Turning your documents into Web Applications in minutes

June 2022

Available from your browser or MS Teams

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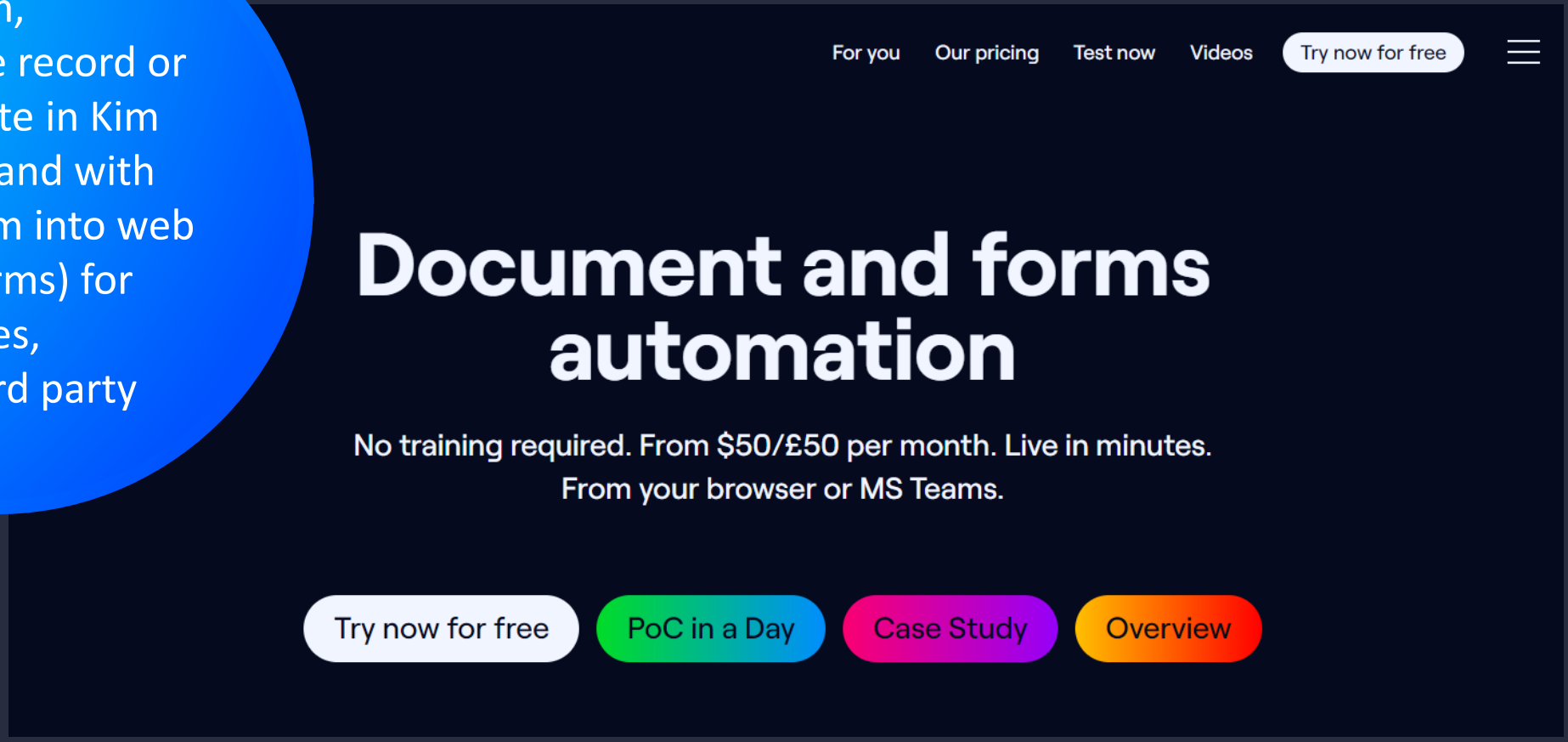
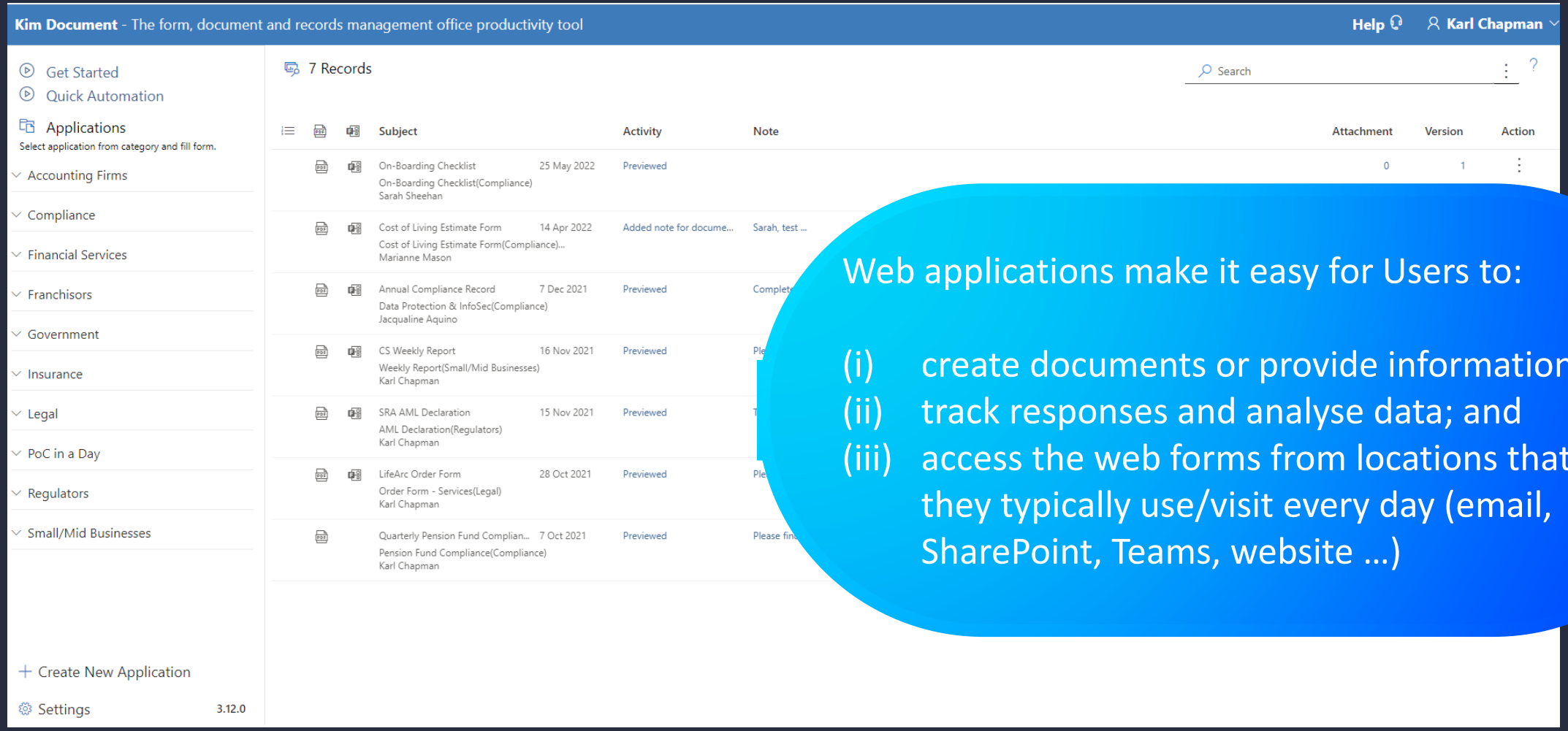
Web applications in minutes

Whatever letter, form, checklist, compliance record or contract you automate in Kim you can, in minutes, and with no training, turn them into web applications (web forms) for easy use by colleagues, customers or any third party



Web applications in minutes



Web applications make it easy for Users to:

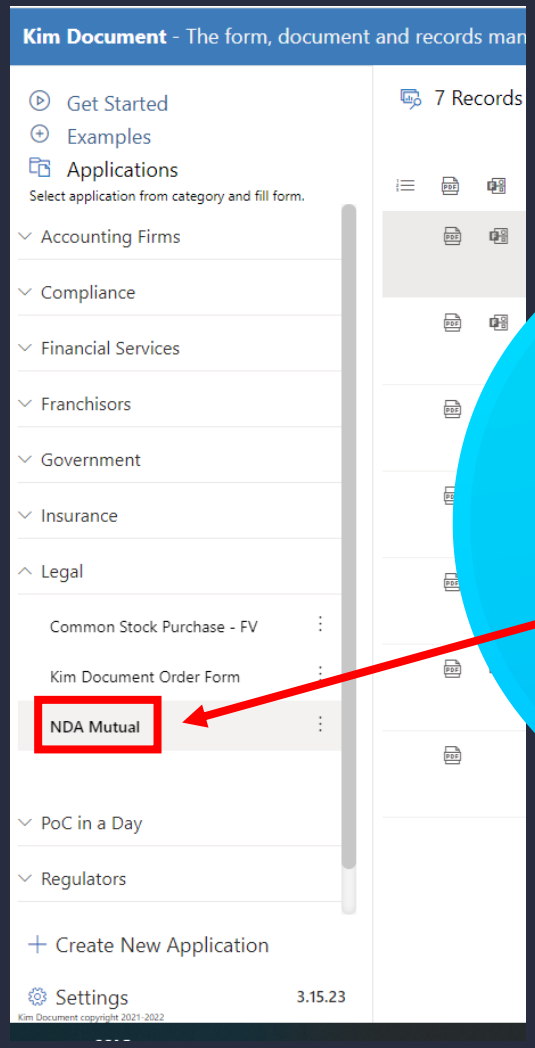
(i) create documents or provide information; or
(ii) track responses and analyse data; and
(iii) access the web forms from locations that they typically use/visit every day (email, SharePoint, Teams, website …)

Making User lives easier

Having used Kim to automate your documents you can make web applications in four ways:

1. sharing the document enabling editing and version control;
2. sending a web link so that a recipient simply completes the form and submits it;
3. creating a campaign which can be sent to up to 2000 recipients at the same time; and
4. creating a webform link (URL) that can be embedded on your internal systems or publicly facing websites for Users to access and complete.

