

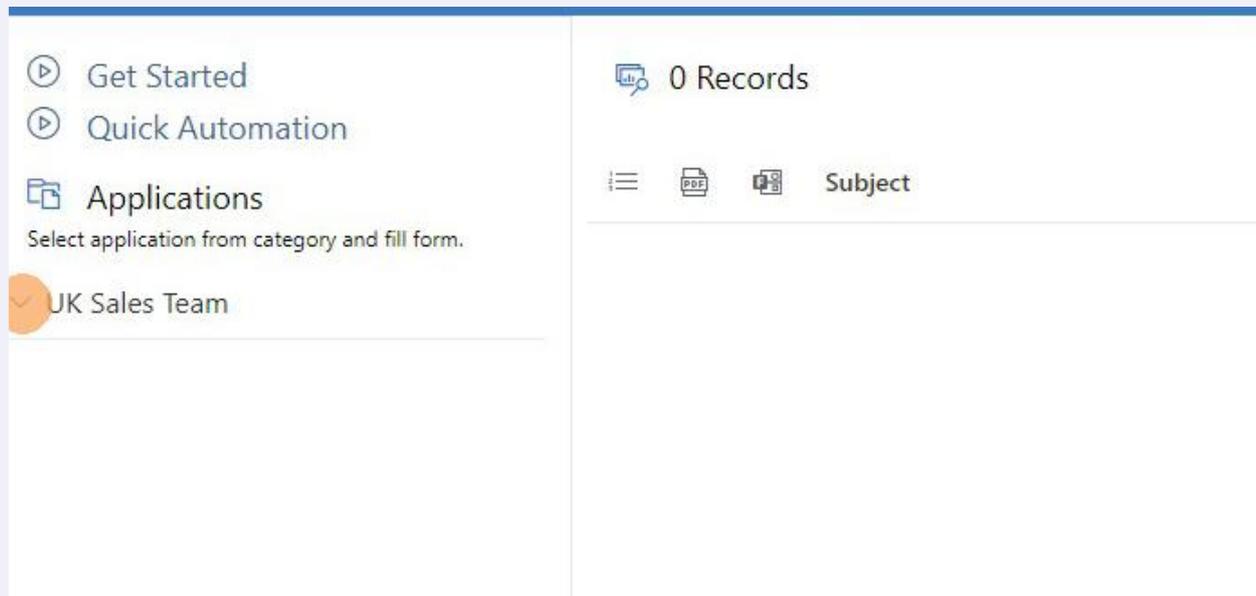
# 3. Automate It - How to Automate a Document



Having tagged and uploaded your document to Kim, this step-by-step will show you how easy it is to automate your document and enable the settings that allow Users to 'Send', 'Share' and collaborate with colleagues or third parties.

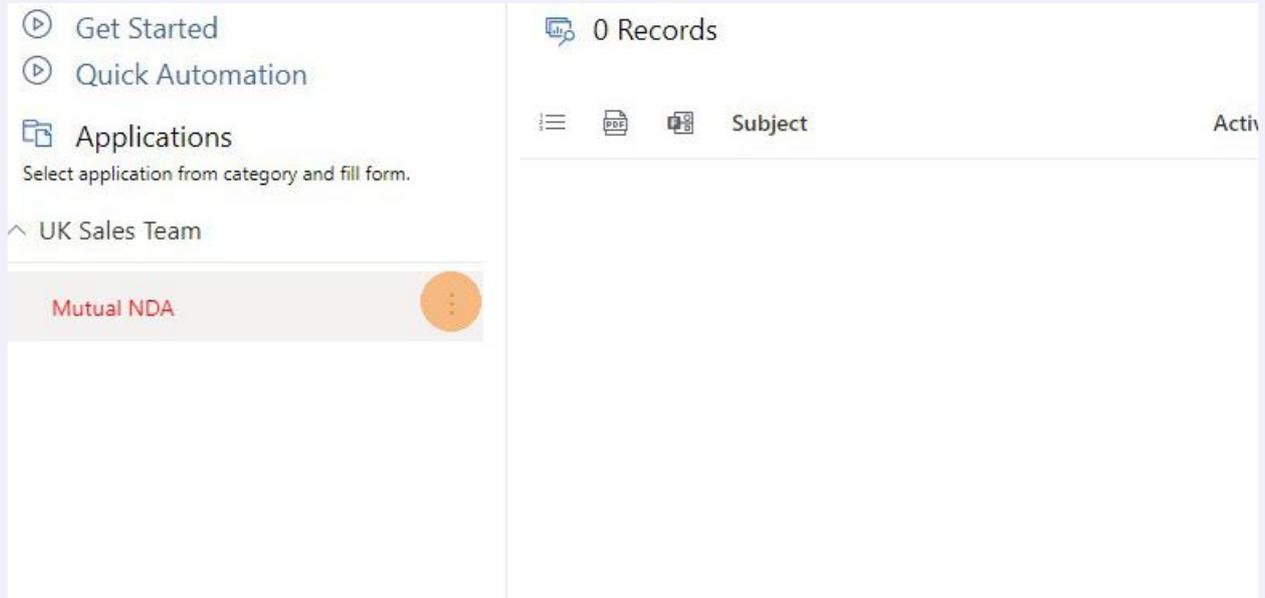
1

You have tagged and uploaded the document you want to automate. Select the Application heading it sits under (here it is 'UK Sales Team').



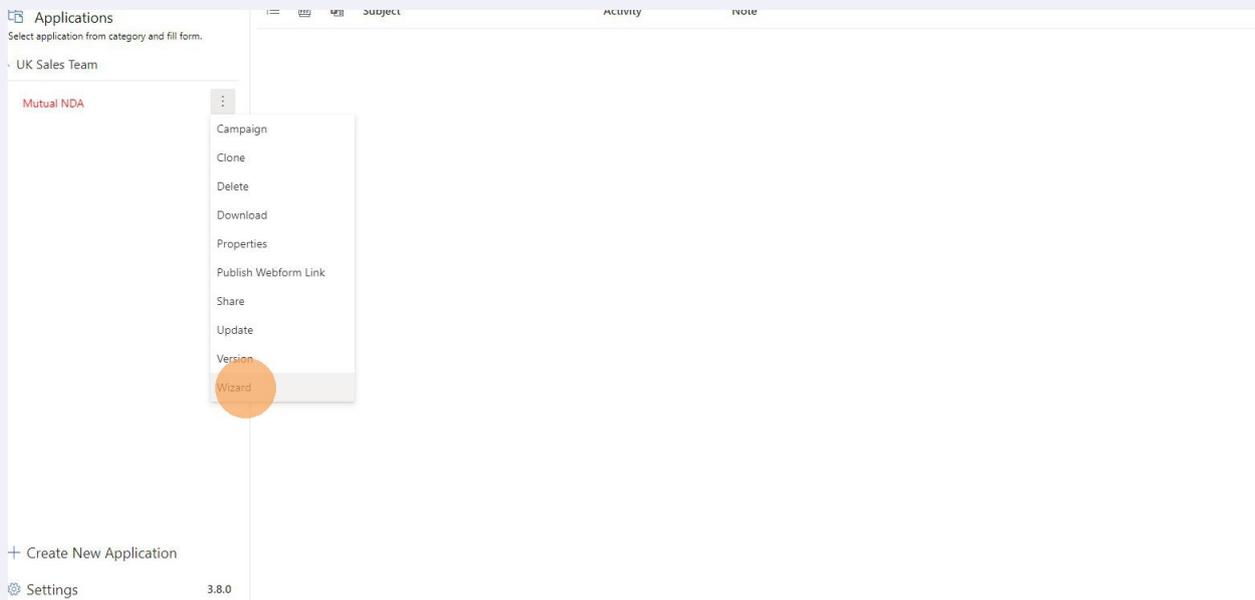
2

Select the document you want to automate. It will be in red at this stage because it has not been automated and made available to Users. In this example it is the 'Mutual NDA'. Click on the three dots and a menu will appear.



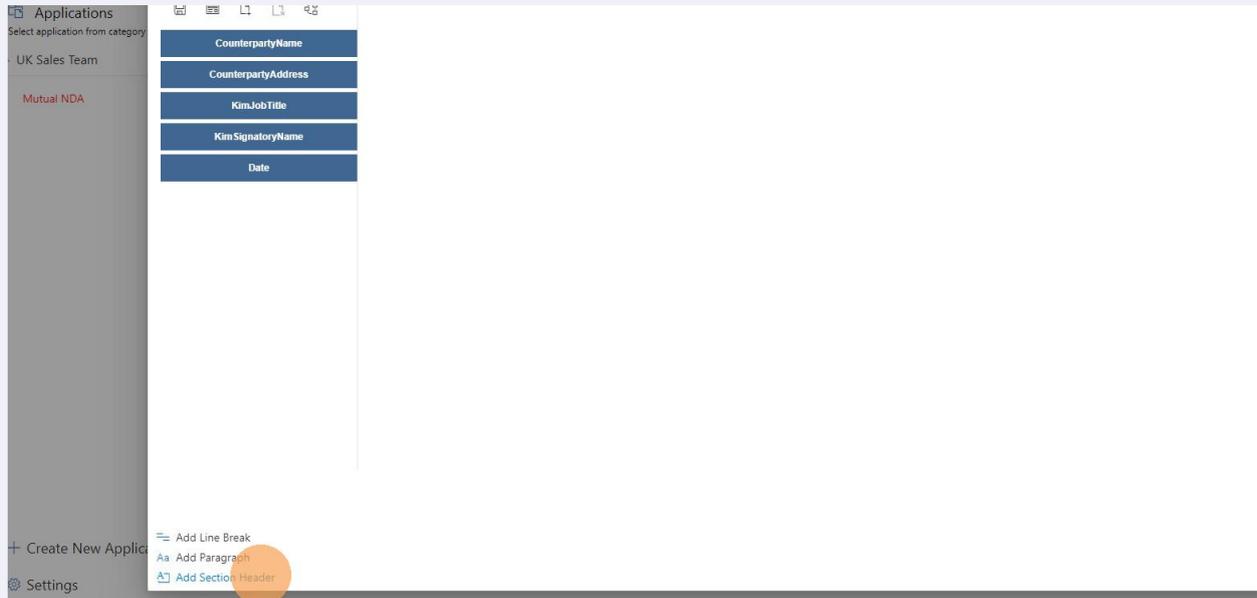
3

This is your automation menu. Select 'Wizard'.



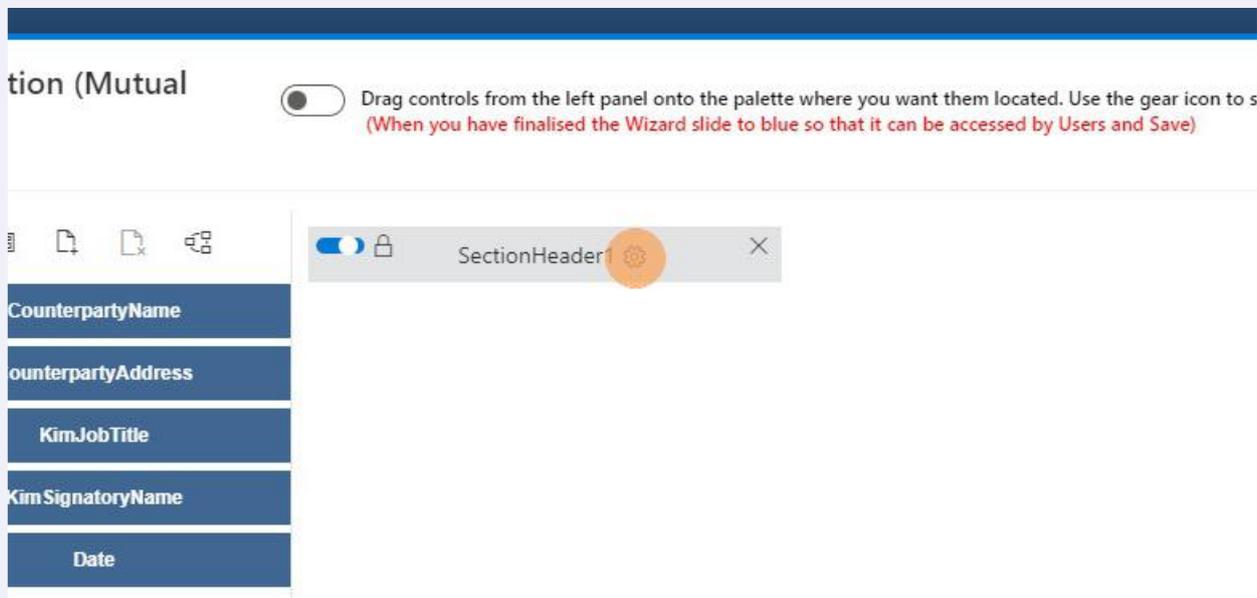
4

When you select Wizard you will see this screen. In the left-hand sidebar all the tags you put in the document you uploaded are now available for automation. To start, drag and drop the 'Add Section Header' to the top left of the screen.



