

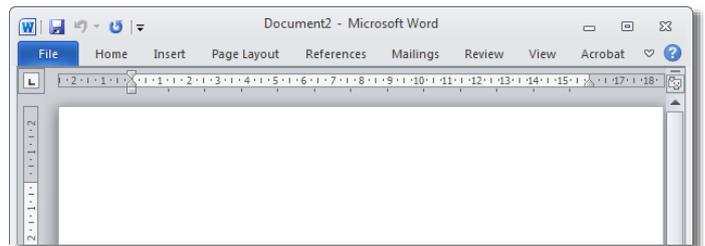
Creating document templates for the Work Manager app

To create a document template, you need to do the following:

1. Design the document template layout
2. Map the document template fields to the Work Manager app fields — **Only** required if you want the document template to be pre-populated with information from the Work Manager app
3. Add the document template to the Work Manager document library
4. *Optional* - Stitch document templates together

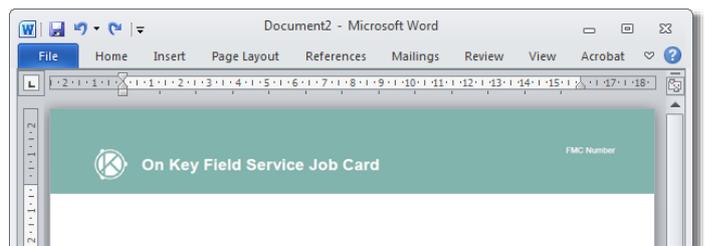
1. Design the document template layout

- a. Open your word processor and create a new blank document.



- b. Add the required branding to your document template.

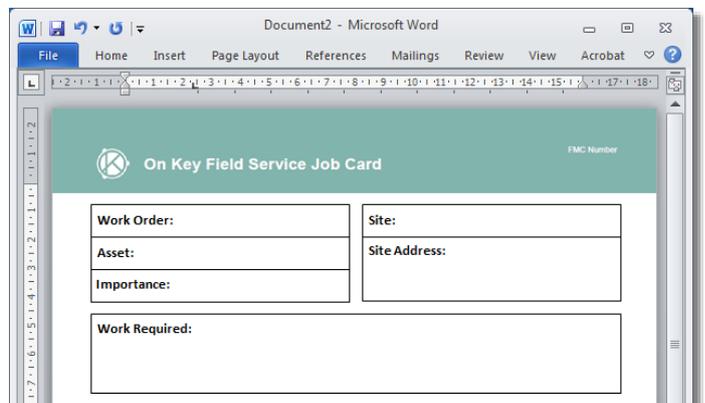
TIP: You can add your company logo, a footer, and header to the document template.



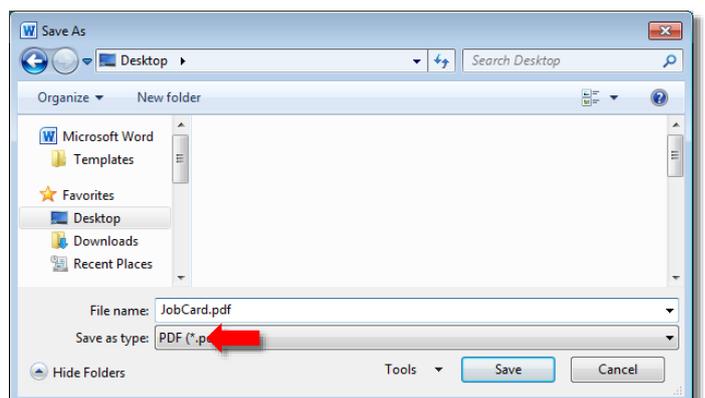
- c. Design your document template's layout by creating a 'placeholder' for each required field.

TIP: Using tables or shapes to create placeholders can give your document template a more structured appearance.

If using a table, create a table cell for each required field, and then add the required text labels. If using shapes, draw the shapes where you want to fields to appear, and then add the required text labels.



- d. Save your document template as a PDF document.