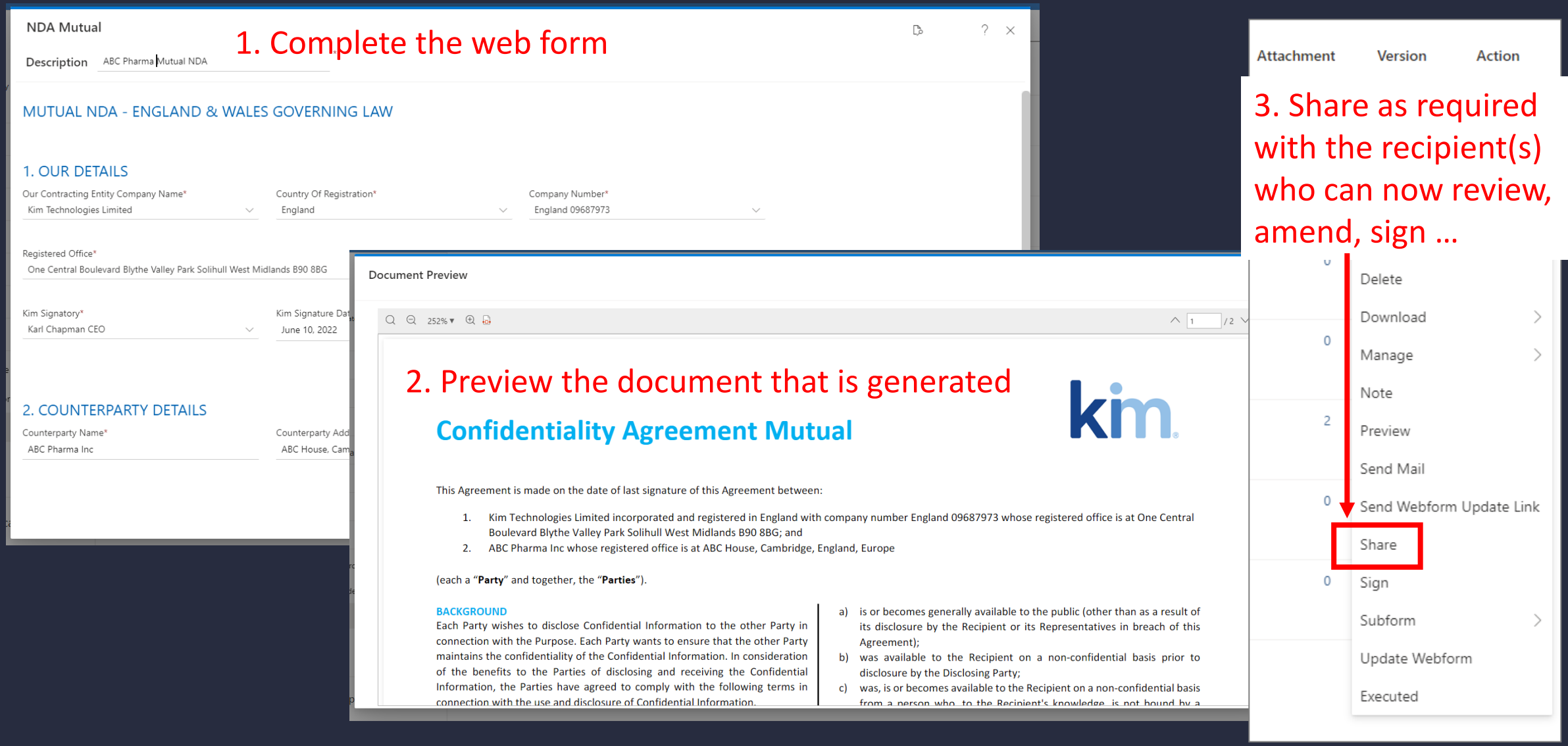
Web applications - Share



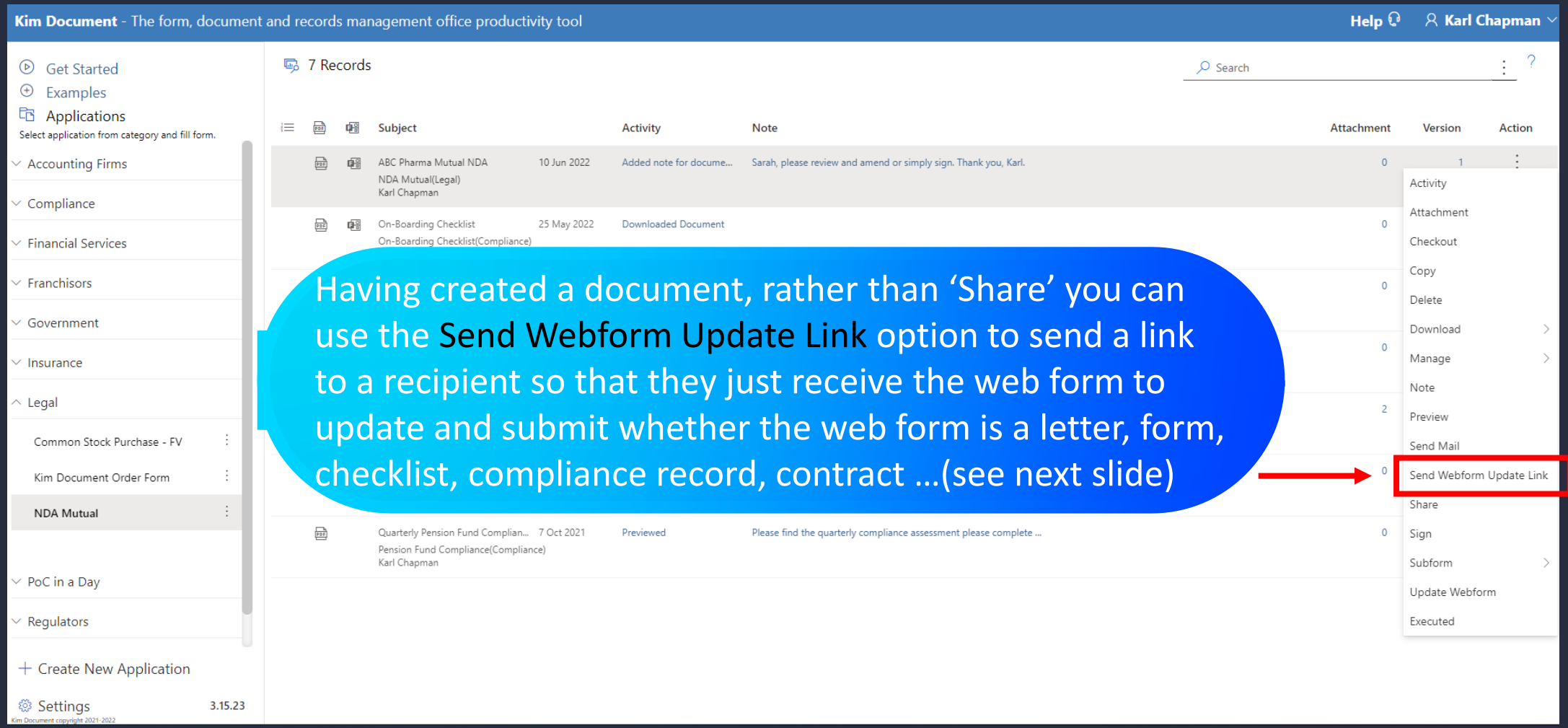
In my organization I have been given access to some letters, forms, checklists, compliance records, contracts (NOTE: you control User rights and access through enabling documents by Category and Audience).

I select 'NDA Mutual' from my list of options in my left hand menu. The web form appears and in three steps I am ready to Share internally or externally (see next slide) …