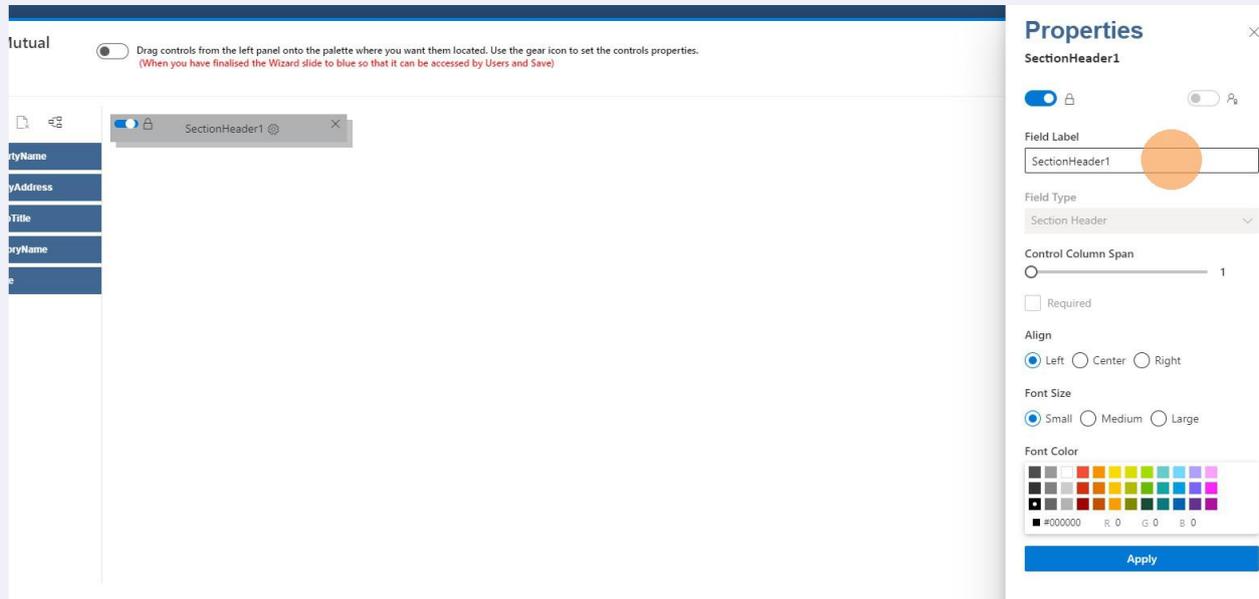
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Having drag and dropped the Section Header to the top of the screen, click on the cog.



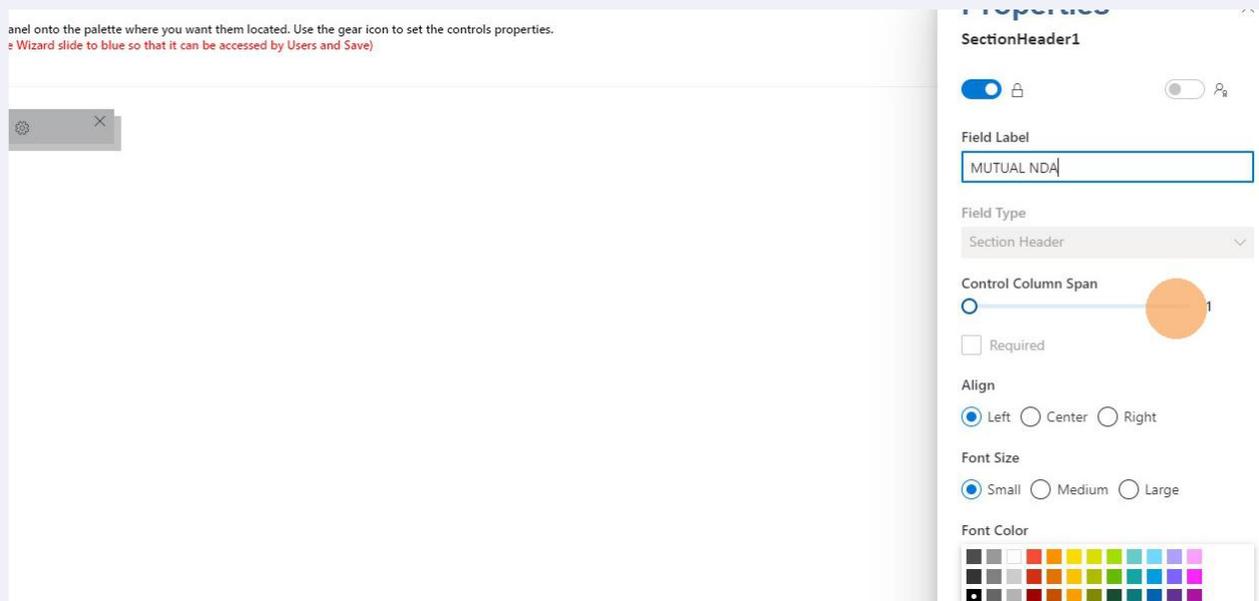
6

When you click on the cog the right hand menu appears. This menu allows you to set the properties for this field. TIP 1: When you click a cog different menus appear depending upon whether it is a 'Tag' that you created in the document or a 'Section Header' or 'Paragraph'



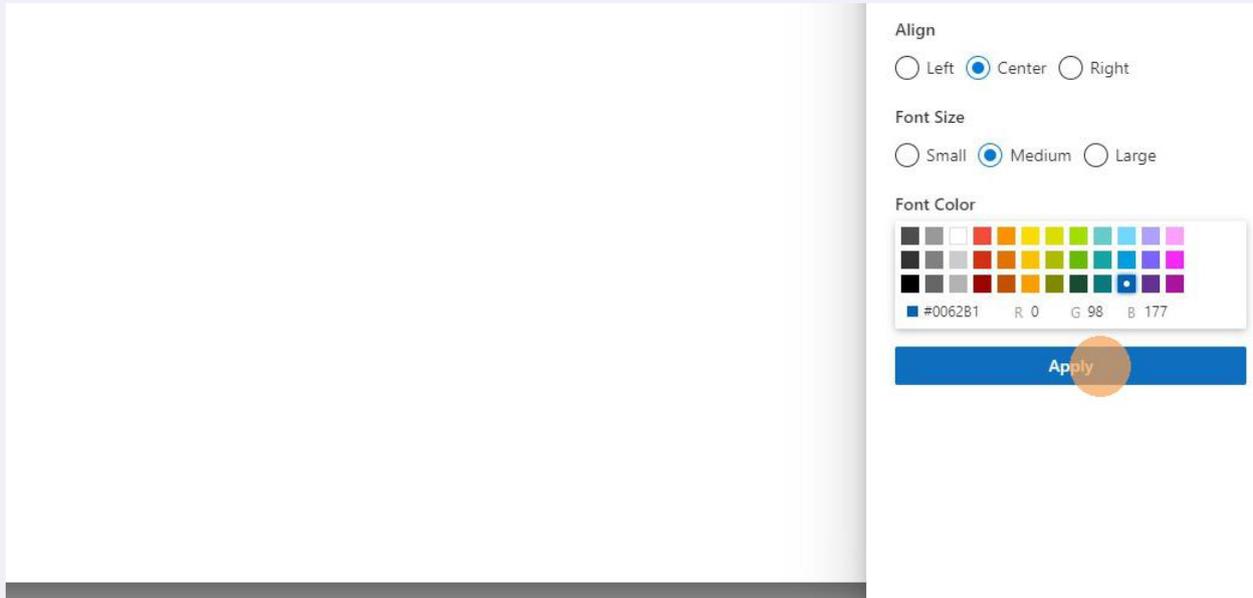
7

In the 'Field Label' type the heading for this form. In this example it is 'MUTUAL NDA'. TIP 2: Section headers at the top of forms can look good in capitals. Now select the 'Control Column Span'. This is in a range of 1 to 4. Select 1 and this sees the heading top left over one column, select 4 and it spreads the heading over the width of the form.



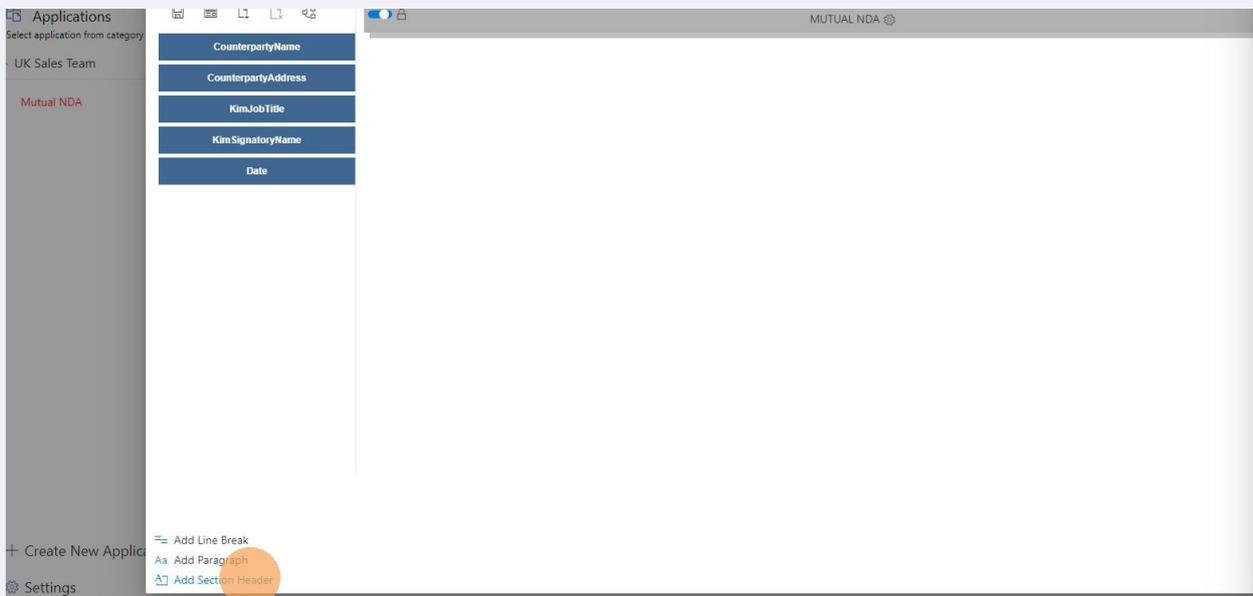
8

Having selected 4 for the Column Span you can now position the heading, select the size of the font and its colour. Having done this 'Apply' and your selections will be saved.