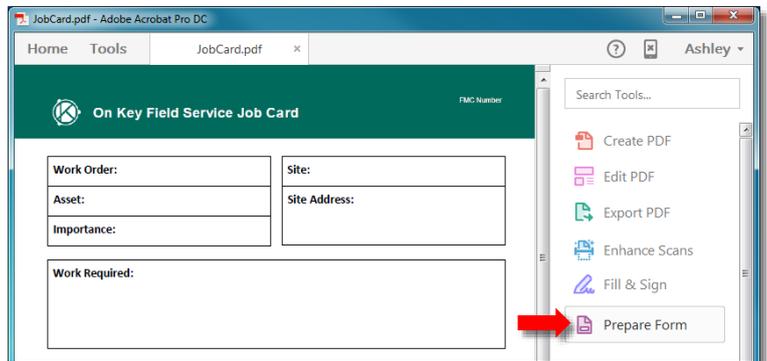
2. Map the document template fields to the Work Manager app fields

NOTE: You only need to perform this step if you want the document to be dynamically populated with information from the Work Manager app.

- a. Open your document template in a PDF editor.

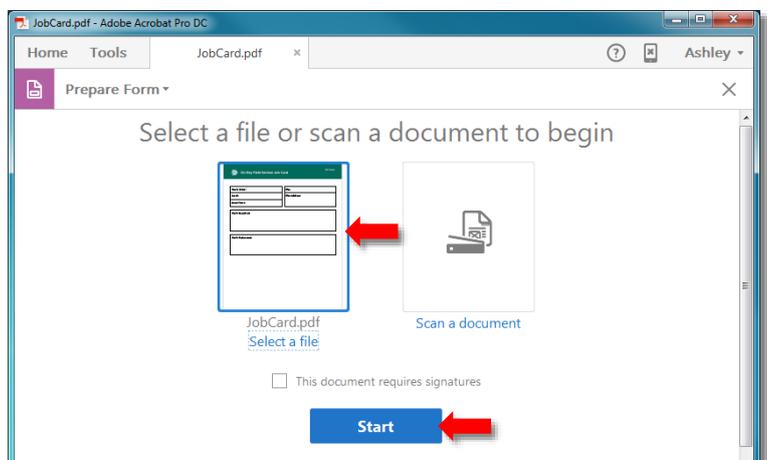
NOTE: This guide shows how to add and map dynamic fields using [Adobe Acrobat Pro DC](#).

- b. Click **Prepare Form** in the Tools panel to select the document that you want to add the dynamic fields to.



- c. Select your document template and click **Start** to automatically add the dynamic fields to the placeholders.

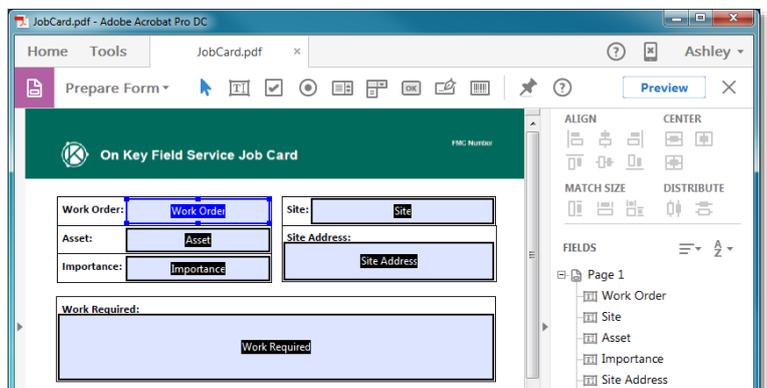
NOTE: Adobe Acrobat Pro DC will automatically create dynamic fields in the placeholders you created.