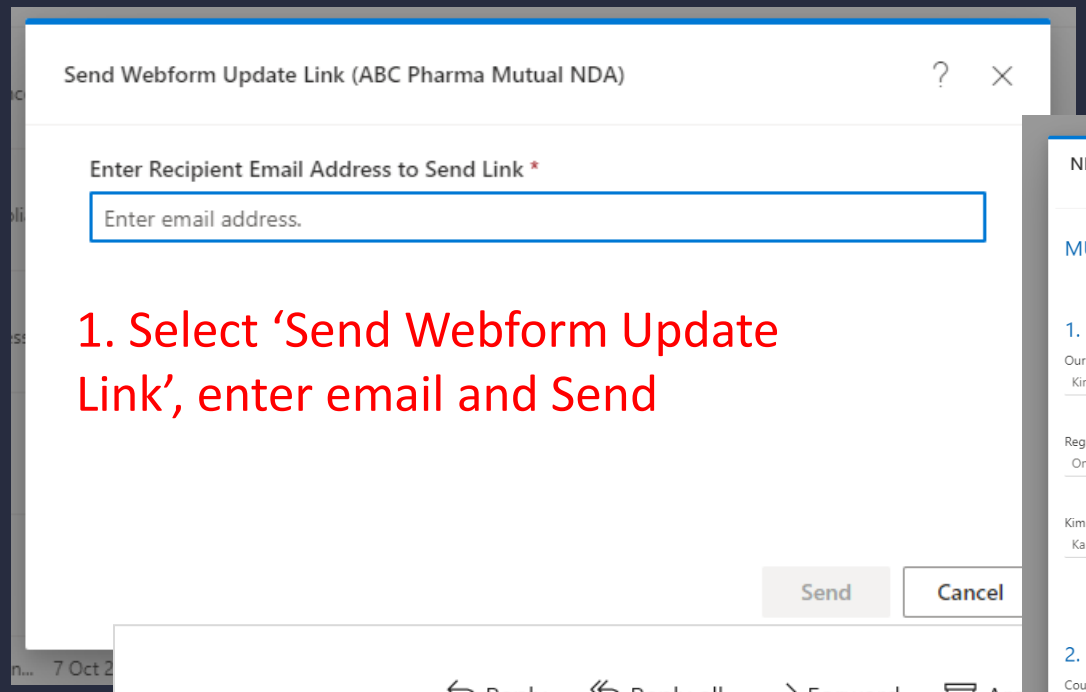
Web applications - Share



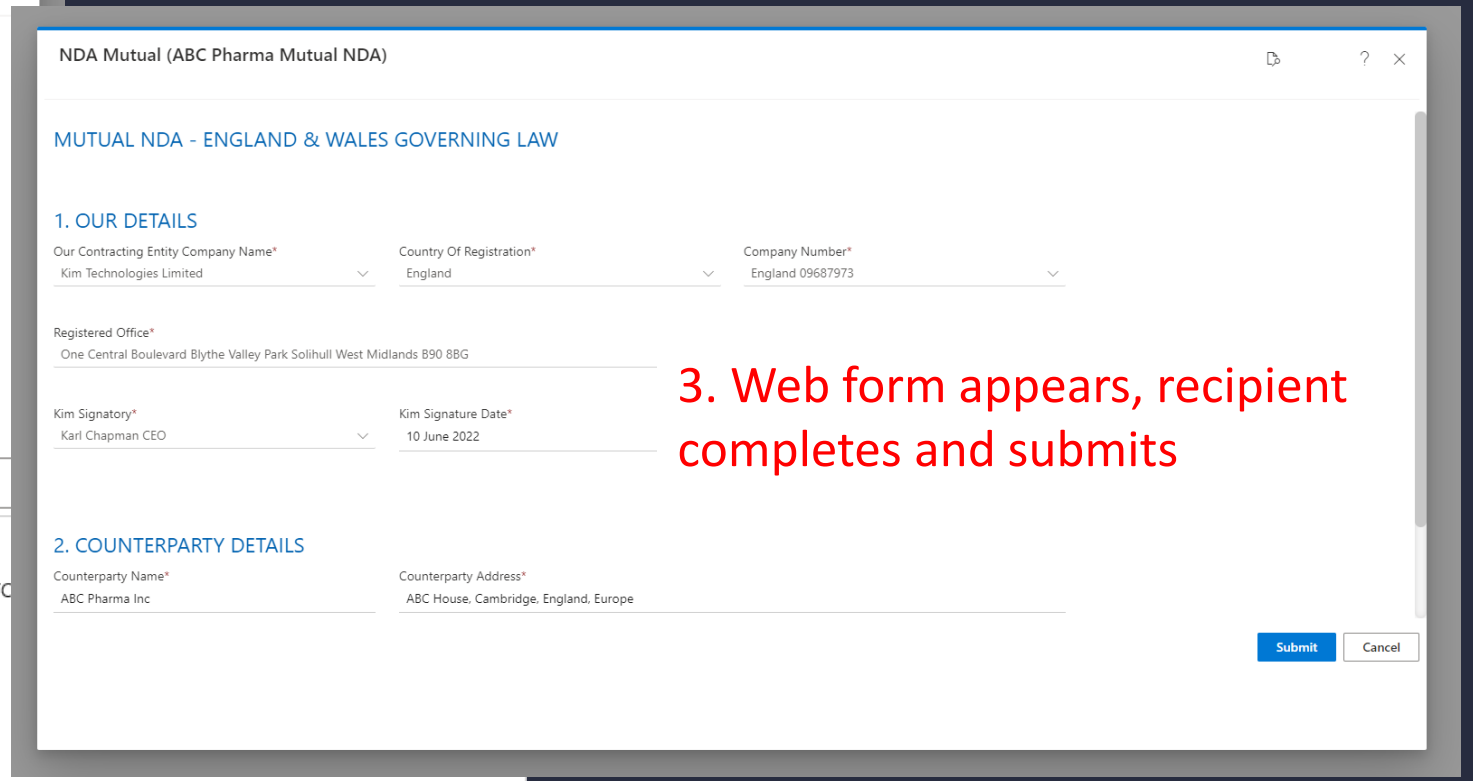
Web applications - Sending a web link



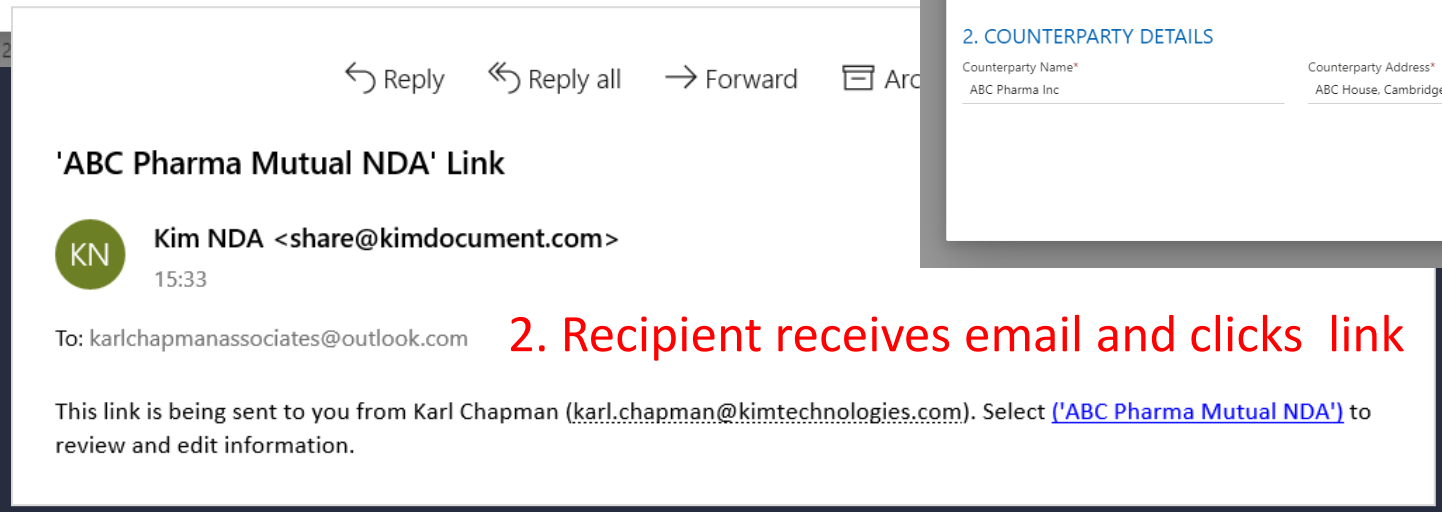
Web applications - Sending a web link



1. Select ‘Send Webform Update Link’, enter email and Send

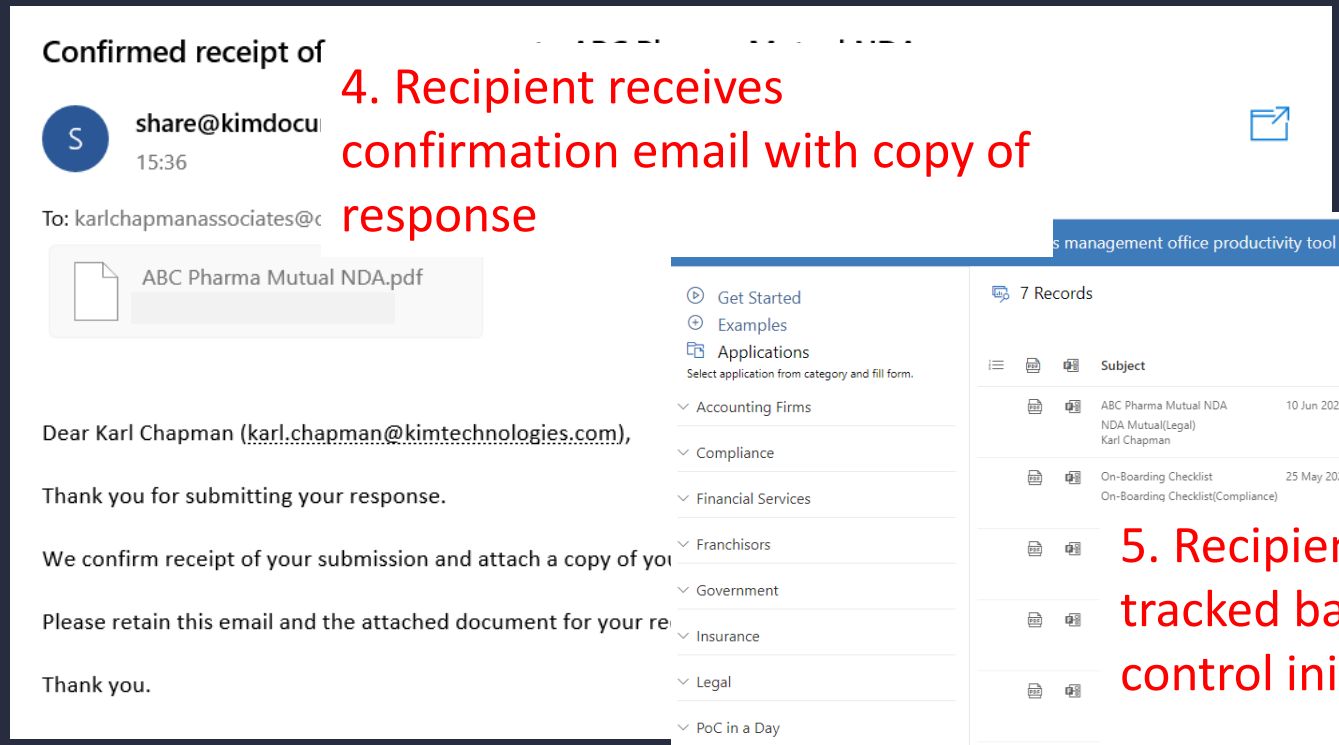


3. Web form appears, recipient completes and submits

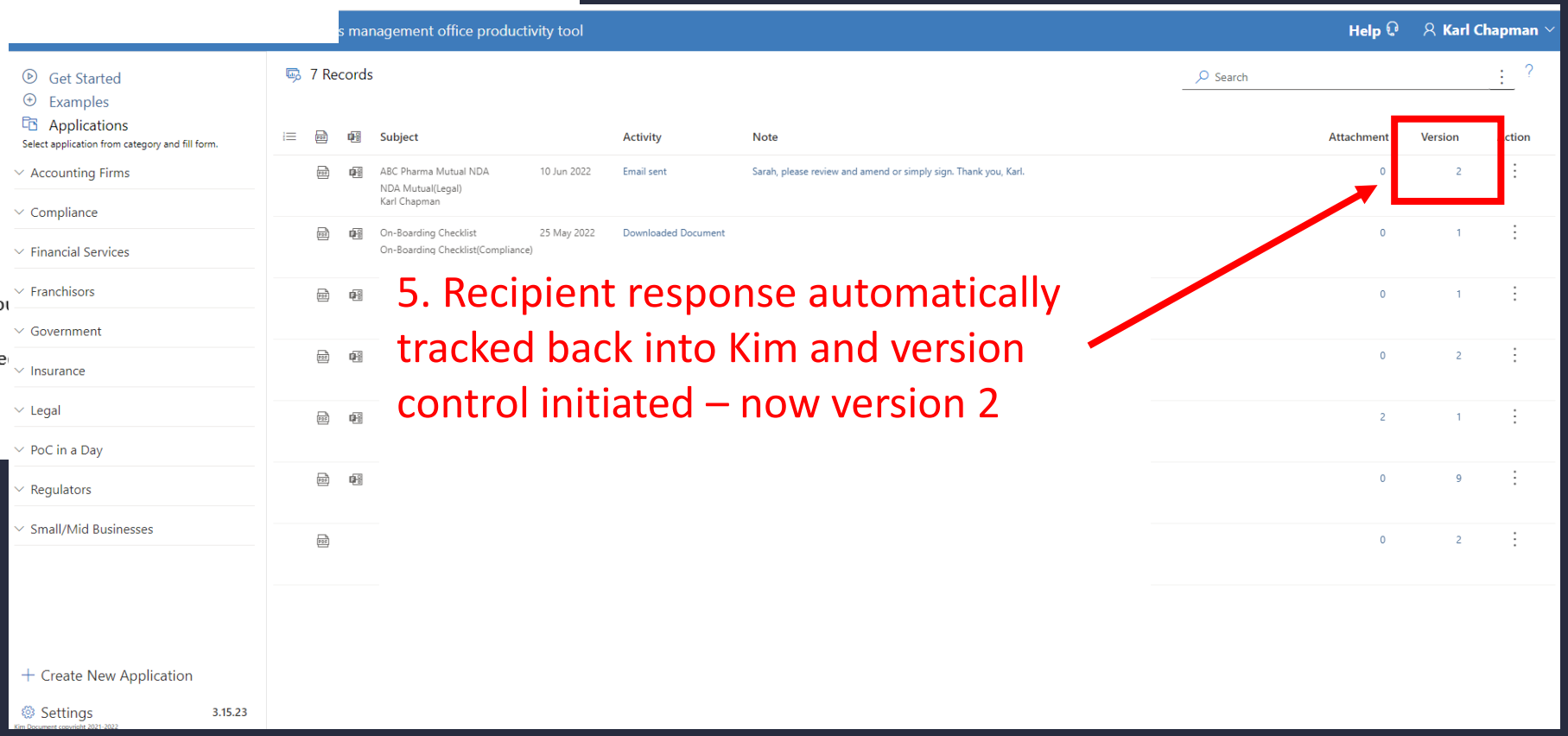


2. Recipient receives email and clicks link

Web applications - Sending a web link



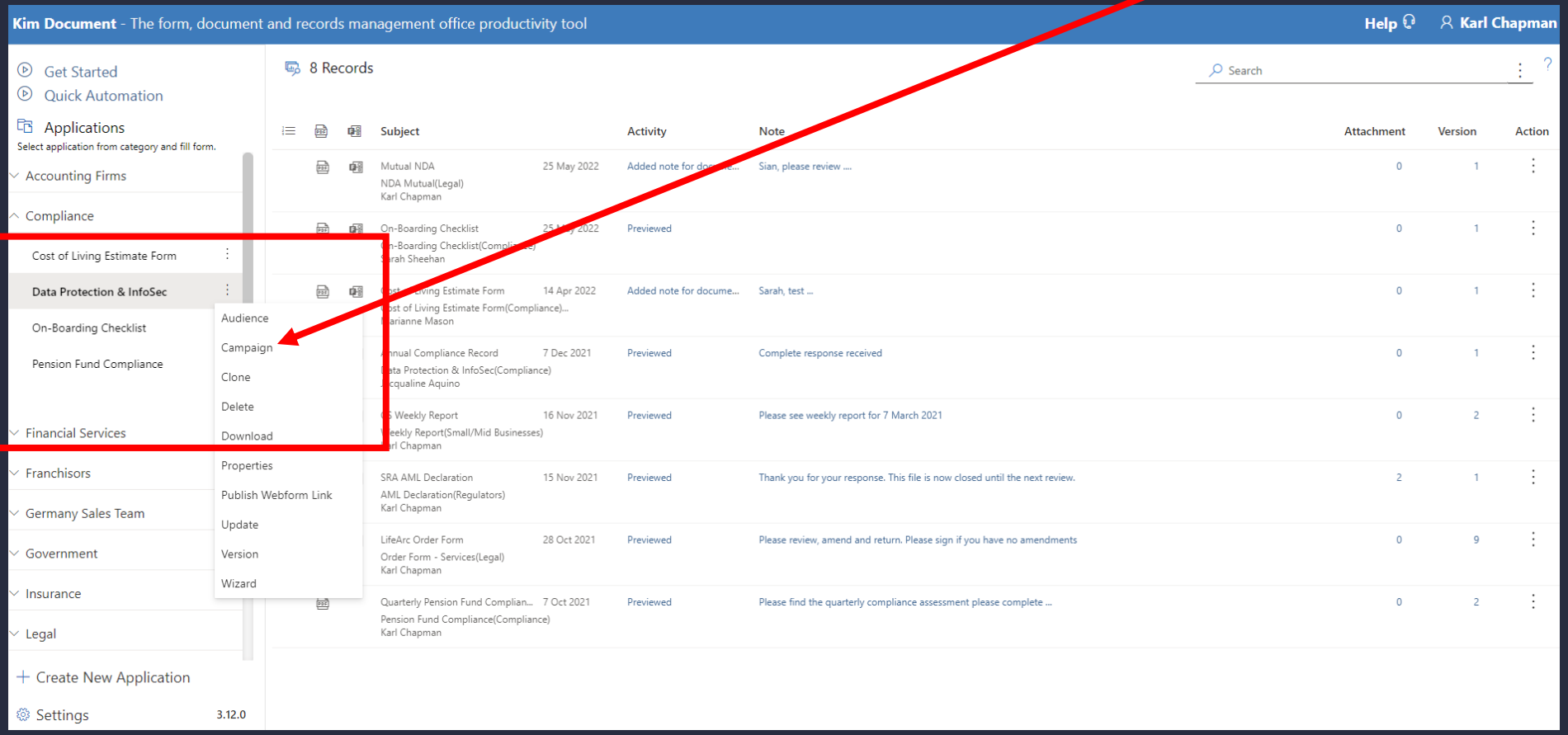
4. Recipient receives confirmation email with copy of response