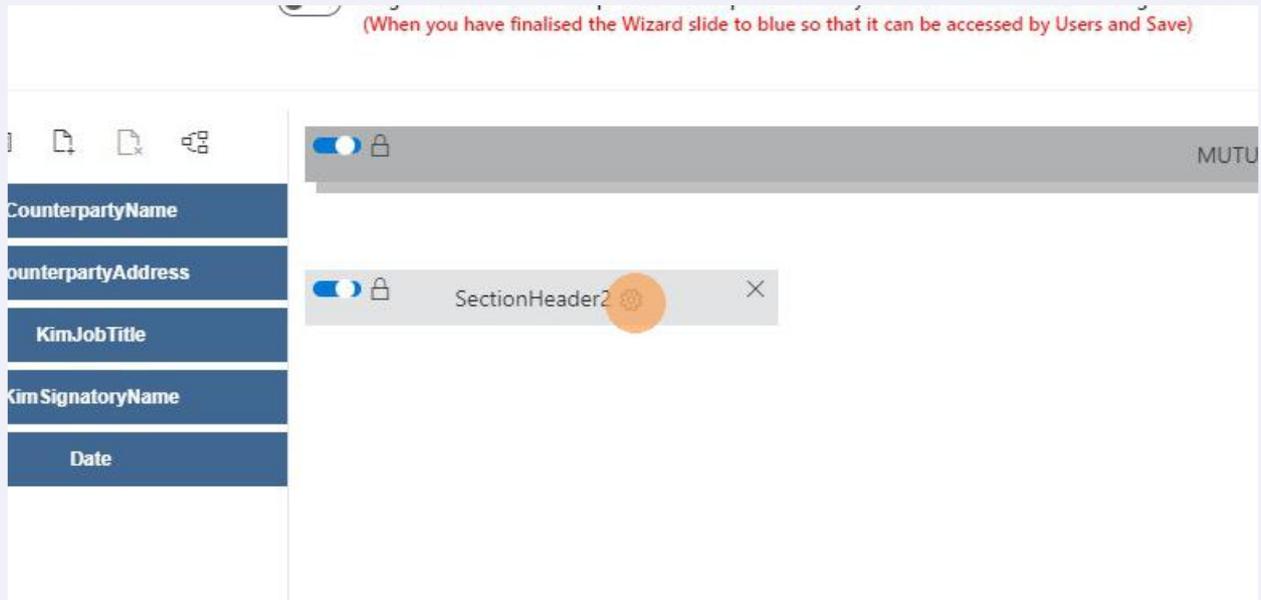


9

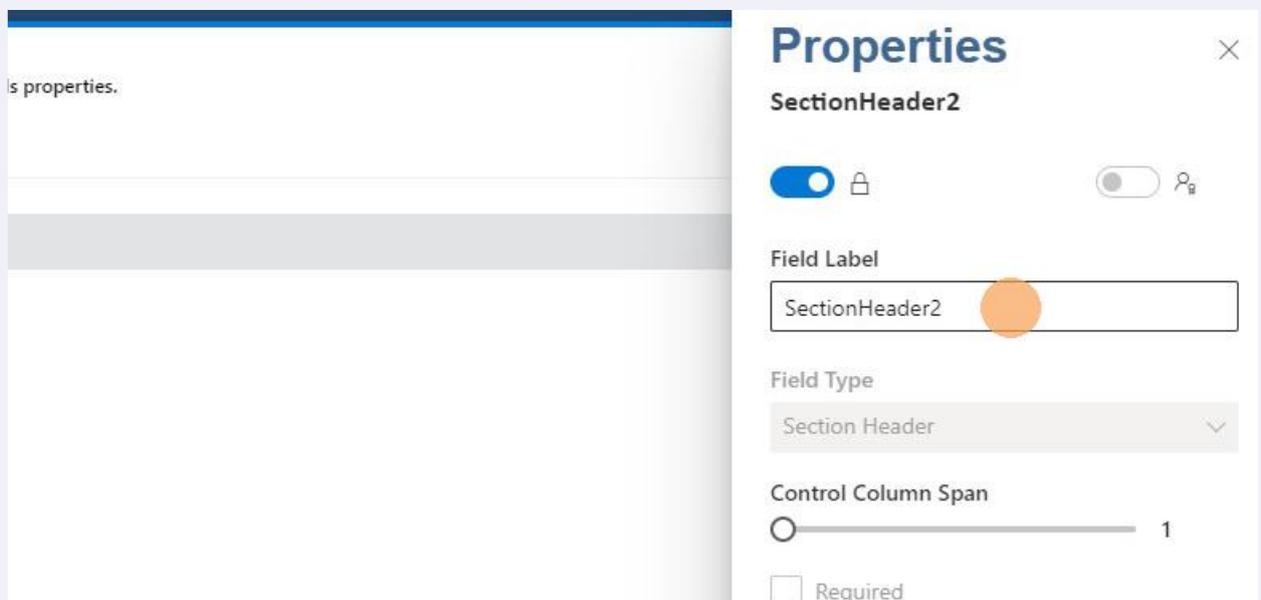
With the overall form name set up, drag and drop another 'Add Section Header' so that you can name the first section of the form. TIP 3; Think of the form from a Users perspective and make it easy for them to follow the structure and the language. Drag and drop this under the 'Mutual NDA' heading.



**10** Click on the cog.

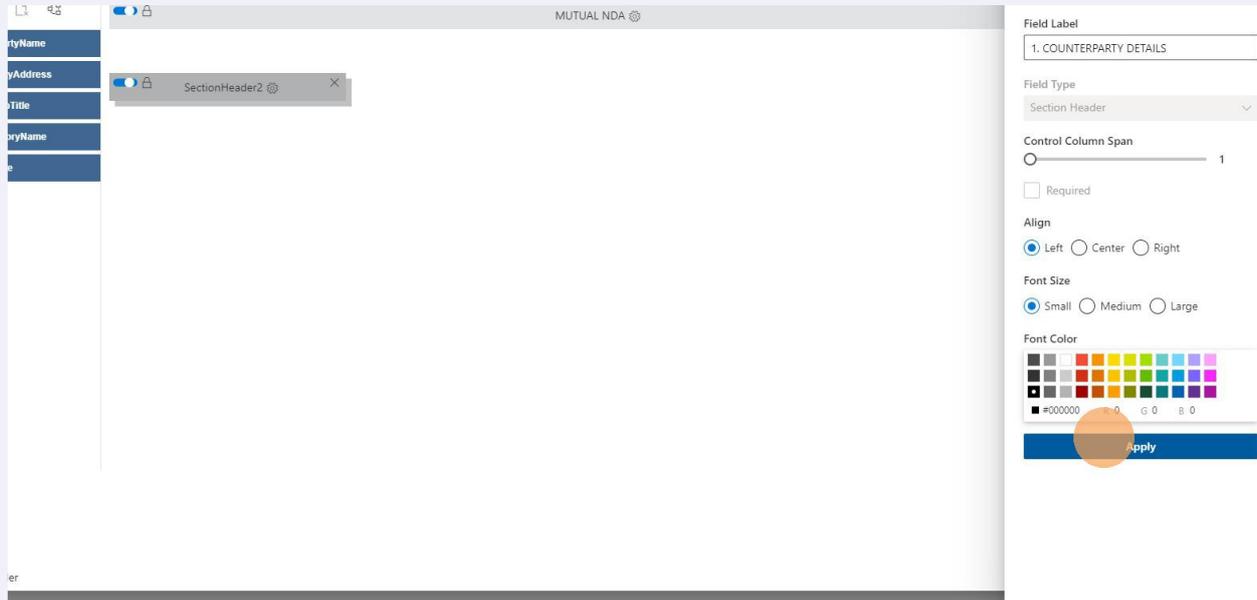


**11** Click on 'SectionHeader 2'



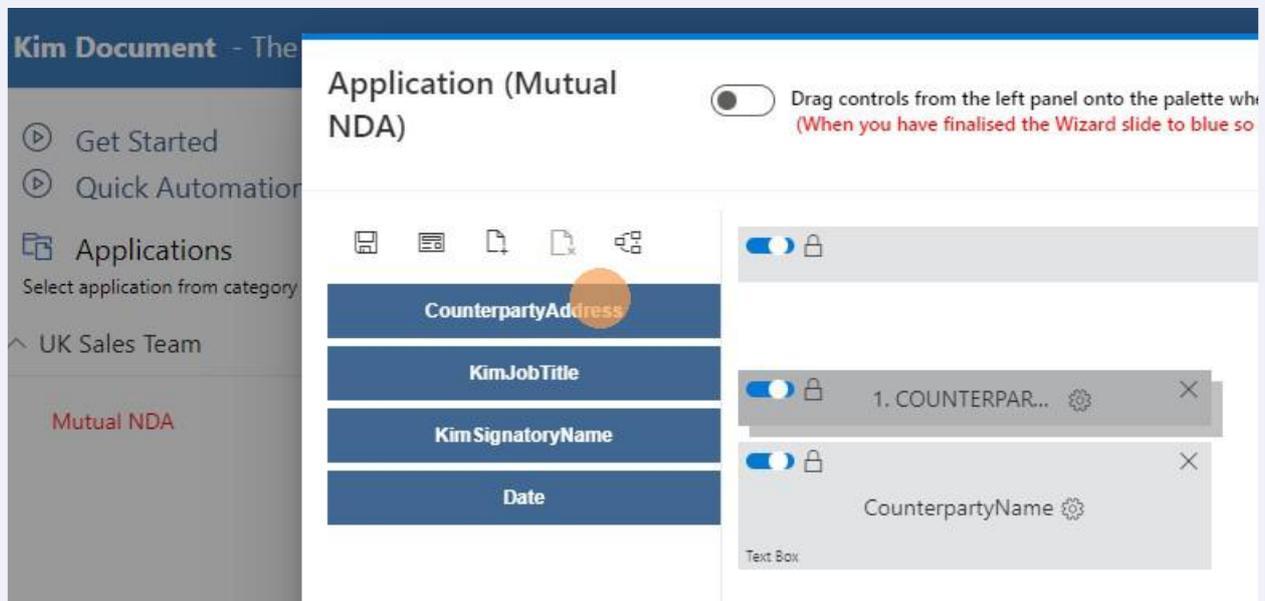
12

Add in your section header. In this example it is '1. COUNTERPARTY DETAILS'. Complete the rest of the fields ('Align' and 'Font Size') add any colour (the default is black) and 'Apply'.



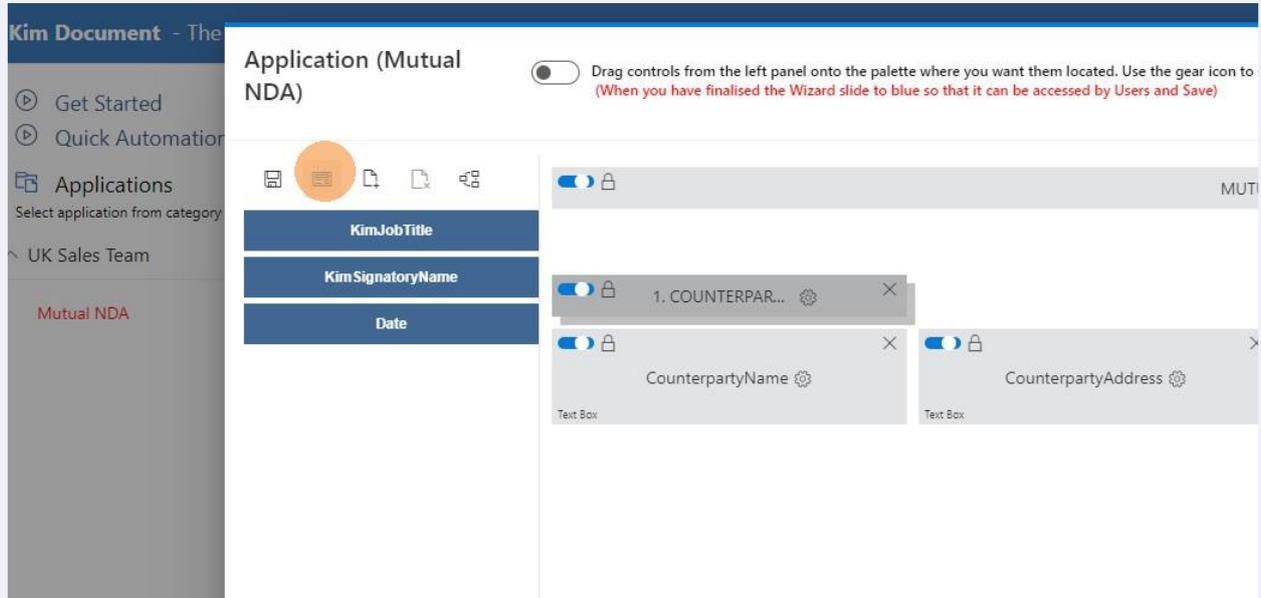
13

With the first section header in place, drag and drop the tags relevant to this section under the header in the order you want them to appear to a User.



