users' rights
- Managed by "post-production" scenarios for a multichannel delivery, archiving...
- Moved from a workflow view to another through validation or redaction workflows

9.1. Archived document

a. Search

The first tab accessible in the Document library view is the "Free search ". This is a general search function to search documents according to criteria in all archived documents, regardless of their nature or date of archive. This screen shows a set of search criteria and the list of documents resulting of the search.



Note that...

When a very large volume of documents are archived, some criteria and if possible very discriminating criteria have to be provided to avoid a very long searching time. Note that the maximum number of documents returned can be configured at the project level to limit this delay.

If the number of documents retrieved is greater than this maximum number, a second project parameter "Limit free search" allows to trace an explicit error to the user.

The search criteria

The first criterion is the type of document (invoice, contract, annex...); the user can select it from the predefined list.

The search criteria and the columns of the document list are adapted when selecting the document type.

The criteria are functional properties (contract N^o, customer reference, State in workflow...) and system properties (archiving date, document title,...) associated to the document; each document is archived with its identity card that contains these properties.

Note that...

Document types and their properties are configured in KSL Admin.

The document list

Click on "Search" to launch the searching process; the document appear in the list.

Each column is potentially a sort criterion: click on the label of the header of the document list view sort the document in an ascending or descending sorting.


<input type="checkbox"/>	Contract ref	Label	Company	Effective date	Archive date	Workflow status	Document title	Owner
<input type="checkbox"/>	CG70-4422	Prévoyance Groupe - Conditions générales	SYLLAGE SA	01-04 00.00.00	07-12-2018 17:51:05	A VALIDER	PrevoyanceGroupe_ConditionsGenerales_BB14BE3C-7F985B86-AB660157-89948E22	ADMIN

Some action buttons are accessible under the document list.

"Validate" for example in the screen below.

In this context, each action is mono or multi-selection (check-boxes).

b. View

On the left-side of the list, click on the icon  to view the document.

You can then access to the document's details: its pages as well as identity information

The document is displayed in PDF. The right side shows the list of properties. Only the comment is editable.

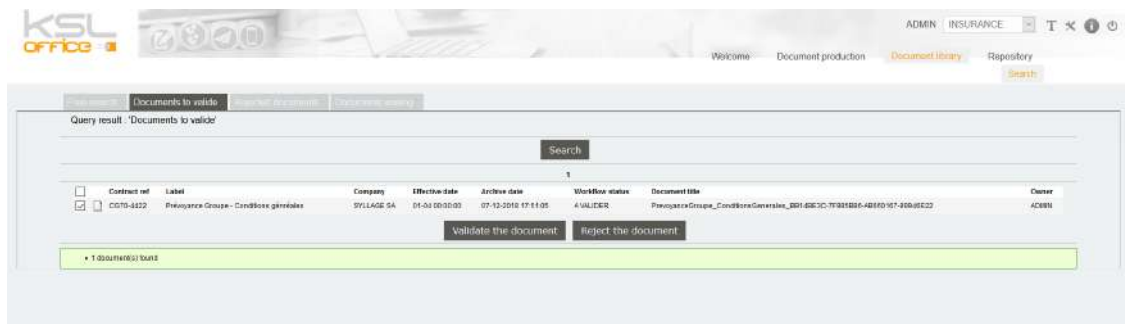
Some action buttons are displayed in the document details view. The "Validate the document" button in the example above for example, allows to change its validation status.

The "Return to list" allows to return to the document list view.