5. Recipient response automatically tracked back into Kim and version control initiated – now version 2

Web applications - Campaign

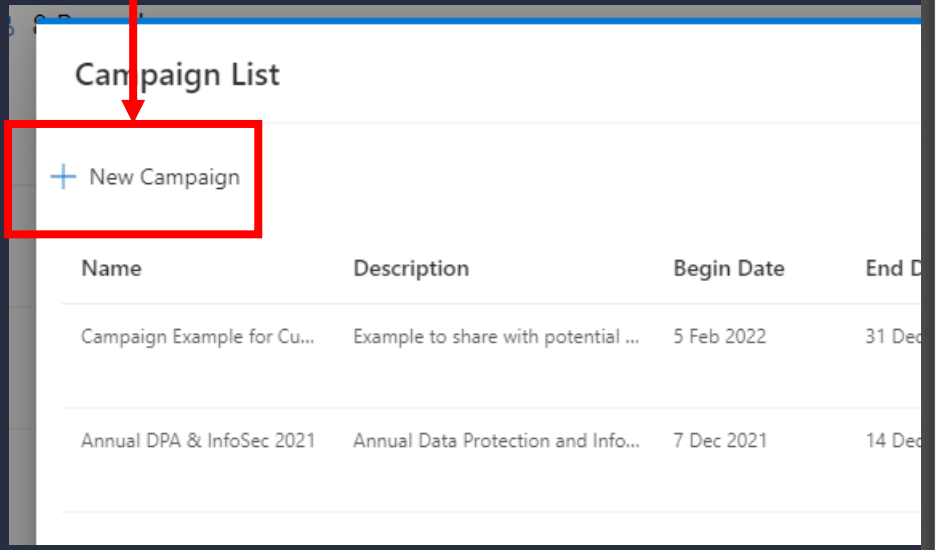
Rather than ‘share’ or ‘send webform update link’ your Use case is that you need to send a form to many 10’s or 100’s of Users at the same time, with the ability to track responses, send reminders, analyse the data and store the records. Having created your form, checklist or whatever it is, select ‘Campaign’

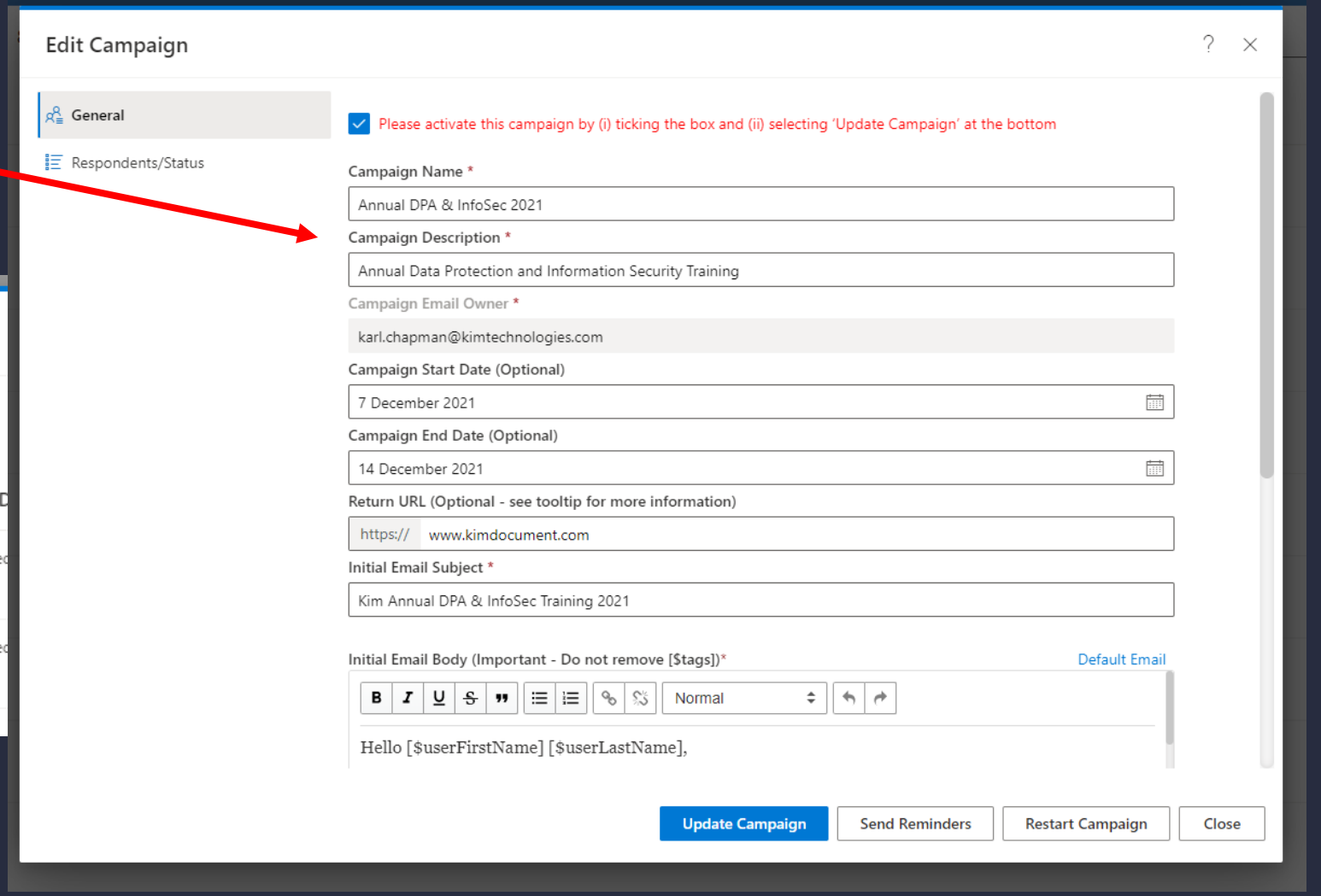


Web applications - Campaign

Select '+ New Campaign'