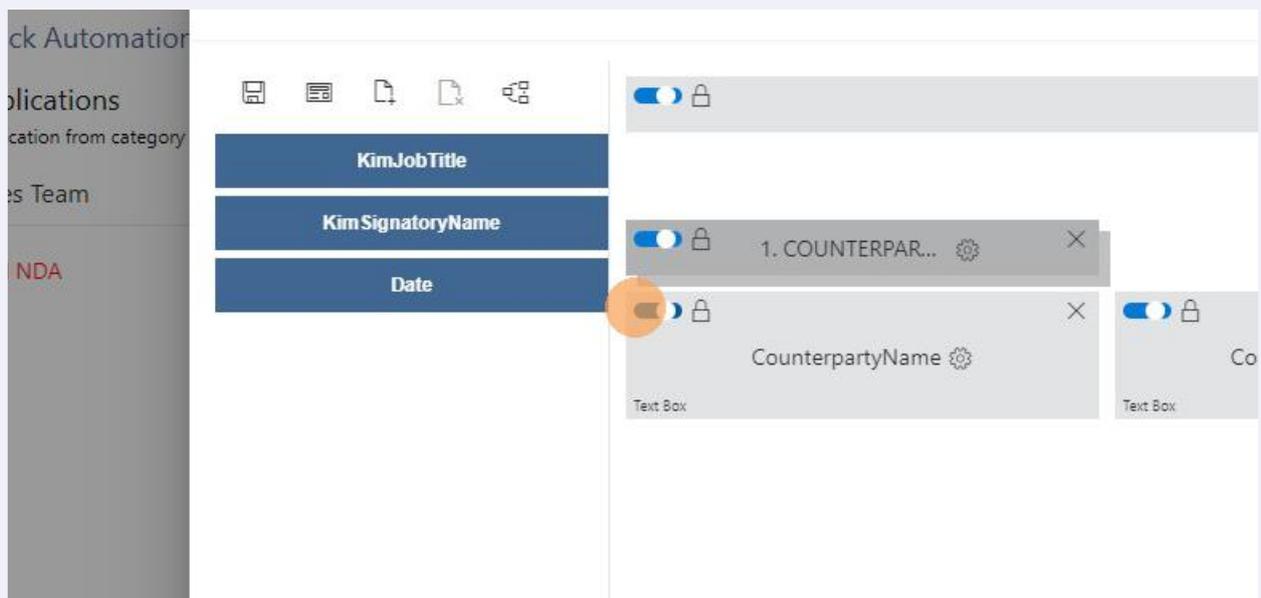
14

At any time you can click the preview button to see how the form will look to a User. TIP 4: Save your Wizard at regular intervals so that you do not accidentally lose your work.

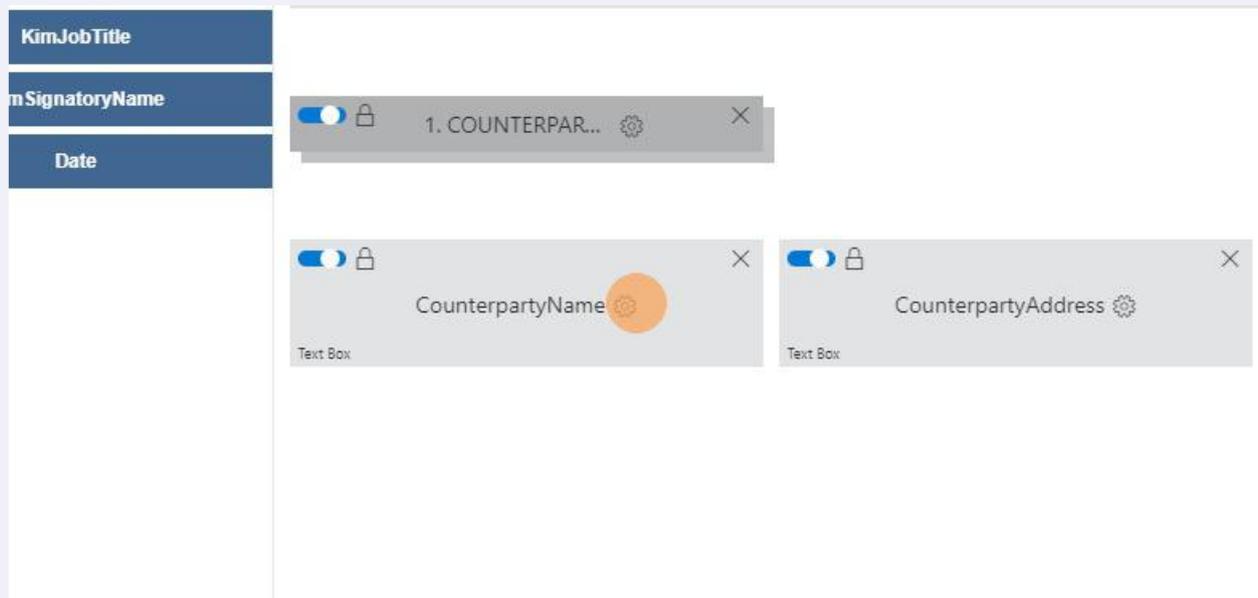


15

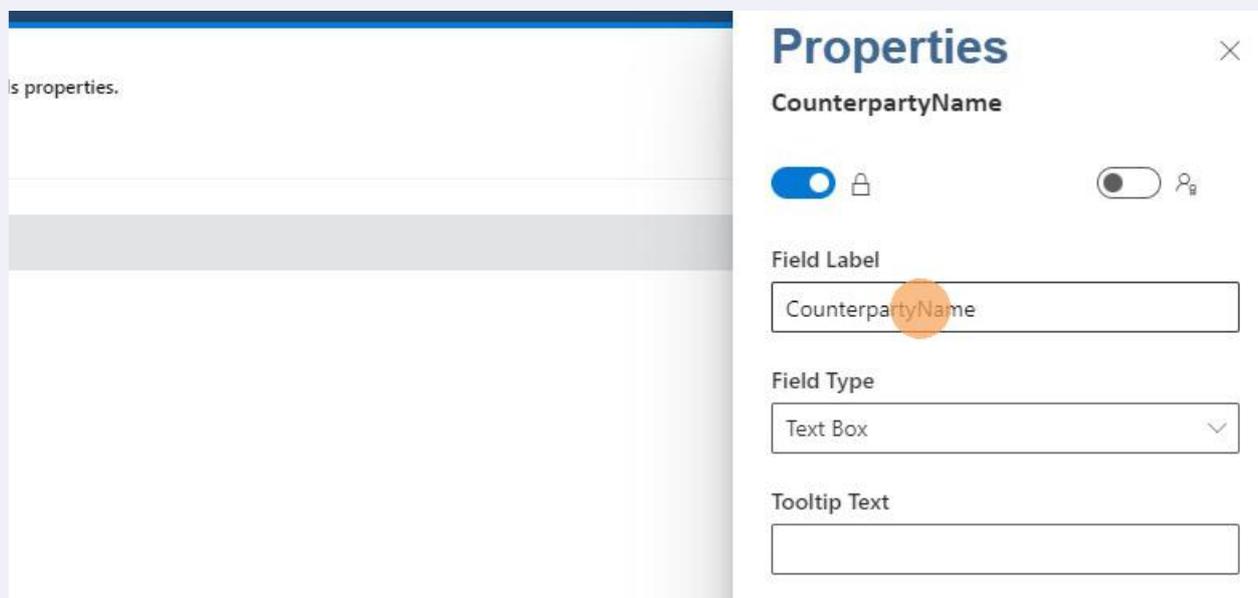
If having previewed it, you want to change the layout, simply return to the Wizard, unlock the tag(s) you want to move, drag and drop them to their new position, and re-lock. TIP 5 Always re-lock a tag when you have moved it to your preferred position. If you leave it unlocked it will move when you drag and drop other tags across it.



**16** With your tags in the right position, click on the cog.



**17** You can now add the properties for this tag. Firstly amend the 'Field Label' to what you wish the field heading to be. This should be easily understood by a potential User. You could change this to 'Add Counterparty Name' or just 'Counterparty Name'.



18

When you click on 'Field Type' you will be presented with the various options you can select. These control the information that a User can input into this field. We will explore some of these fields later in this step-by-step but for 'Counterparty Name' this is probably a 'Text Box' so that a User can write in the counterparty. It could be a 'Drop Down List' of counterparties and if you selected this you will have options further down to add the list manually or by upload.

The screenshot shows a configuration panel for a form field. At the top, there are two toggle switches: one is turned on (blue) and the other is turned off (grey). Below these is the 'Field Label' section with a text input field containing 'Counterparty Name'. The 'Field Type' section is a dropdown menu with 'Text Box' selected and highlighted in orange. Other options listed are 'Check Box', 'Currency', 'Date', and 'Drop Down List'.

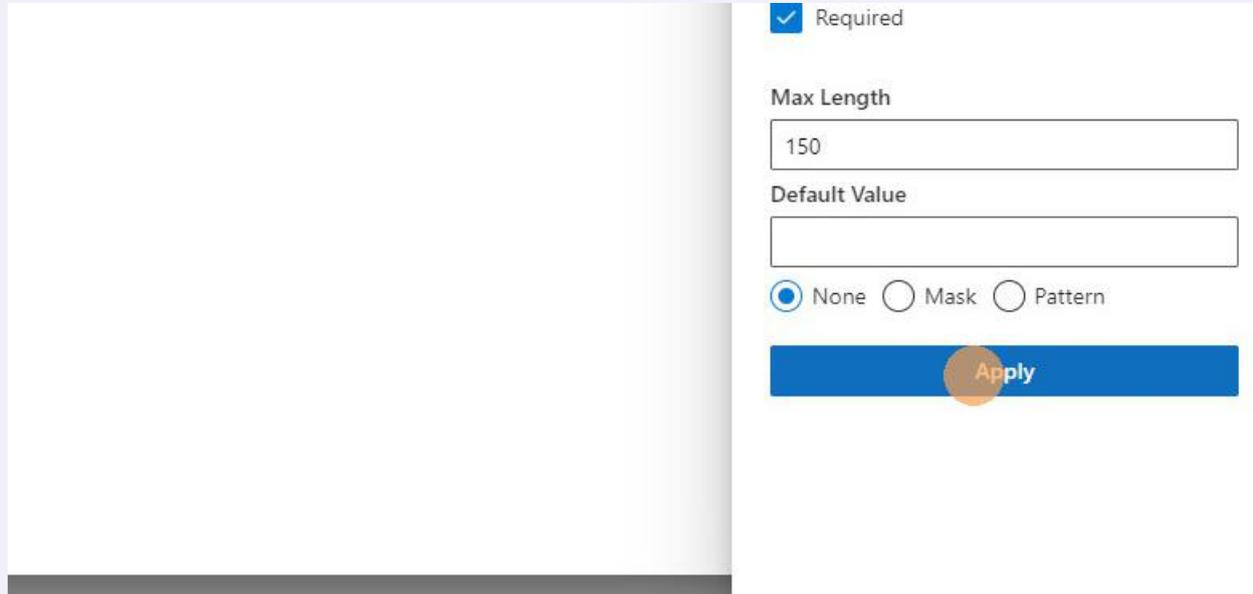
19

You can make fields in your form mandatory/required (i.e. a User has to answer this question and if they do not they cannot submit the form). To make a field mandatory simply tick the 'Required' field. TIP 6: Make sure that you only make fields mandatory / required that you know a User can answer / complete. These fields are excellent for compliance forms and surveys and intake / request forms.