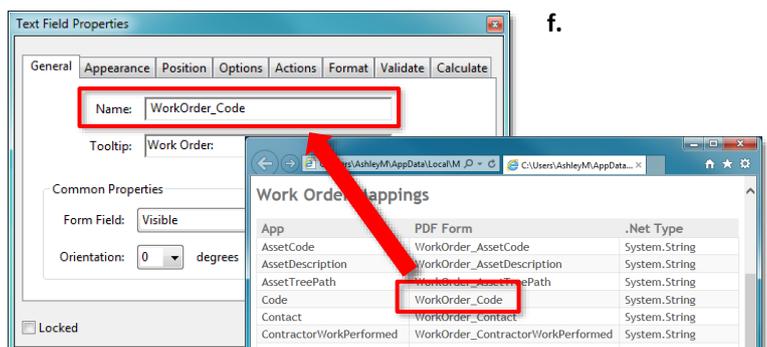
- d. Confirm that all the required dynamic fields have been added.

NOTE: To add a dynamic field manually, right click on the document and select **Text Field** from the pop-up menu, and then draw the field in the required location.

TIP: You can click a dynamic field and use the blue drag handles to customise its size and position.



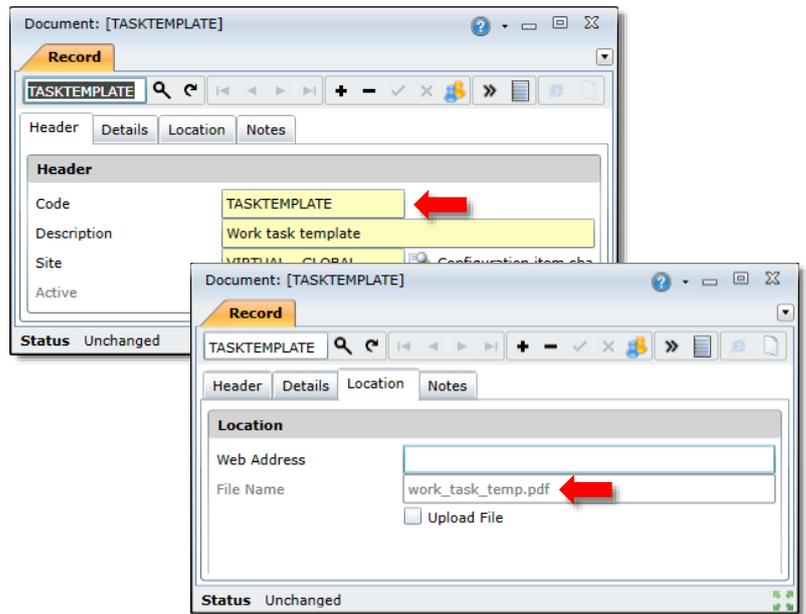
- e. Double click each dynamic field in the document template to open the Text Field Properties dialog box, copy the relevant field name from the **PDF Form** column in the Work Order Mappings table, and then paste it in the **Name** text box.



- g. Save the document template after you've added and mapped all the dynamic fields.

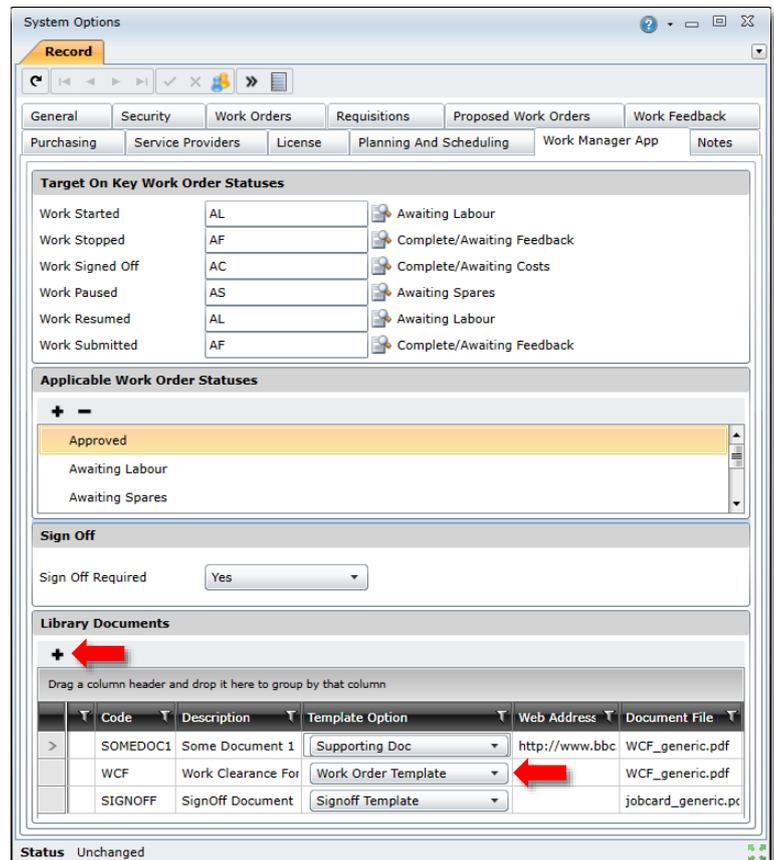
3. Add the document template to the Work Manager document library