Add campaign details





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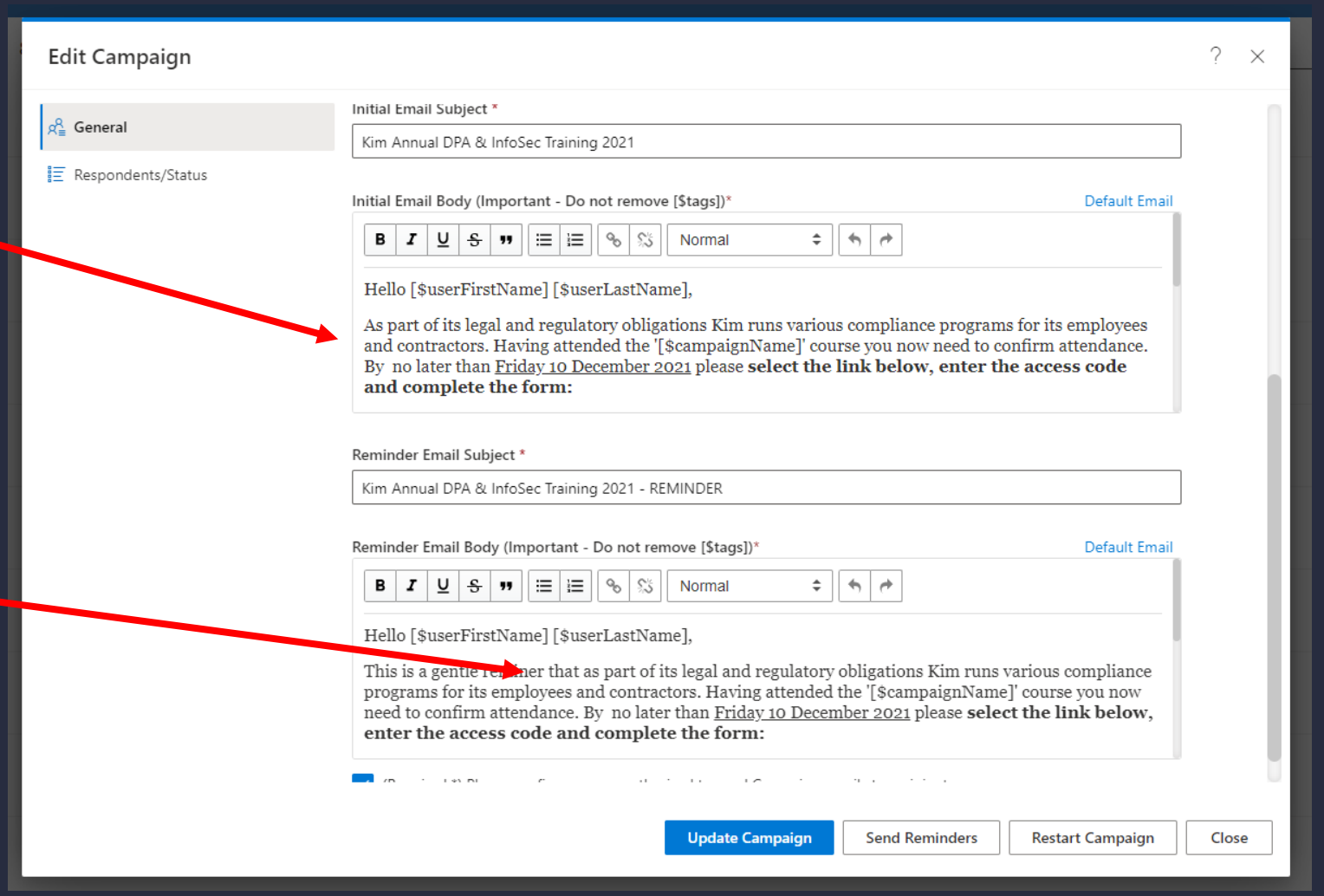
Web applications - Campaign

Write the initial email that the User will receive (which will also include the link to the form that you have created)

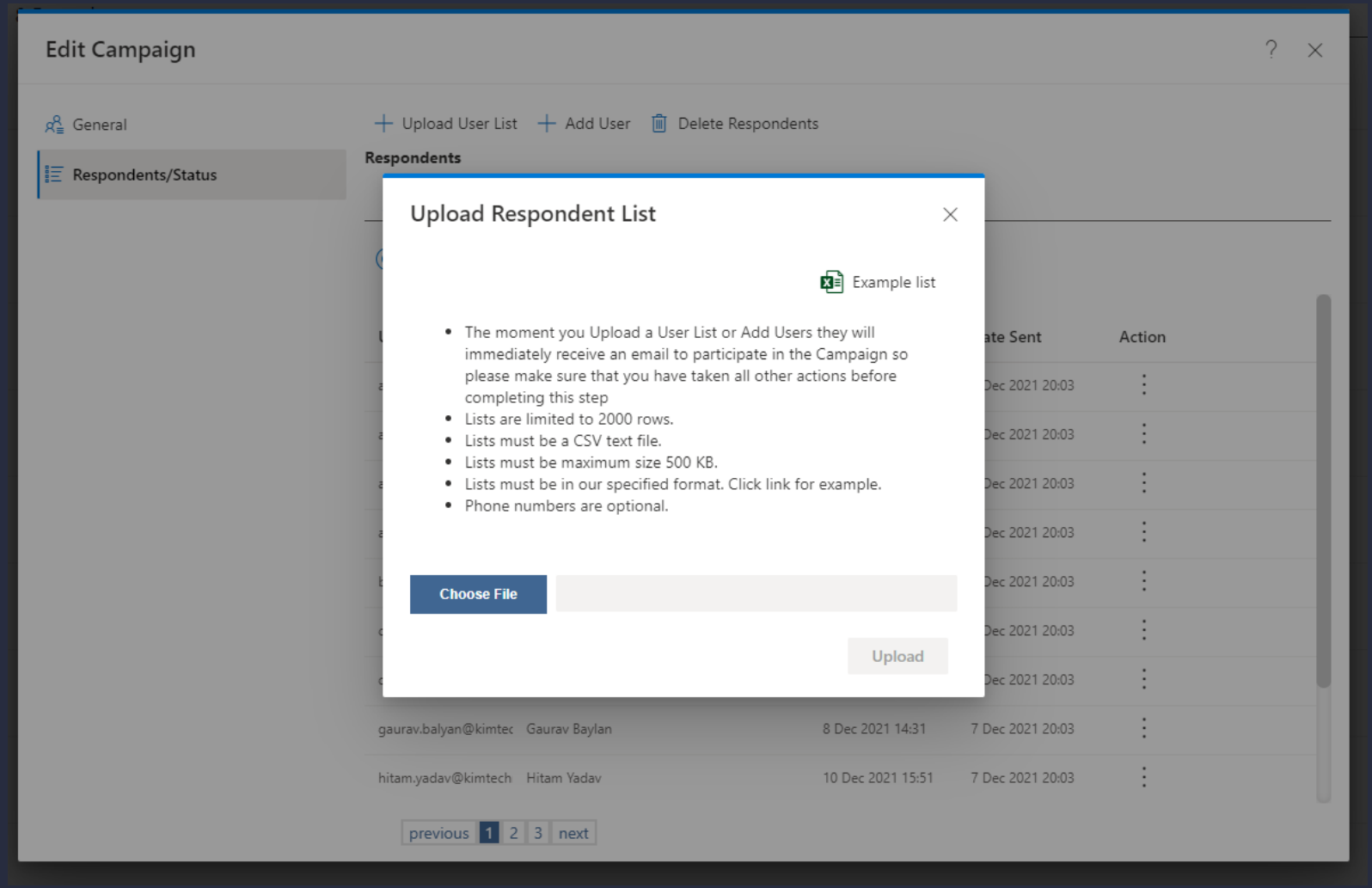
Also write the reminder email that can be sent when Users have not responded



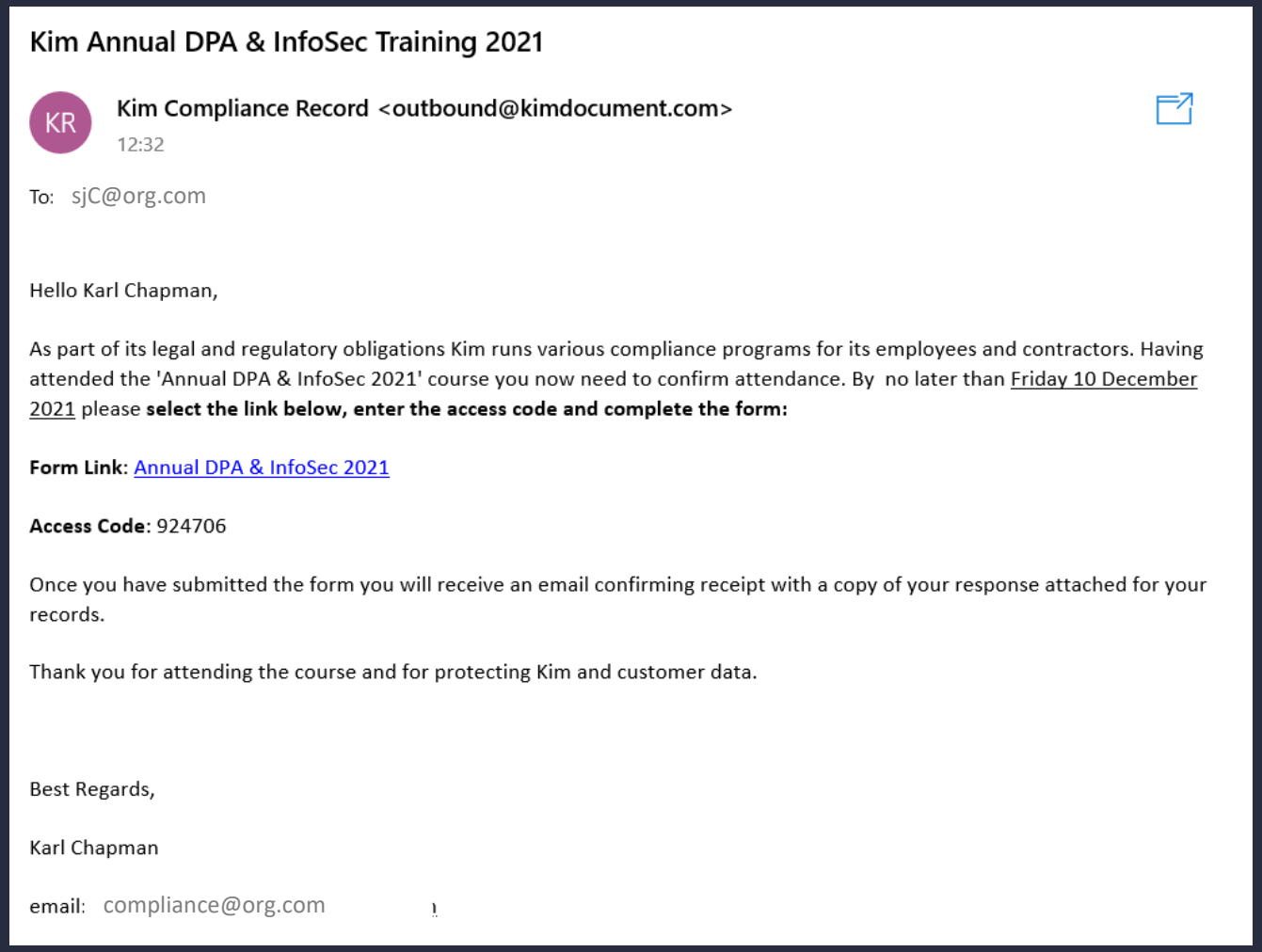
Web applications - Campaign

Either upload a list of the recipients of the campaign email and link, or add recipients manually

Send Campaign!