The screenshot shows a configuration panel for a form field. It includes a text input field at the top. Below it are sections for 'Tooltip Url' (with an empty text input), 'Control Column Span' (a slider set to 1), and a 'Required' checkbox which is checked and highlighted in orange. Below that is the 'Max Length' section with a text input containing '150', and the 'Default Value' section with an empty text input. At the bottom, there are three radio buttons: 'None' (selected), 'Mask', and 'Pattern'.

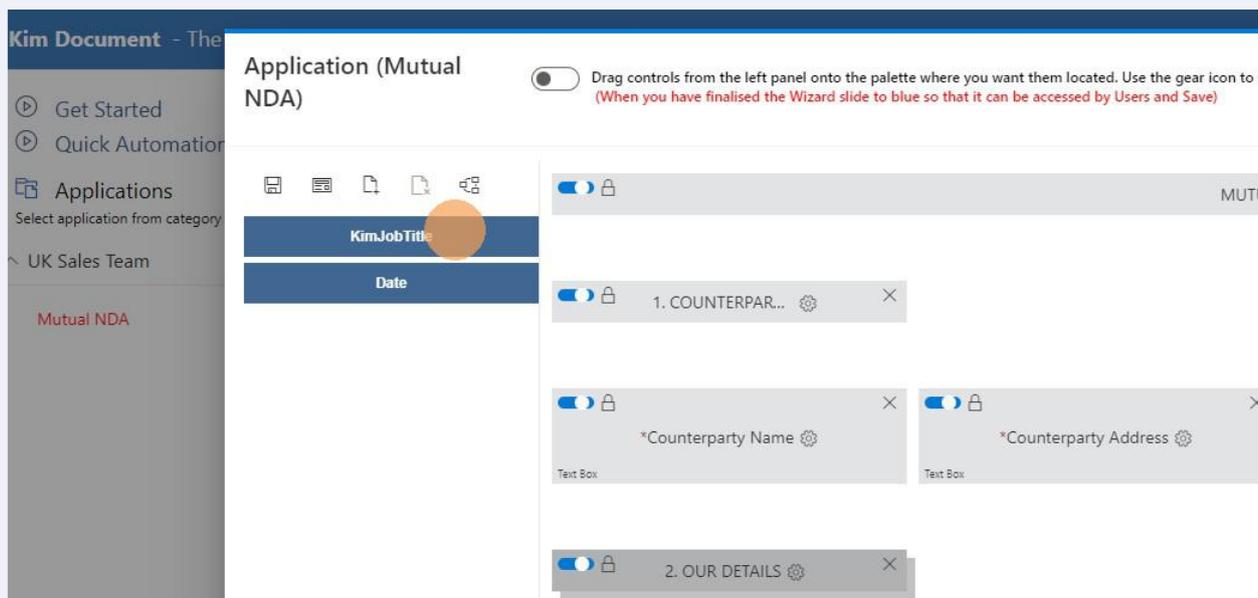
20

The 'Max Length' field allows you to control the number of characters a User can enter into a field. It is defaulted to 150 but you can make it less or more by simply changing the number. Once you have completed the dialog box select 'Apply'.



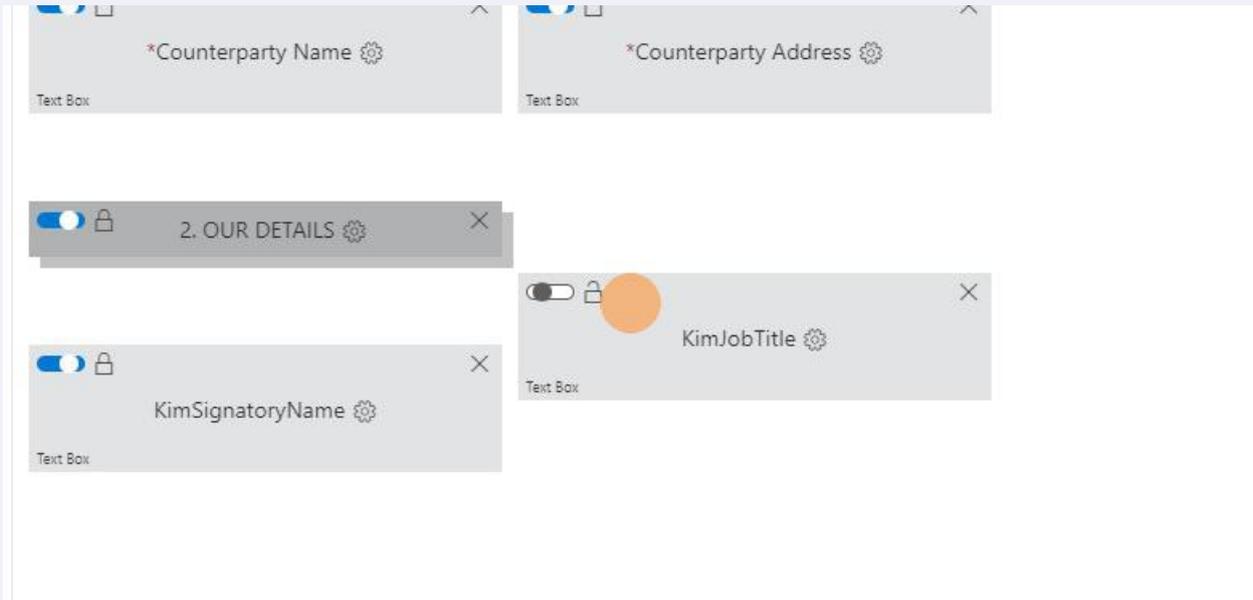
21

Having completed the Properties for the tags under section 1, drag and drop 'Add Section Header' to create a section 2 and then drag and drop the tags that sit under section 2.



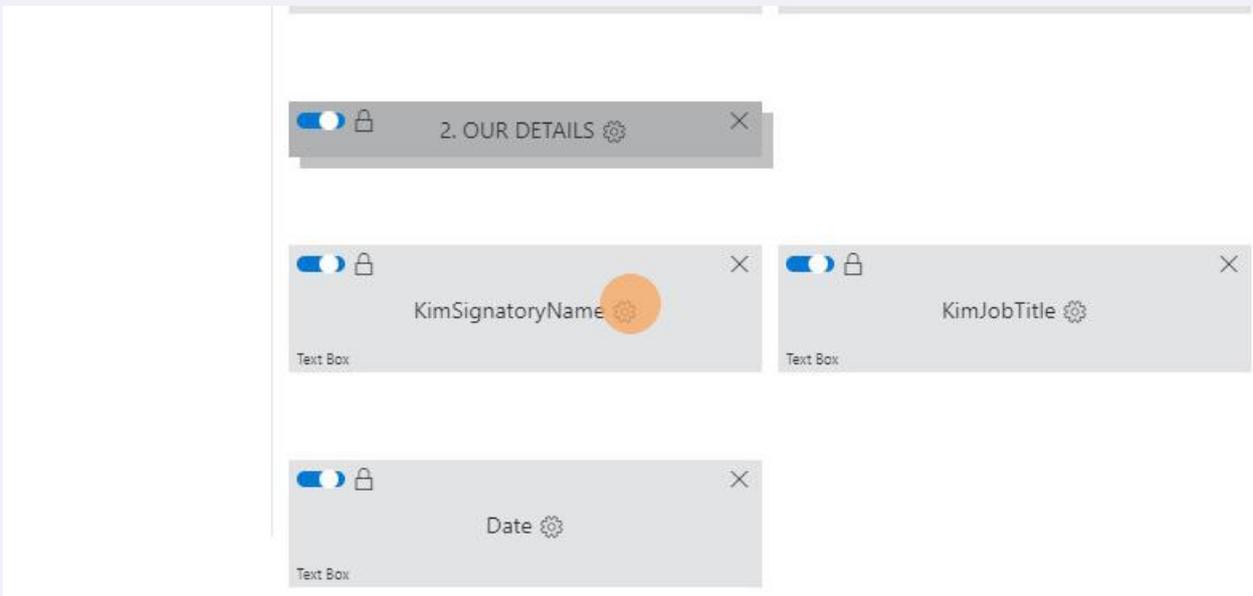
22

Remember you can preview your form layout at any time and move tags by unlocking them and then re-locking them when they are in your preferred position.



23

Select the cog on the tag you want to add properties to.



**24** Change the 'Field Label' as required and select 'Field Type'

The screenshot shows a configuration panel for a form field. On the left is a preview of the form field. On the right, the configuration options are:

- Field Label:** A text input field containing "Kim Signatory|Name".
- Field Type:** A dropdown menu currently set to "Text Box". An orange circle highlights the dropdown arrow.
- Tooltip Text:** An empty text input field.
- Tooltip Url:** An empty text input field.

**25** For this example select 'Drop Down List'.

The screenshot shows the 'Field Type' dropdown menu expanded. The options listed are:

- Text Box
- Check Box
- Currency
- Date
- Drop Down List (highlighted with an orange circle)
- Drop Down (Multiple selection)
- Integer
- Rich Text Editor
- Text Area
- Text Box

**26** Make the field 'Required' if you want to.

The screenshot shows a configuration panel for a field. It includes a text input field at the top, followed by a 'Tooltip Url' field. Below that is a 'Control Column Span' slider set to 1. The 'Required' checkbox is checked and highlighted with an orange circle. The 'Static List' checkbox is also checked. Below these is a text area for 'Item list(separate each item with a comma):' which is currently empty. At the bottom, there is a 'My Lists' dropdown menu.

**27** In the 'Item List' write in your drop down options. These are the options that a User will be able to select from. TIP 7: When typing in a drop down list type your items and only separate them by a comma (no spaces). For example - Red,Amber,Black Or Yes,No,Don't Know When you have written in your list select 'Apply'.

The screenshot shows the same configuration panel as in step 26. The 'Required' and 'Static List' checkboxes are checked. The 'Item list(separate each item with a comma):' text area now contains the text 'Person A,Person B,Person C'. Below this is a 'My Lists' dropdown menu. At the bottom, there is a blue 'Apply' button, which is highlighted with an orange circle.

28

For long drop down lists, rather than type in the list you can upload it using the 'My Lists' feature. Simply untick 'Static List' and the 'My Lists' feature enables and you can use the xls icon to the right to upload a list.

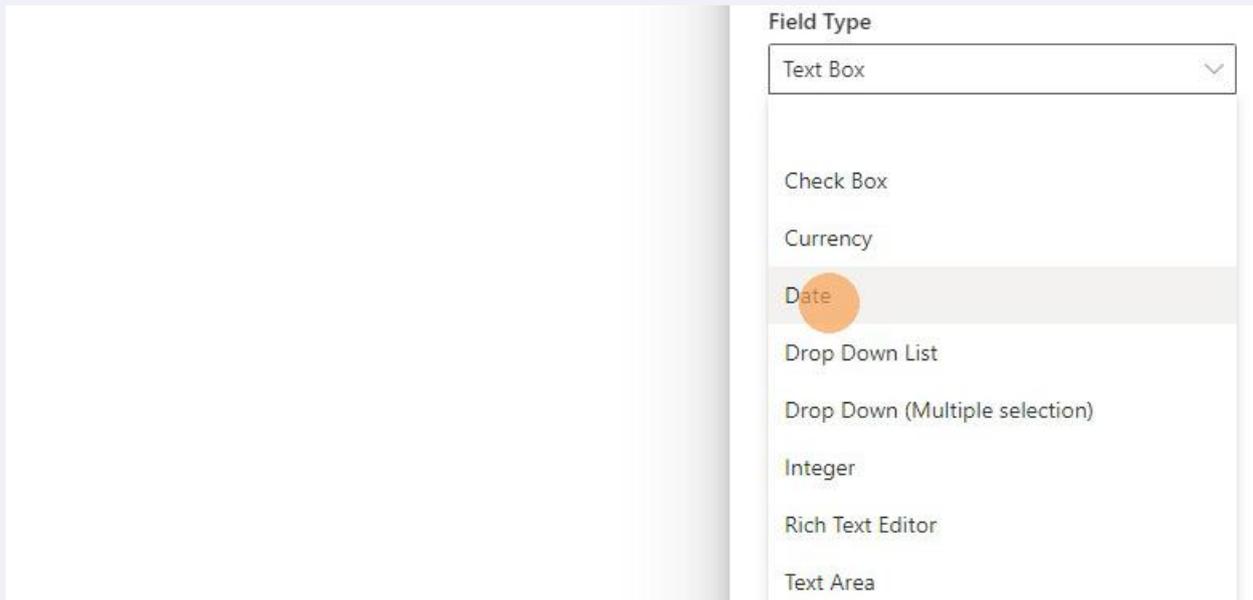
The screenshot shows a configuration panel for a dropdown list. On the left is a large empty white area representing the list. On the right, the configuration options are: 'Control Column Span' with a slider set to 1; 'Required' checked; 'Static List' checked; and 'Item list(separate each item with a comma):' with an empty text box. Below this is a 'My Lists' dropdown menu with a list icon to its right. At the bottom is a blue 'Apply' button.