9.2. The predefined views

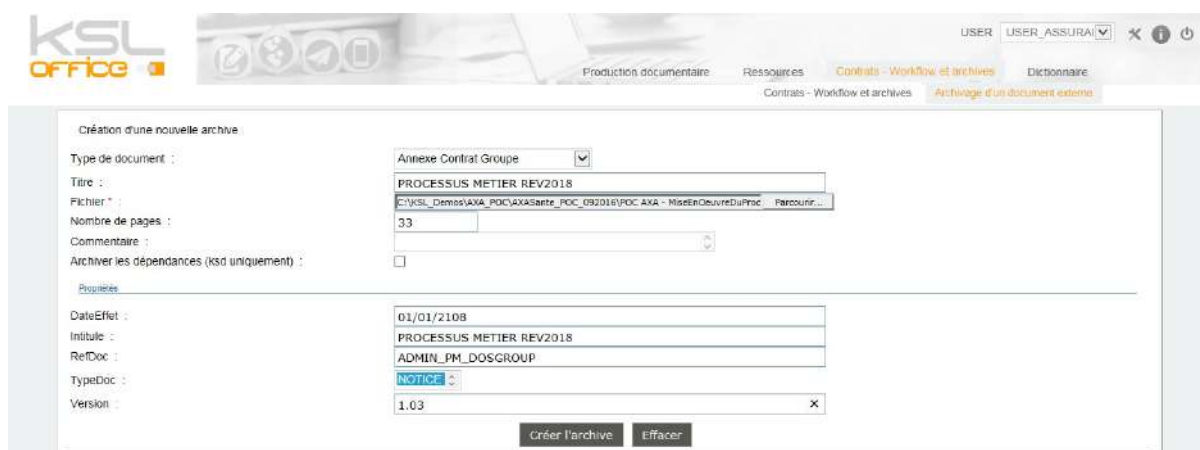
The predefined views are tabs set in KSL Admin which implicitly contain documents corresponding to predefined criteria: e.g. contracts to be validated, last files, last invoices...

A predefined view does not present some search criteria but directly the list of documents resulting of a predefined query.



9.3. Archiving an external document

While archiving is mostly related to documents produced by KSL suite, it is also possible to archive any types of external documents, e.g. brochures, annexes, etc..



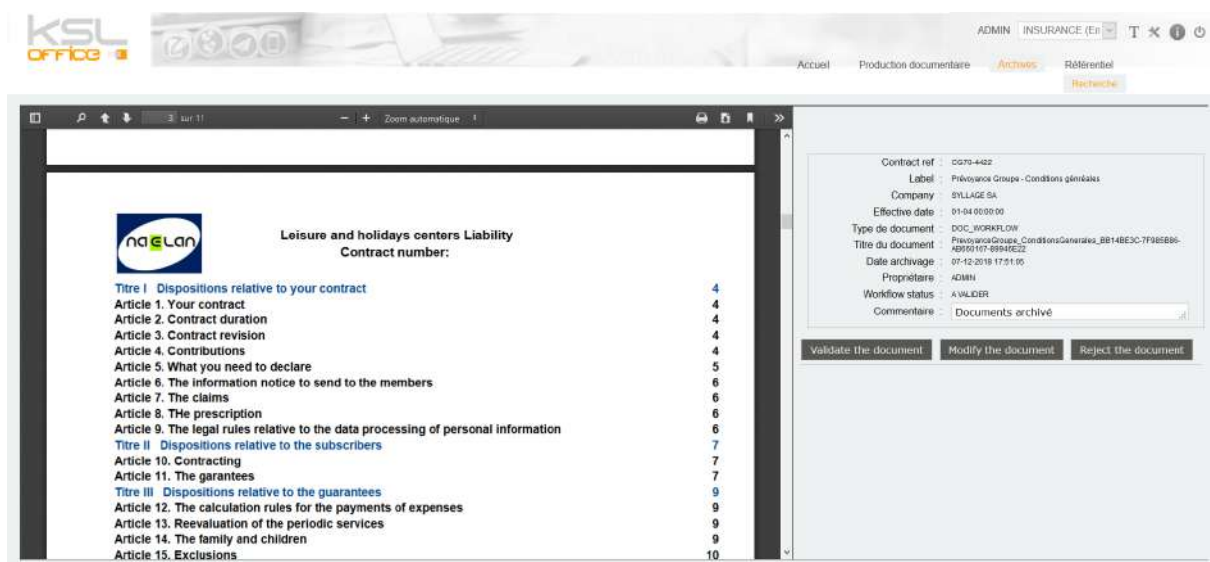
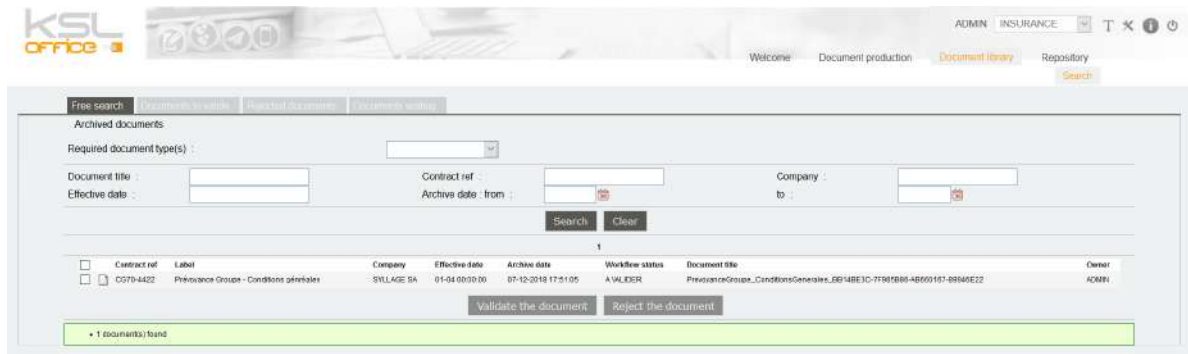
The "Archiving an external document" tab can be added to the Office view with Ksl Admin.