Web applications - Campaign



Kim Annual DPA & InfoSec Training 2021

KR

Kim Compliance Record <outbound@kimdocument.com>

12:32

To: sjC@org.com

Hello Karl Chapman,

As part of its legal and regulatory obligations Kim runs various compliance programs for its employees and contractors. Having attended the 'Annual DPA & InfoSec 2021' course you now need to confirm attendance. By no later than Friday 10 December 2021 please **select the link below, enter the access code and complete the form:**

Form Link: Annual DPA & InfoSec 2021

Access Code: 924706

Once you have submitted the form you will receive an email confirming receipt with a copy of your response attached for your records.

Thank you for attending the course and for protecting Kim and customer data.

Best Regards,

Karl Chapman

email: compliance@org.com

All recipients receive a personalised email (with the content you entered when you set up the campaign)

In the email there is a link with an individual verification code

Web applications - Campaign

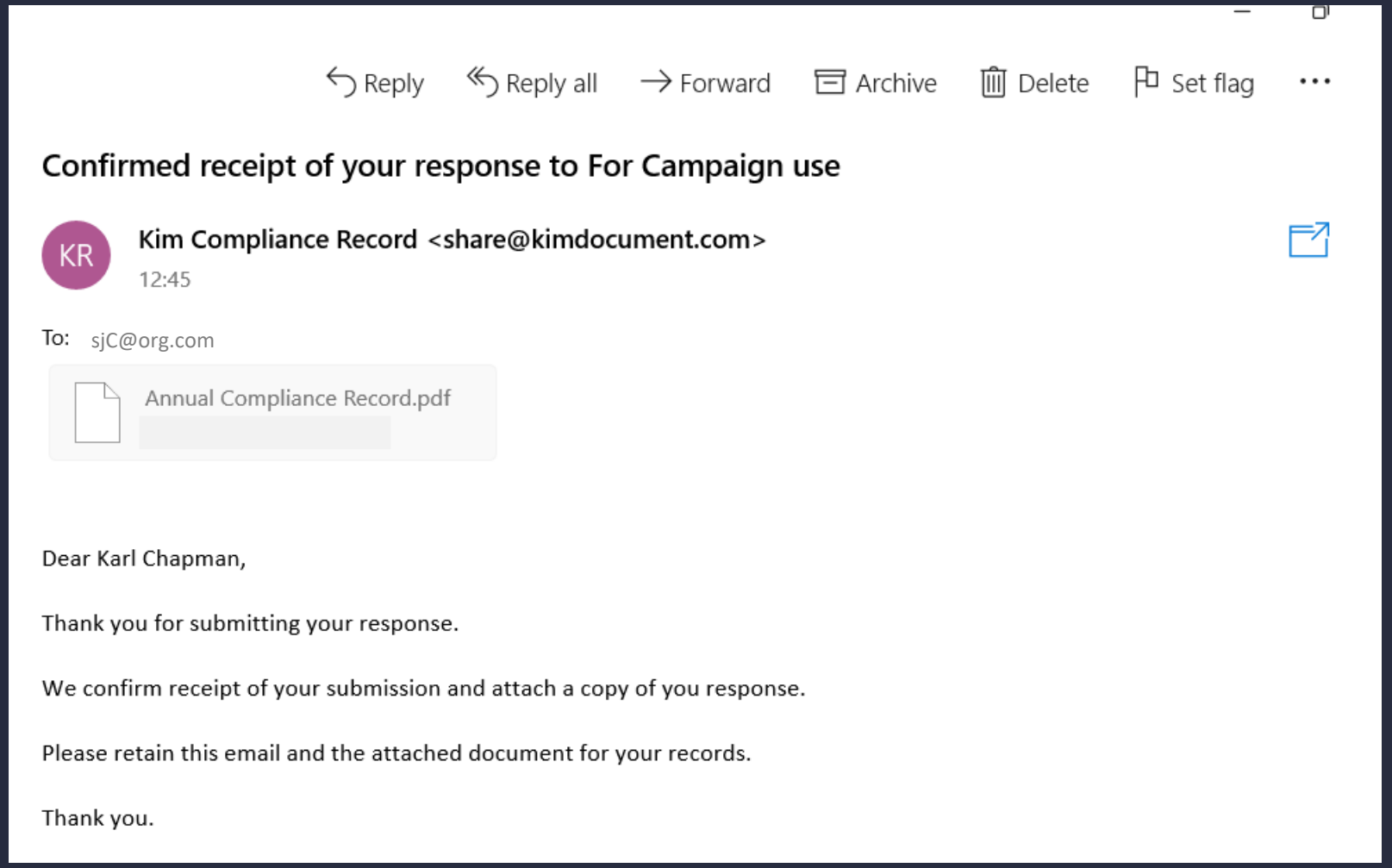
When a recipient clicks the link and enters their validation code they are presented with the compliance record form

The User completes the form and submits

Fields can be made mandatory (*) or optional

Web applications - Campaign

Having submitted the form recipients receive an email confirming receipt with a pdf copy of their response for their records