29

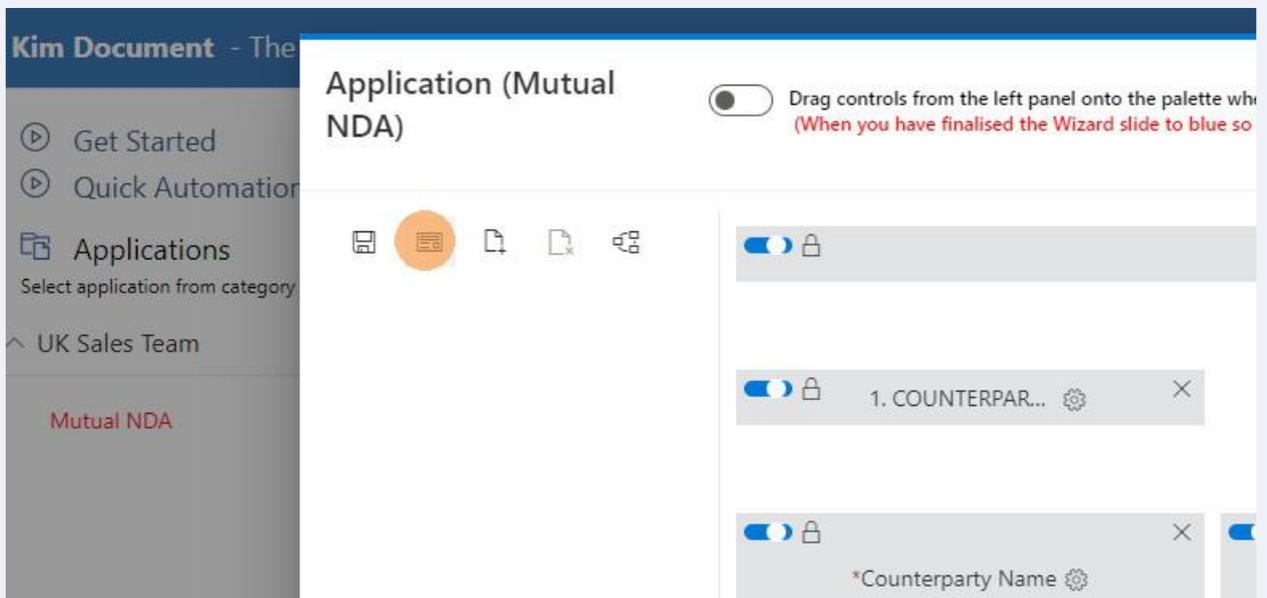
To apply dates simply select the cog in the relevant tag.

The screenshot shows a form editor interface with three tags. The top two tags are 'Drop Down List' tags: '\*Kim Signatory Name' and '\*Kim Job Title'. The bottom tag is a 'Text Box' tag labeled 'Date'. Each tag has a toggle switch, a lock icon, and a close icon. The 'Date' tag has a gear icon highlighted with an orange circle. On the left side of the editor, there are options: 'Add Line Break', 'Add Paragraph', and 'Add Section Header'.

**30** Select 'Date' from the 'field Type' menu and it will automatically apply.



**31** When you have added properties to all your tags preview the layout that a User will see be selecting the preview icon.



32

Check that you are happy with the layout and that your drop down fields have pulled through. Amend the layout by using the Wizard if you want to.

2. OUR DETAILS

Kim Signatory Name\*  
Select a value

- Person A
- Person B
- Person C

Kim Job Title\*  
Select a value

Please select a value

33

Exit preview and save the form. Note that in the left-hand greyed out menu the 'Mutual NDA' is in red (it is red because it has not been enabled for Use yet).

Kim Document - The

Application (Mutual NDA)

Drag controls from the left panel onto the palette when you have finalised the Wizard slide to blue so

Get Started

Quick Automation

Applications  
Select application from category

UK Sales Team

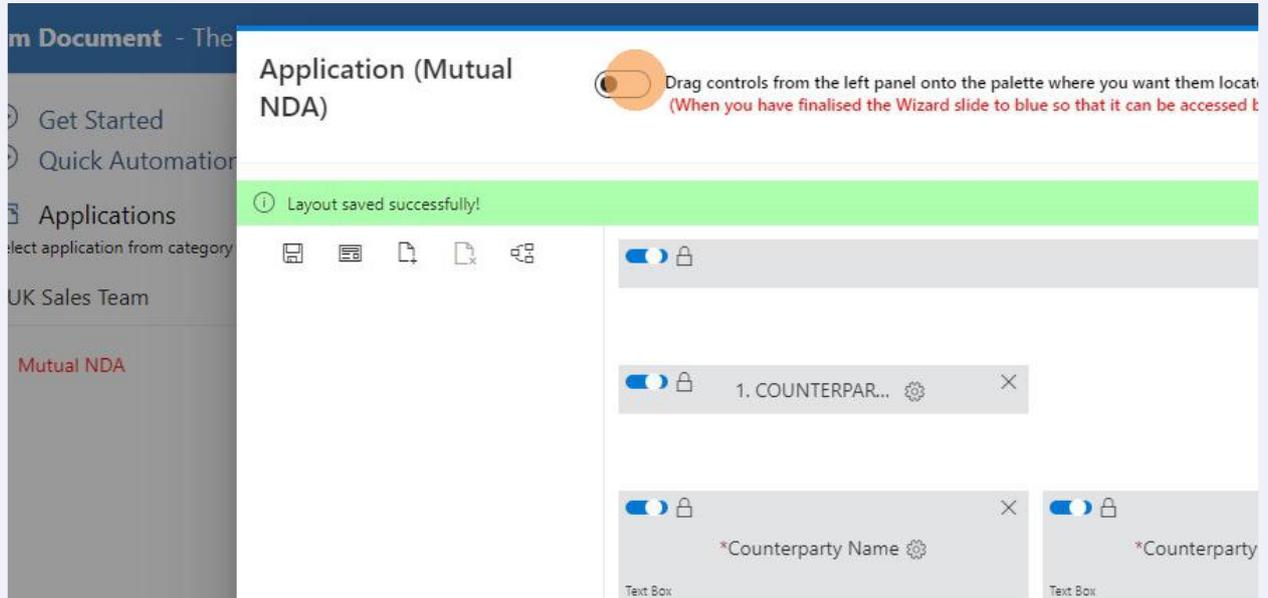
Mutual NDA

1. COUNTERPAR...

\*Counterparty Name

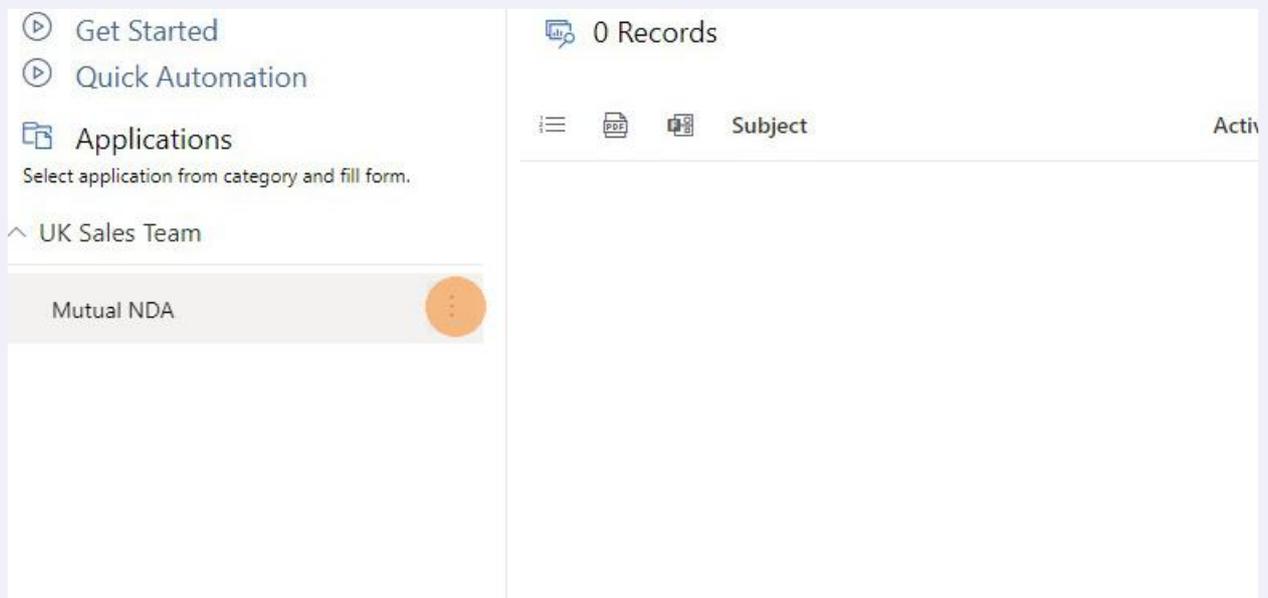
34

Having saved the form, turn the lock at the top of the screen to blue and save again. This will enable the Application form (see next screen where the red has turned to black)



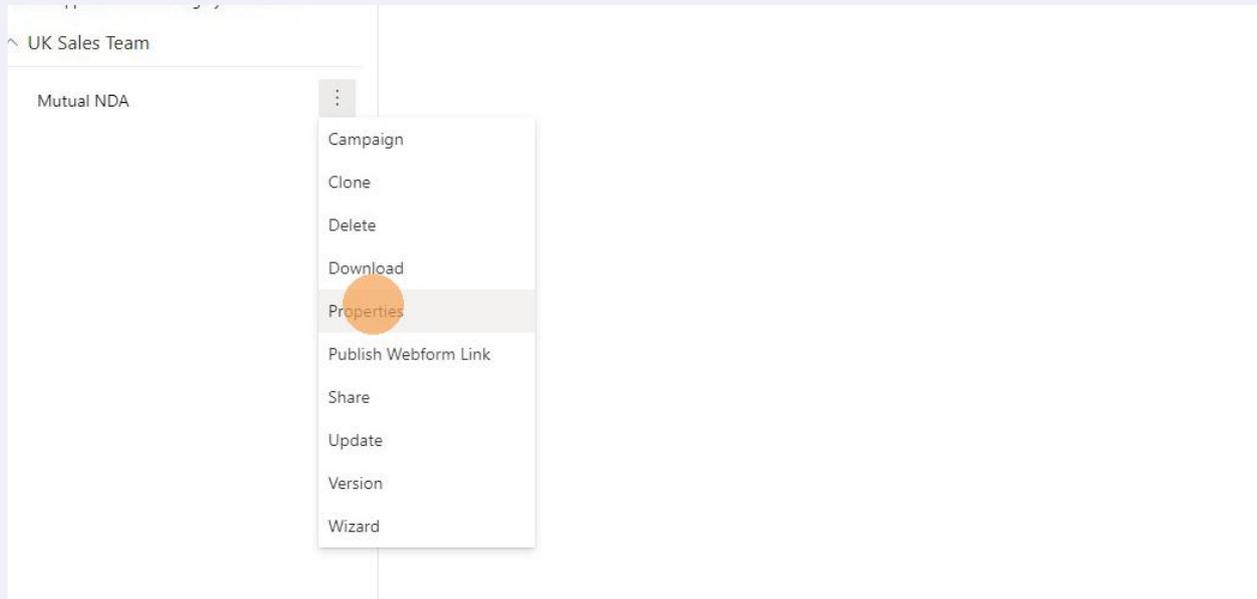
35

There is one final step to take before Users can start generating this document. Click on the three dots.