- a. Create a new Document in On Key.
- b. Provide a document code and brief description on the **Header** tab.
- c. Upload the template PDF file on the **Location** tab.



- d. Open the System Options and select the **Work Manager App** tab.
- e. Click the **Add (+)** button in the **Library Documents** section to add the template to the Work Manager document library.
- f. Click the drop-down in the **Template Option** column and select the template type.
- g. Click the **Save Changes (✓)** button.

NOTE: You can only have one Signoff Template. You can have multiple Work Order Templates, Work Task Templates, and Work Task Spare Templates.



4. *Optional* - Stitch document templates together

Document template stitching lets you link multiple templates together to create one document. You can use this functionality to append a **Work Task Template** and/or a **Work Task Spare Template** to a Work Order Template or the Signoff Template.

NOTE: Ensure that you have already created the Work Task Template and Work Task Spare Templates and added them to the Work Manager document library with the correct **Template Option**. You can only stitch templates that have been added to the Work Manager document library as Work Task Templates and Work Task Spare Templates.

- a. Open Adobe Acrobat Pro DC.
- b. Click **Prepare Form** in the Tools panel and open the main template (Work Order Template or Signoff Template) that you want to stitch templates to.
- c. Right-click on the main template, select **Text Field** from the pop-up menu, and then draw the field **anywhere** on the template.

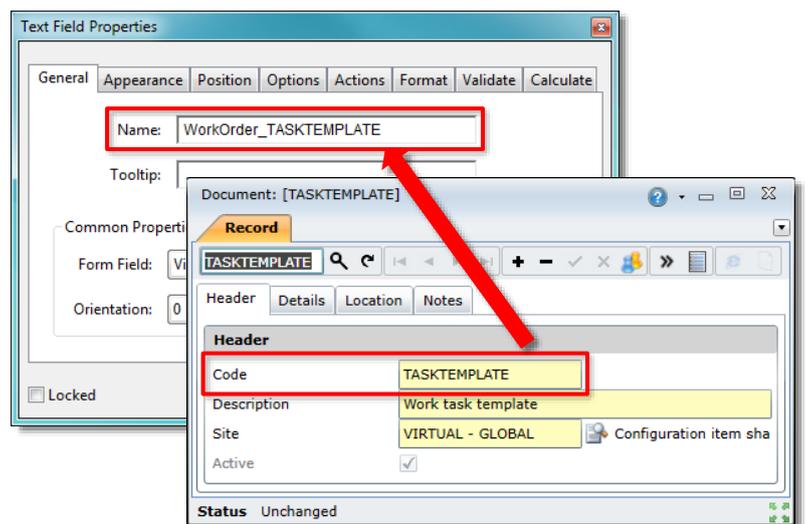
NOTE: This is a hidden field. It will **not** be displayed in documents generated from the template.

- d. Double-click the field to open the Text Field Properties dialog box.

- e. Type one of the following field mappings in the **Name** field, depending on the template you want to stitch in:

- `WorkOrder_TaskTemplateCode` – where `TaskTemplateCode` is the document code specified in On Key (step 3b).
- `WorkOrder_TaskSpareTemplateCode` – where `TaskSpareTemplateCode` is the document code specified in On Key (step 3b).

NOTE: You can stitch both templates to your main template. To do this, simply add two fields to your main template and then map them using the field mappings above.



- f. Save the document template after you've added document stitching fields.