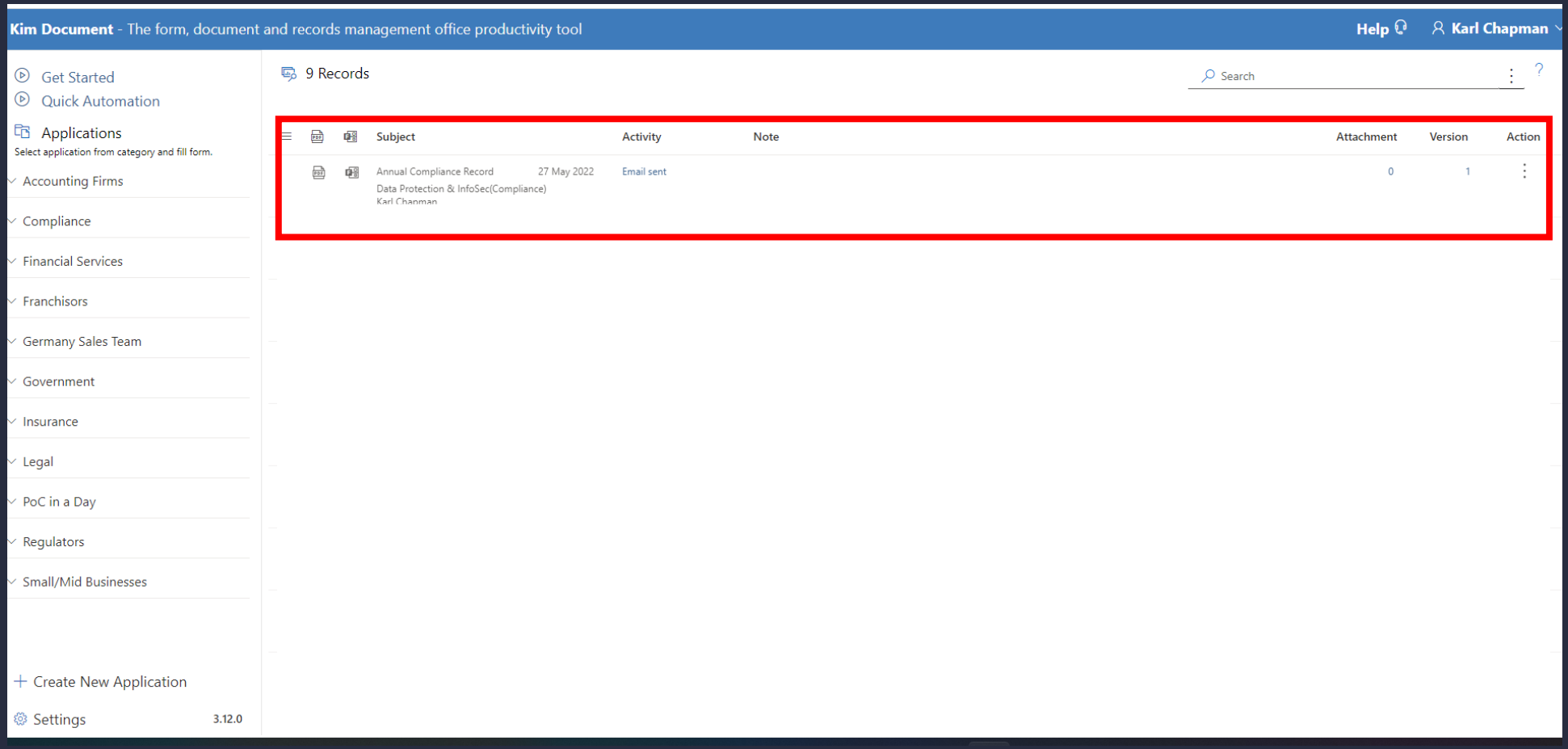


Web applications - Campaign

Analyze Results

All recipient responses come back into Kim

Full version control is automatically managed



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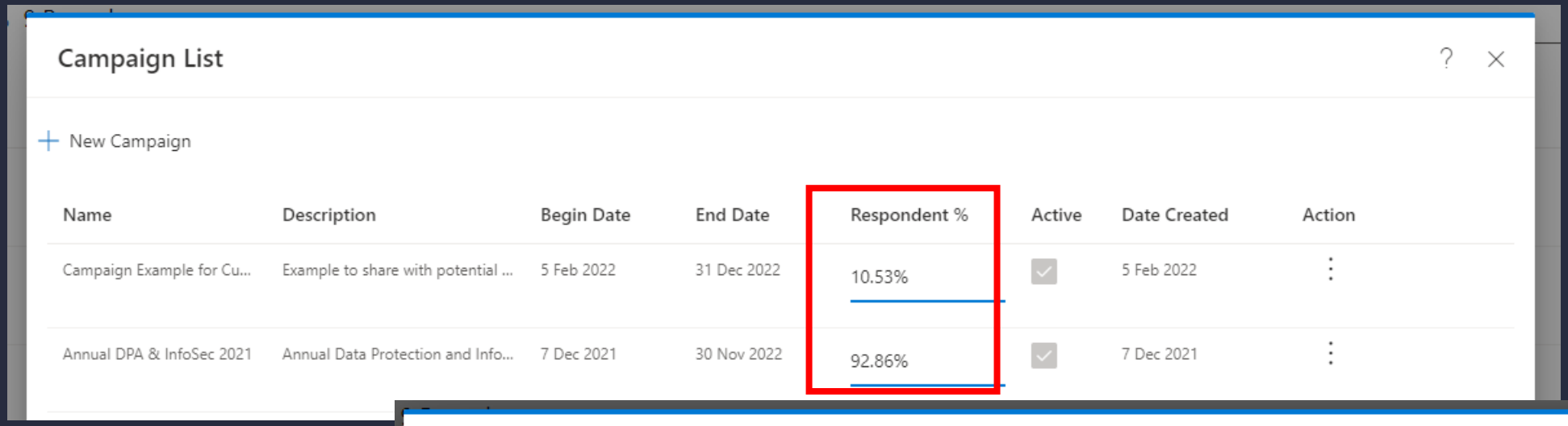
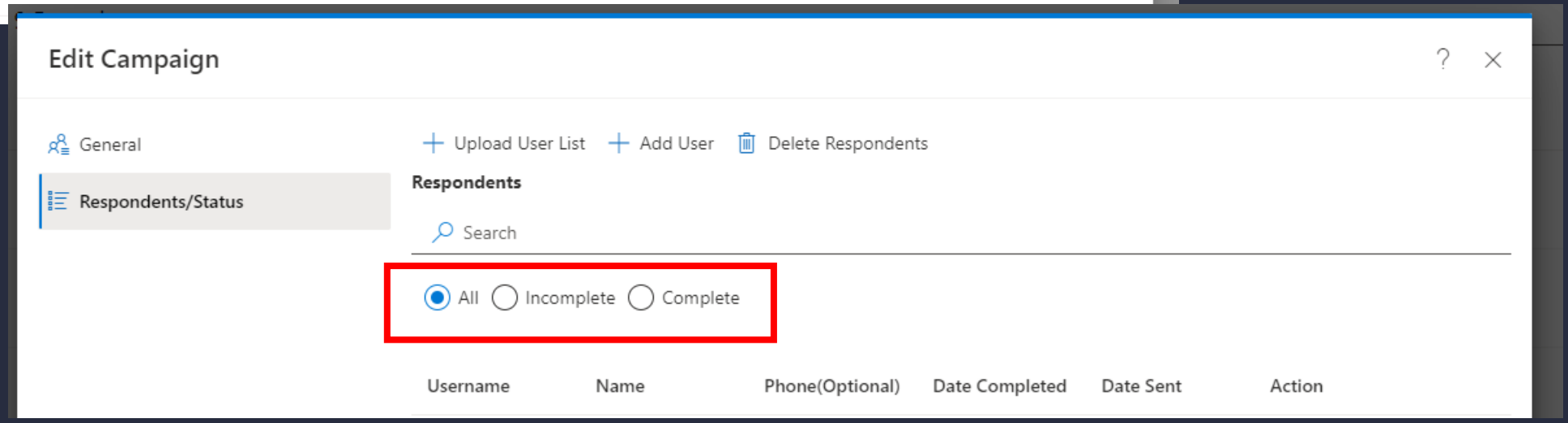
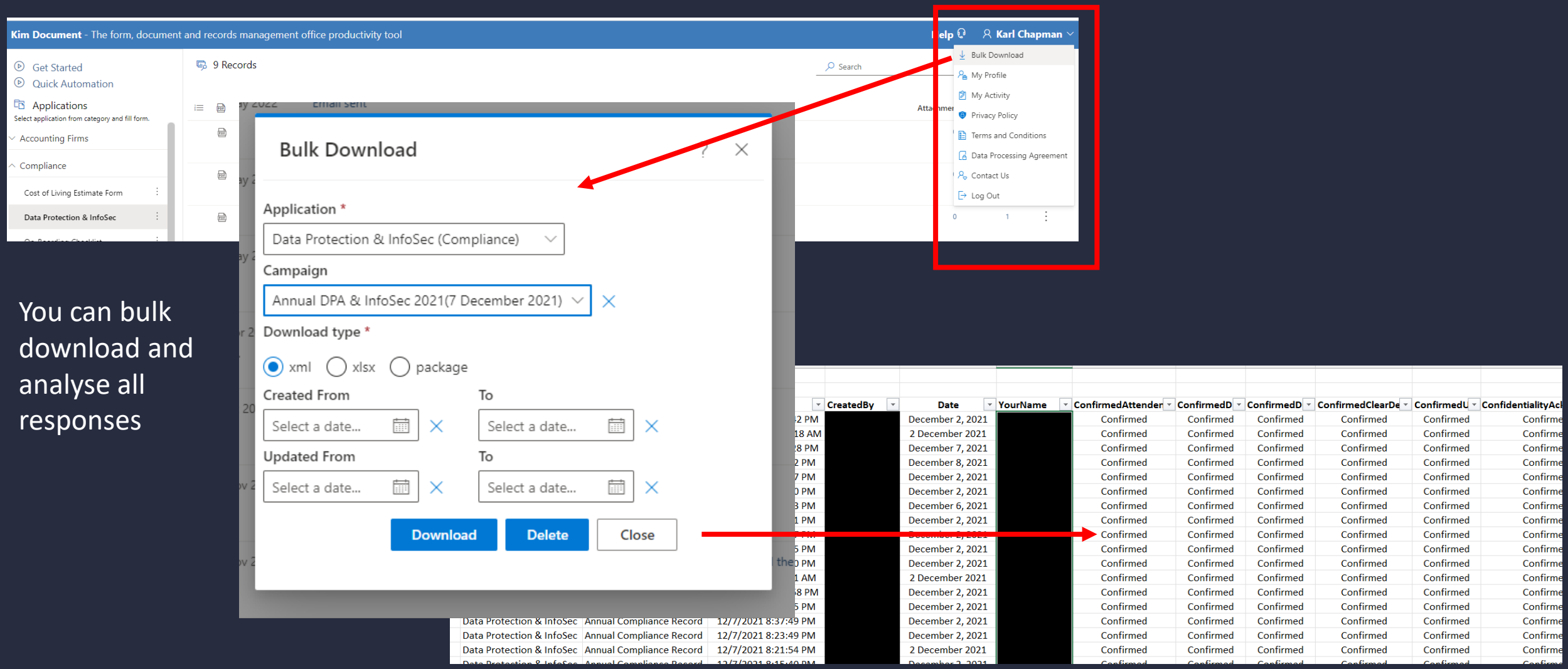
Web applications - Campaign





You can review overall response rates and track who has not responded and send out reminders

Web applications - Campaign



You can bulk download and analyse all responses

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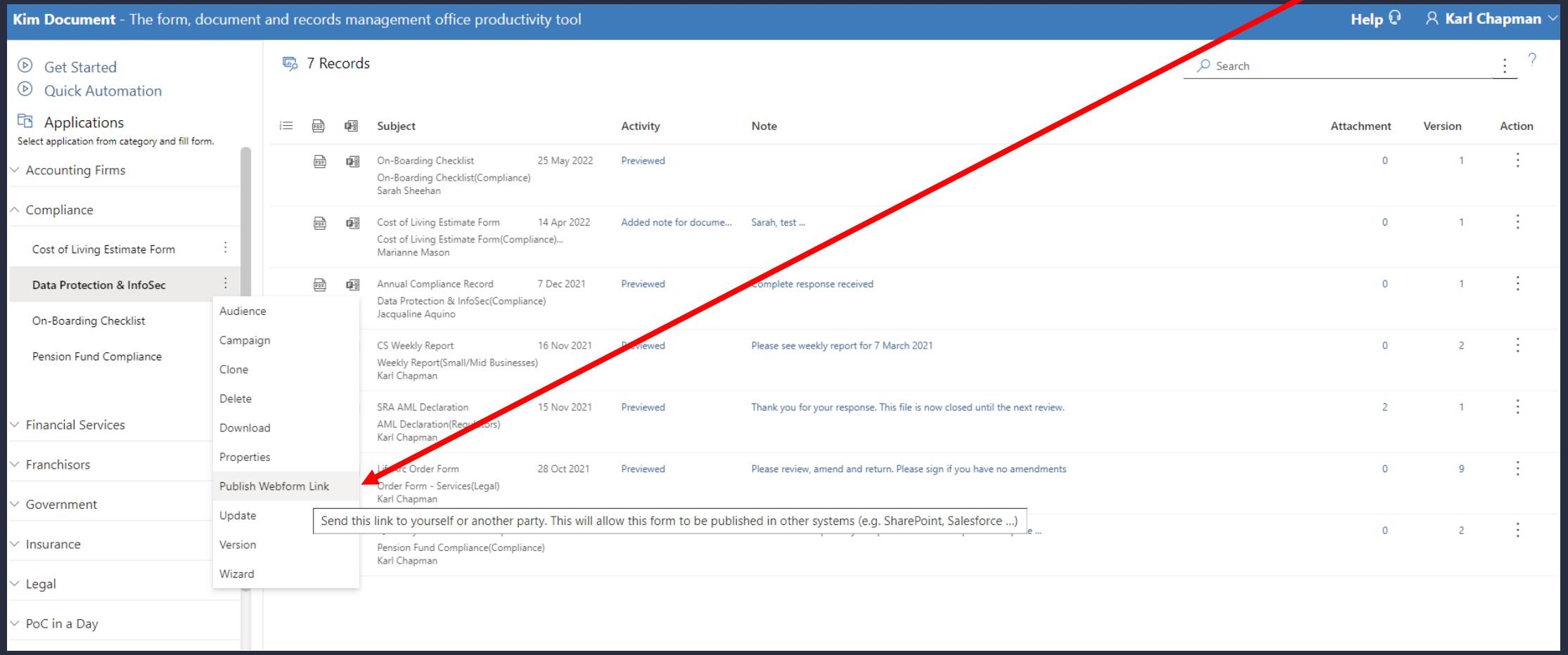
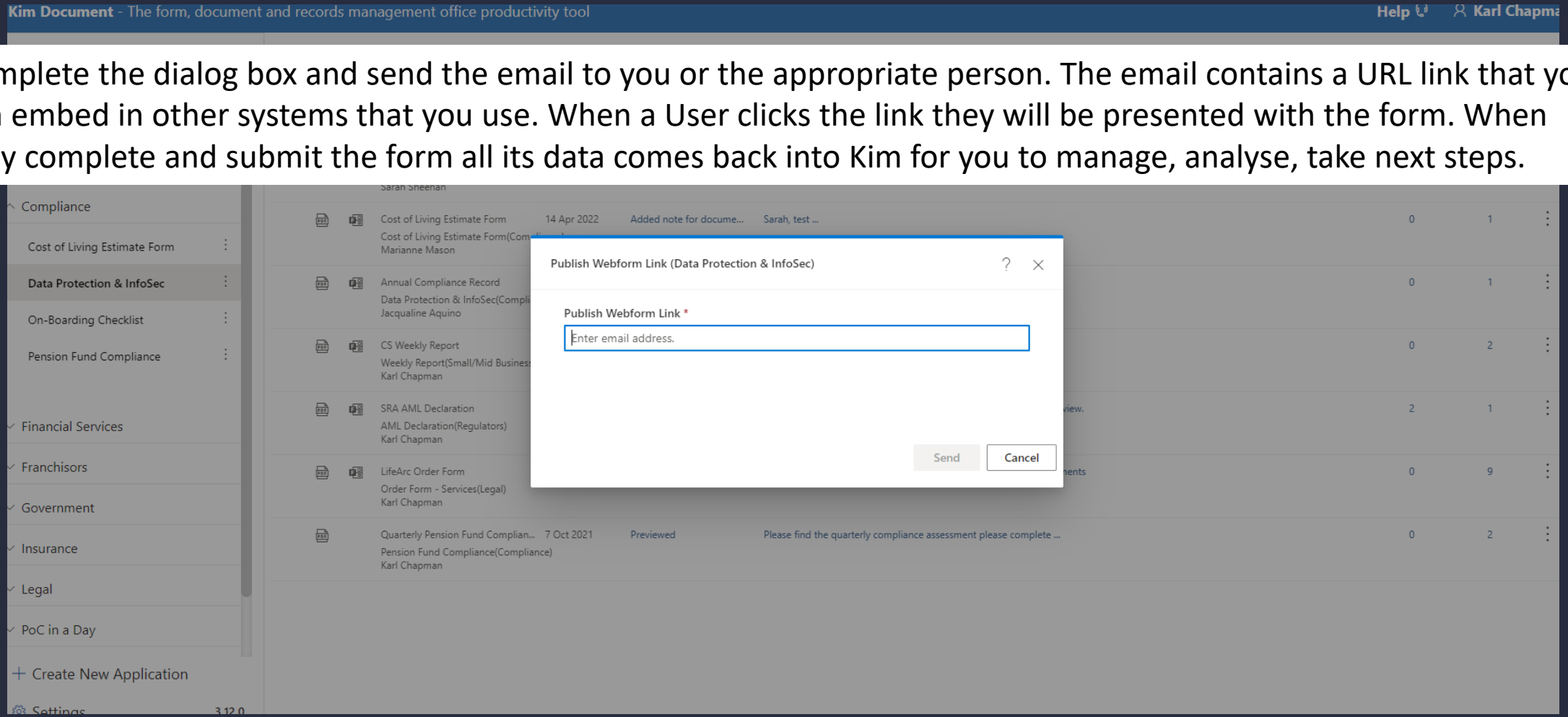
Web applications - Publish Webform Link