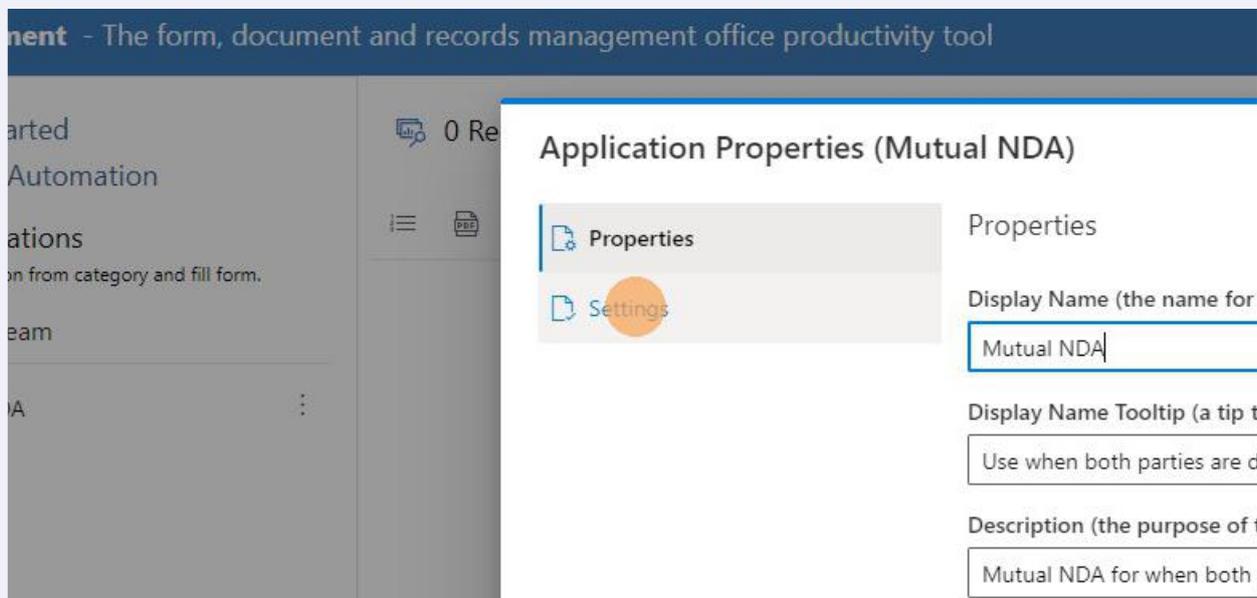
36

This provides you with your ability to take different actions from Campaigns (see 'How To Set Up and Run Campaigns') through "Publish Webform Link' (see 'How To Make a Form Available In Your Existing Systems For Users To Complete') to re-opening the Wizard to make amendments. For now select 'Properties'.



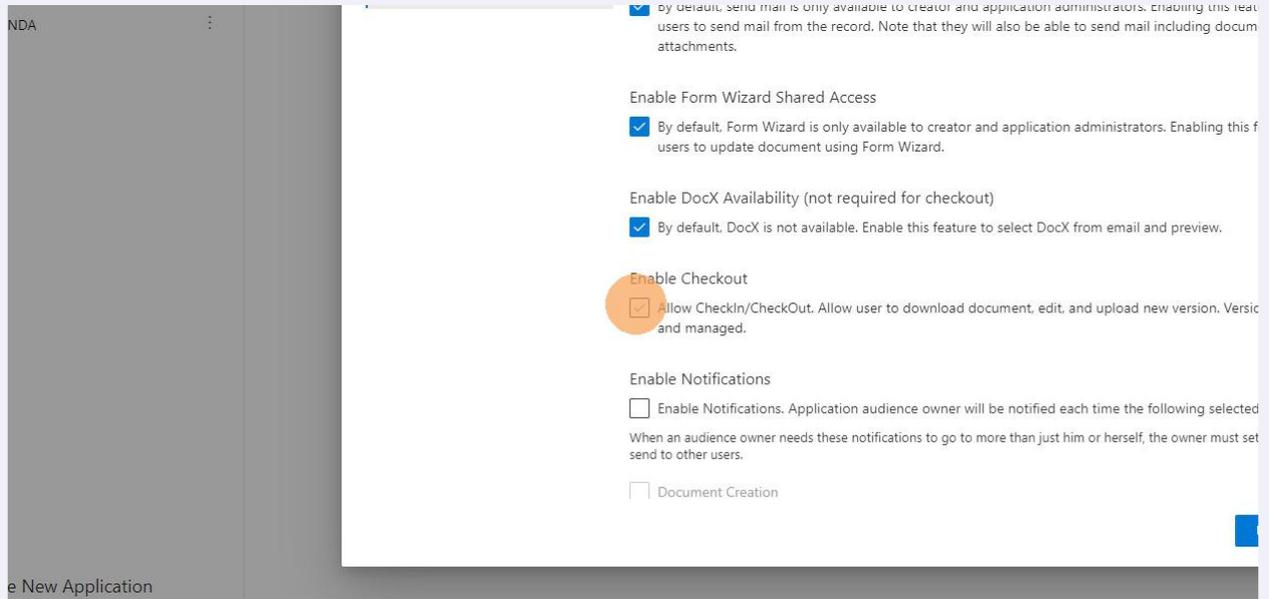
37

This allows you to add your existing properties but also enables various settings. Select 'Settings'



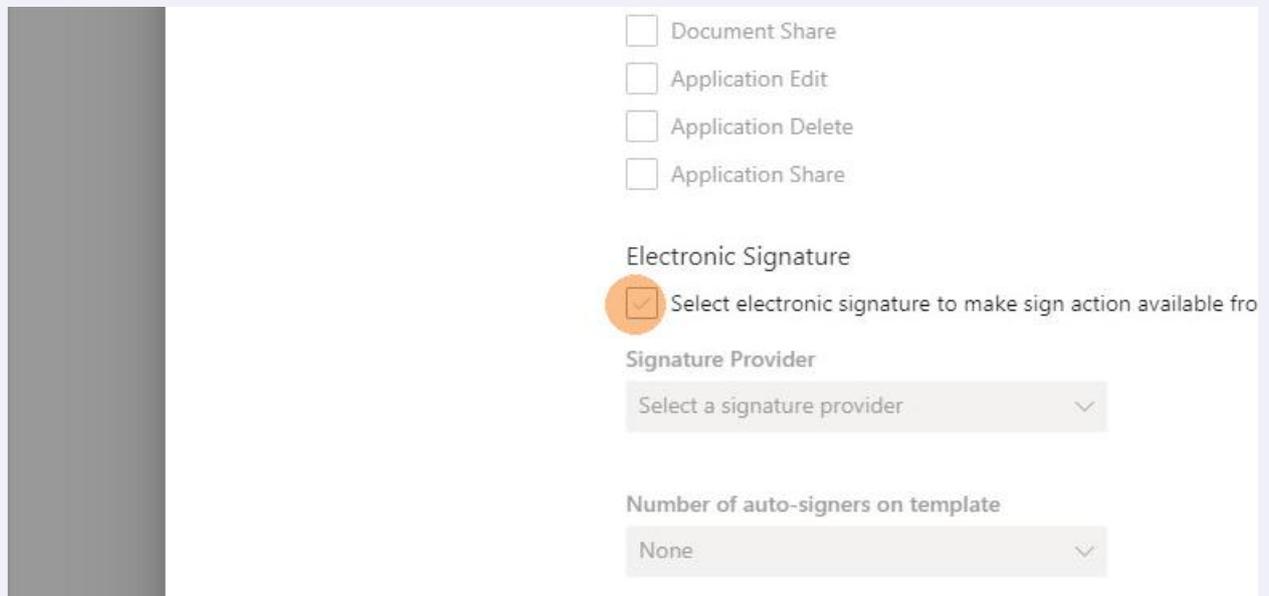
38

The various settings are self-explanatory. Tick the boxes that you want for this document. This will, for example, allow Users to send this document as email, or Share the document with a colleague or third party, have a Word and/or pdf version of the document, check-out and amend a document ...

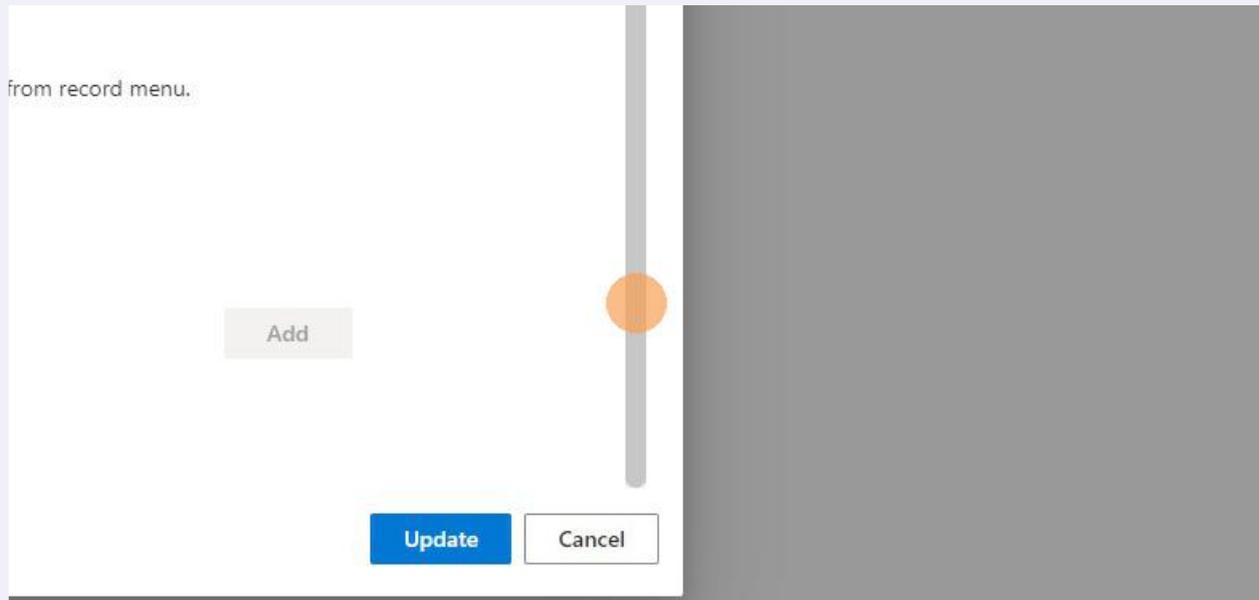


39

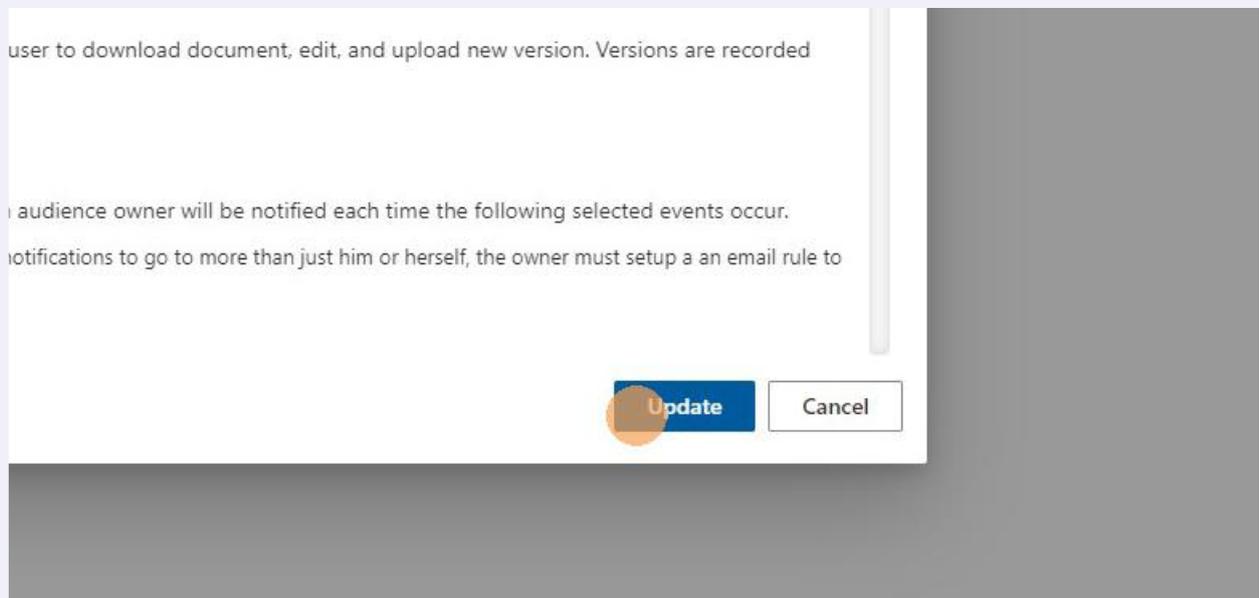
If appropriate you can also enable eSignature