Enter the document informations; the mandatory fields are identified by a red star.

- Document type: chosen in the list; external documents often correspond to different dedicated types.
- Document title

- Page number
- An optional comment to describe the document
- The dependencies archiving if the document is ksd file
- The functional properties configured for the document type

And the "Browse" button allows to select the external document.



9.4. In a workflow

A document transmitted in a workflow is characterized by a state. These are collaborative interactive documents.

The document is unique and integrates into the workflow, regardless of its workflow step and circulates in a linear way by changing state.

Users have different rights on the document: Validate (or Reject), Review, Complete, Deliver, Archive...

a. Validation workflow

This validation circuit makes it possible to dematerialize the decision-making process. The document is

forwarded to one or more decision makers who can validate, reject, request changes or modify them before delivery.

At each step of the workflow:

- the state of the document changes

the document is stored in predefined view, and is accessible to an authorized user profile: these views can for example be "the documents to validate", "the documents to deliver", "the documents to review", etc.

the user has actions adapted to the document state: "validate" or "reject" for a document to be validated, "modify" for a document to be reviewed, "send" or "archive" for a validated document, etc.

b. Redaction workflow

The redaction workflow allows the implementation of a collaborative process to create and personalize documents; this process remains sequential to avoid a double access to the same document.

10. The translation dictionary

The translation dictionary is accessible if the Dictionary View has been configured in the user profile. This dictionary is either shared by all projects of the Ksl server or specific to a project.

When a project is used to manage languages, the dictionary contains the translation of the labels used by the document templates, in the reference language (which can be chosen) and in the different target languages.

It is complementary to the management of variants, which can manage "languages" for components like text zones and groups.

The management of the translation dictionary is collaborative, especially useful if it is shared between projects.

This dictionary is accessible from the Office "Dictionary" tab:

- Select the reference and target languages
- Search for specific labels by keywords
- Hide optionally the already translated labels (keywords)
- Click on the Search button; the keyword are displayed in alphabetical order

The screenshot shows the 'Translations' section of the KSL Office interface. At the top, there are dropdown menus for 'Target country' (set to 'usa') and 'Reference country' (set to 'france'). Below these is a 'Keyword' search field and a 'Hide translated keywords' checkbox. A 'Search' button and a 'Clear' button are also present. The main area contains a table with the following data:

Keyword	Reference country	Target country
administrateur	Administrateur	Administrator
admission n°	Admission n°	admission n°
Analyse	ANALYSE	ANALYSIS
Assurances	assurances	Assurances
AUGUST	AUGUST	August
AUCUN N° SELECTIONNE	AUCUN N° SELECTIONNE	No filters selected
AU GROUPE	AU GROUPE	TO THE GROUP
ETABLISSEMENT TENEUR DU COMPTE A DEBITER	ETABLISSEMENT TENEUR DU COMPTE A DEBITER	TO THE USER
NOM, PRENOMS ET ADRESSE DU DEBITEUR	NOM, PRENOMS ET ADRESSE DU DEBITEUR	ANALYSIS
N° NATIONAL DEBITEUR - 508 217	N° NATIONAL DEBITEUR - 508 217	Document production analysis
AUTOMATISATION DE PRELEVEMENT	AUTOMATISATION DE PRELEVEMENT	

- Click on a keyword; its translation appears
- Modify or provide a translation
- Click on the Apply button

Modify translation - Target country : usa

Keyword	administrateur
Reference description	Administrateur
Translation	Administrator



NAELAN

Headquarter - 4 rue Claude Chappe
69370 Saint-Didier au Mont d'Or
France - Tél. +33 4 37 59 81 40

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

www.naelan.com
contact@naelan.com
support@naelan.com