Your Use case is that you want to make the form, checklist, compliance document (whatever document you have automated) available to all your colleagues via Salesforce, Sharepoint … etc. Simply select 'Publish Webform Link'



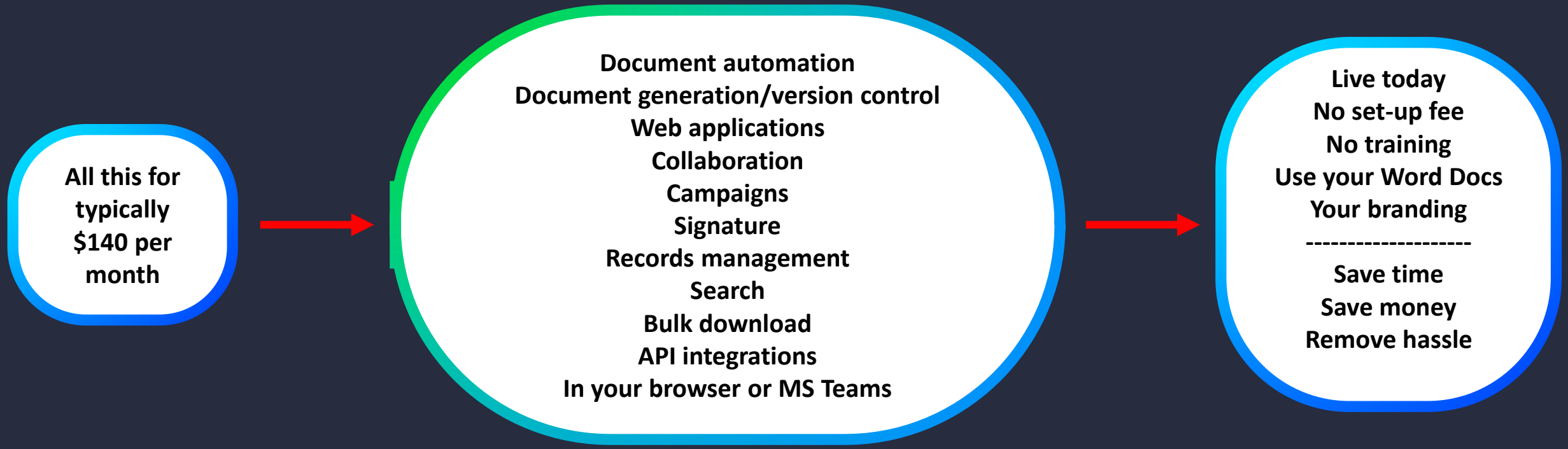
Web applications - Publish Webform Link

Complete the dialog box and send the email to you or the appropriate person. The email contains a URL link that you can embed in other systems that you use. When a User clicks the link they will be presented with the form. When they complete and submit the form all its data comes back into Kim for you to manage, analyse, take next steps.



Kim Document: A no-regrets decision

Why spend more? Why wait weeks when you can be live today? Why use developers when you can create web applications and automate your documents with no training?



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Faster. Better. Cheaper

Simply take your existing letters, forms, checklists, compliance records, contracts and <u>today</u> …

1. Tag it
2. Upload it
3. Automate it
4. Activate it
5. Share it
6. Analyze it

Faster. Better. Cheaper

Faster

1. Available <u>now</u> via your browser or MS Teams, no new software to download
2. Easy to use interface requiring no User training
3. Use your existing Word documents (or Kim Examples) and be live within 30-90 minutes
4. The Kim Wizard enables ‘drag-and-drop’ creation of User forms and data fields
5. Bulk download of all data facilitates easy analysis of responses / activity

Better

1. High User adoption because seamless in MS Teams and your browser
2. Quickly automate and ‘Share’ a document, internally and/or externally, with checkout and version control
3. Run ‘Campaigns’ for up to 2,000 recipients, track progress, bulk download and analyse results
4. Publish links to your documents on internal or publicly facing systems/sites for Users to complete

Cheaper

1. Only the individuals that automate and activate your documents pay a license fee. Colleagues and customers/third parties who consume the documents pay no fee
2. For example:

   Person A automates your NDA. 10 Sales people in your organization send it to 100 customers. Only Person A pays Kim a license fee
3. From $50/£50/Eur50 per month

Faster. Better. Cheaper

Some Key Features

1. A SaaS solution hosted in EU, UK & USA Kim managed MS Azure sites
2. Use your existing Word documents or Kim ‘Examples’
3. Unified Workspace enabling all activity from one screen view
4. Kim ‘Example’ documents (e.g. NDA, On-boarding Checklist …)
5. Drag-and-drop automation ‘Wizard’
6. Extensive internal and external collaboration via ‘Email’, ‘Share’ and ‘Send Webform Update Link’

Benefits

Save time, money and hassle

1. Live in minutes, secure, no implementation fee
2. Use the documents you already have, make available internally and/or externally, realise benefits from day one
3. Easy User experience, everything in one place, few clicks, no training required
4. You can take a Kim example document, press ‘Create’ and you can use it internally/externally within minutes
5. Take your existing documents (content, layout, branding) upload into Kim and use the Wizard to quickly automate
6. Flexibility in how you choose to interact with colleagues/third parties with full records management

Faster. Better. Cheaper

Some Key Features

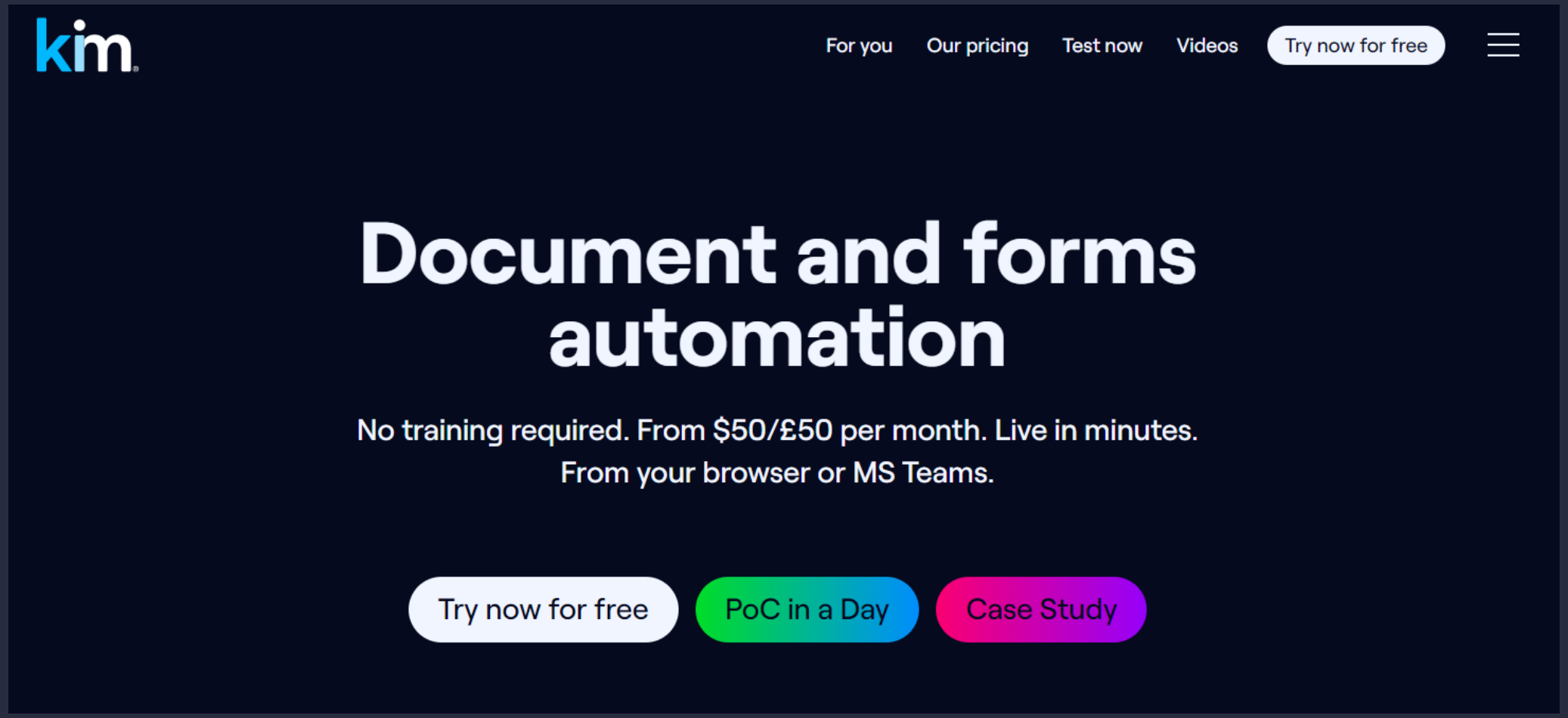
7. Send and manage ‘Campaigns’ to up to 2,000 recipients
8. Create in Kim and ‘Publish Webform Link’ that can be embedded on your other internal / publicly facing systems
9. Easy ‘Bulk Download’ of all data
10. Enterprise ‘Search’
11. Ability to ‘Checkout / Check-in’ document collaboration and full ‘Version Control’
12. Full ‘Records management’
13. Accessed via your browser or MS Teams
14. Integration via Kim APIs

Benefits

Save time, money and hassle

7. Upload once, distribute automatically to all recipients, track progress, send reminders analyse results
8. Meet your target audience where they are, by creating in Kim and publishing the link on systems people already use
9. Easy and quick analysis of all activity and data
10. Quick to find what you need using Search/Advanced Search
11. Easy collaboration and tracking of latest version, plus audit trail for all changes
12. Records management, audit trail and archiving
13. Drives User adoption
14. Enables wider deployment of Kim

Sign up at www.kimdocument.com



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