**40** Click here.



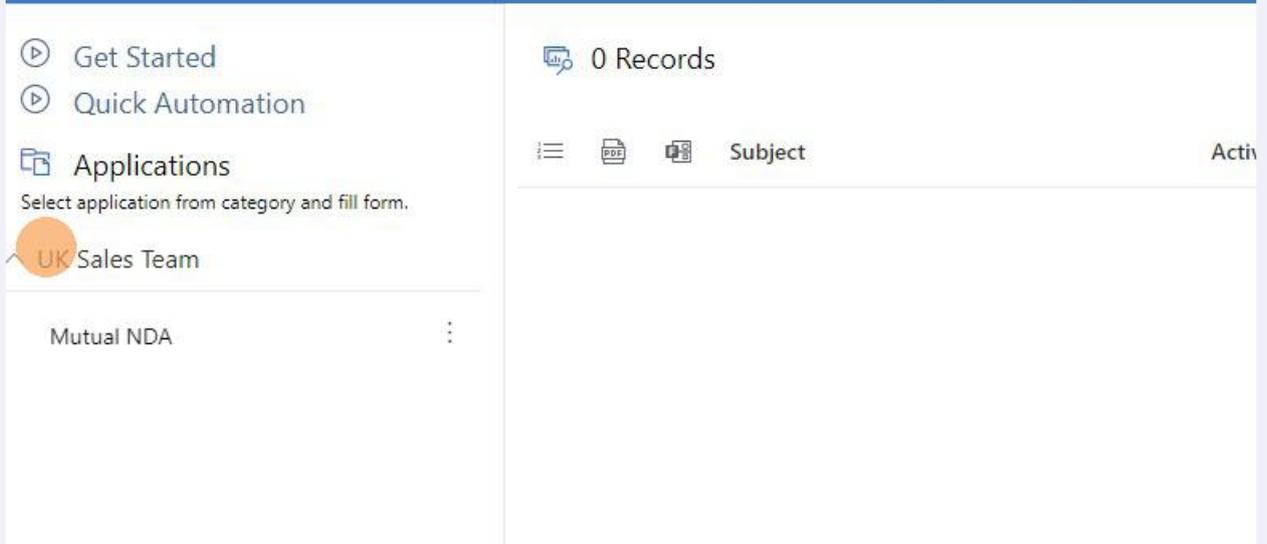
**41** When finished, 'Update' your settings for this document.



42

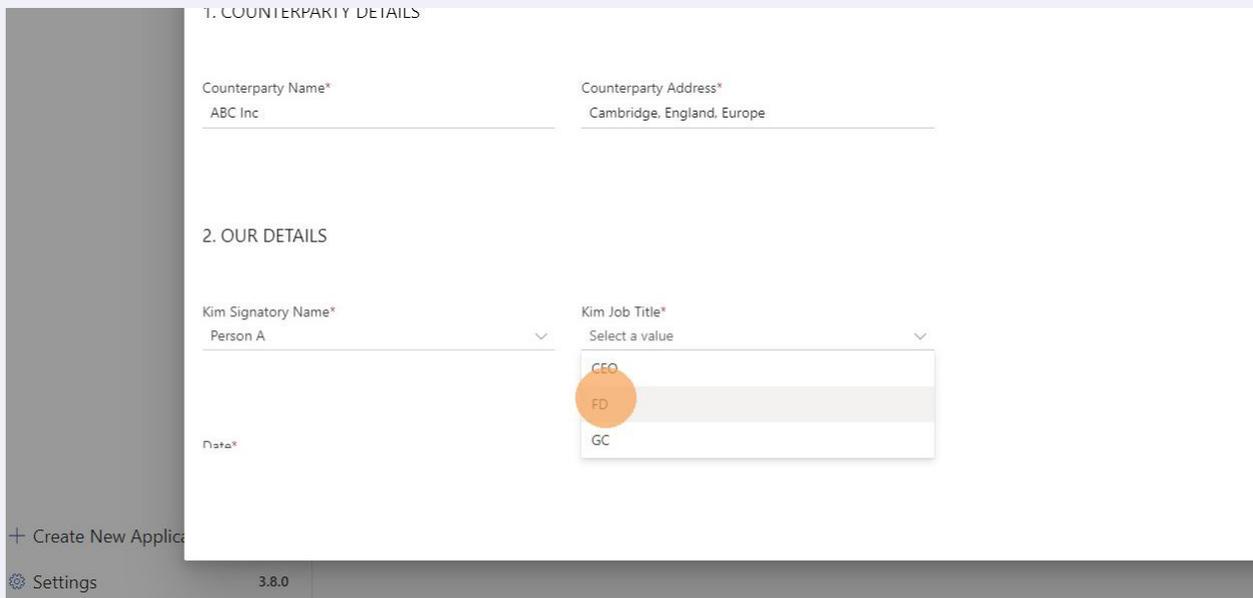
Now, when a member of the 'UK Sales Team' accesses Kim they will be able to select 'Mutual NDA' from the left-hand menu.

**Kim Document** - The form, document and records management office productivity tool



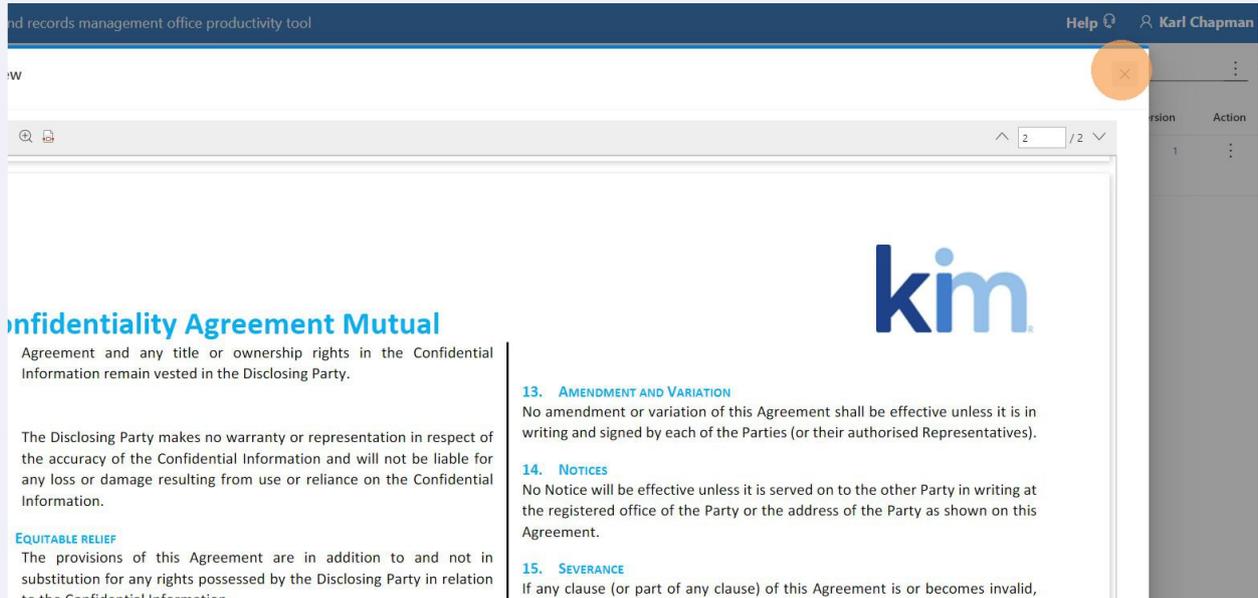
43

When they select 'Mutual NDA' the form will appear for them to complete and 'Submit'



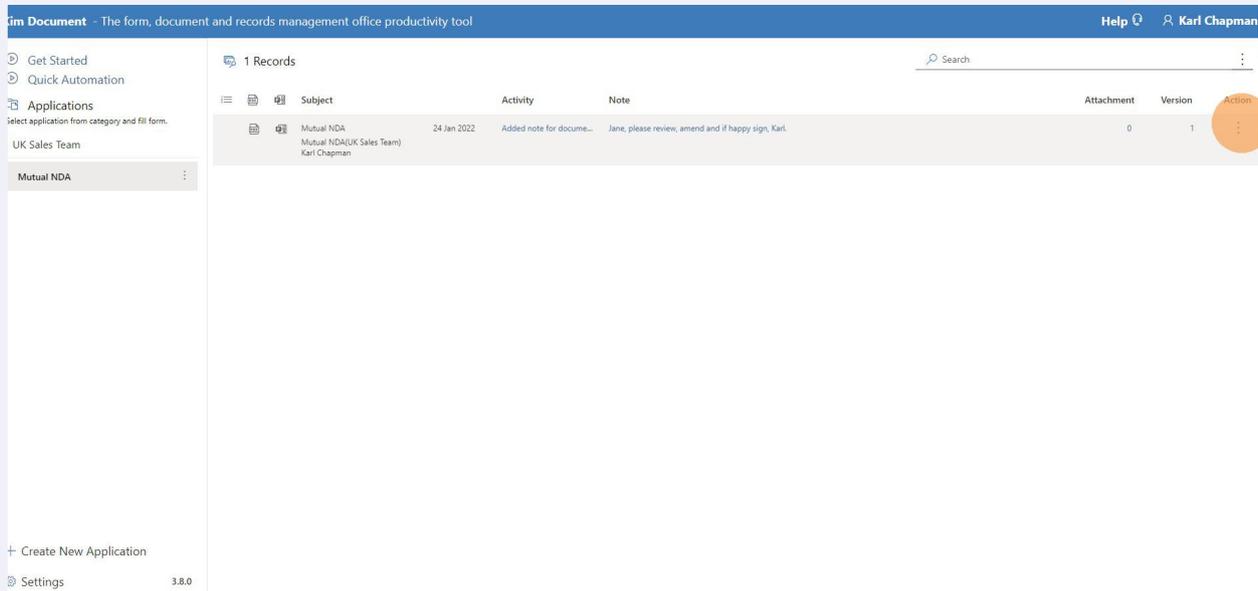
44

When they Submit the Mutual NDA will be generated with the information that has been entered.



45

Having created the document it appears as a new record in the Workspace. A User can add notes and then has several options when they select the three dots under 'Actions'.



46

The options displayed in this menu vary depending upon the Settings you enabled. In this example I have extensive options to 'Send', 'Share', 'Send Webform Update Link', add 'Attachments' ... all explained in other step-by-step guides. Congratulations, you have automated your document and it can now be used by colleagues and with third parties!

