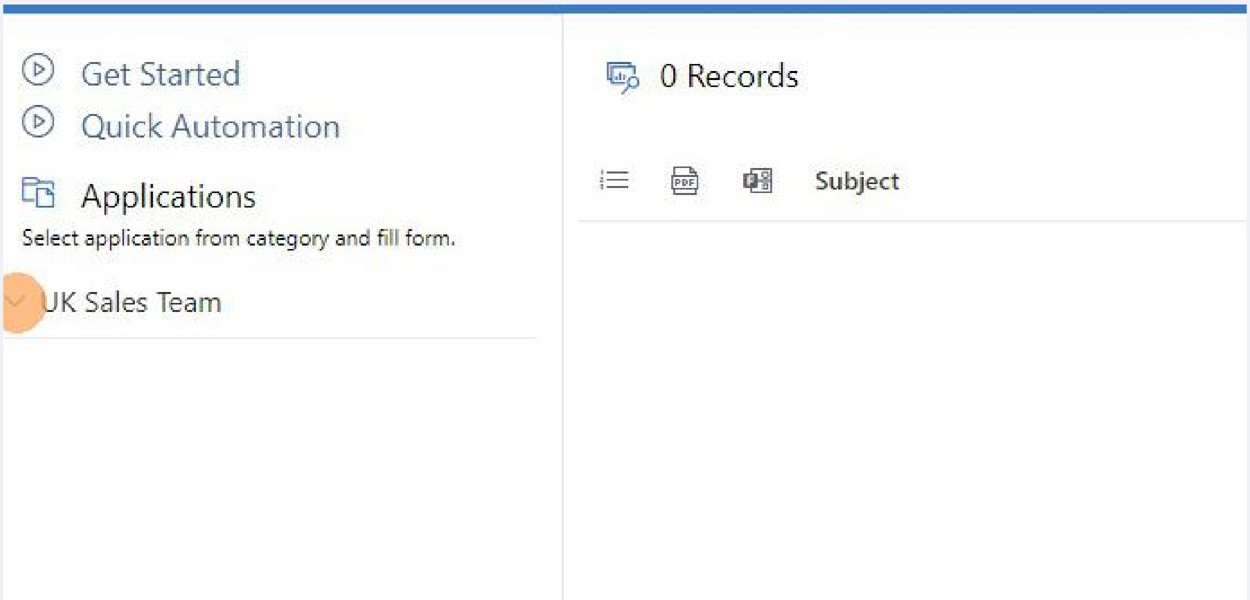
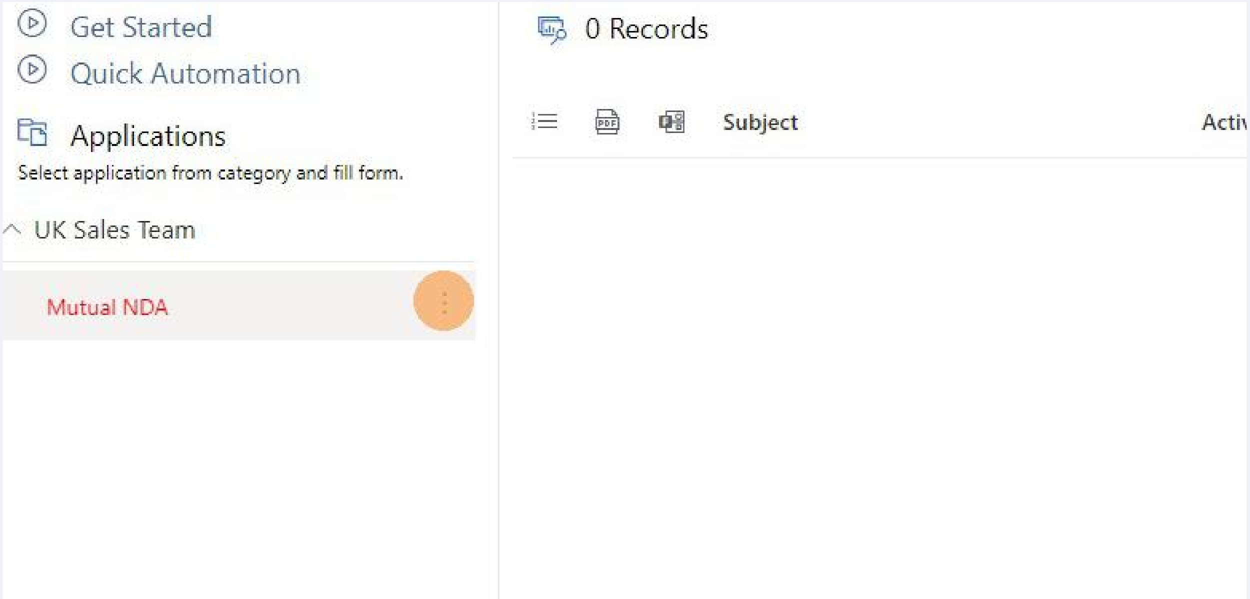
3. Automate It - How to Automate a Document

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.

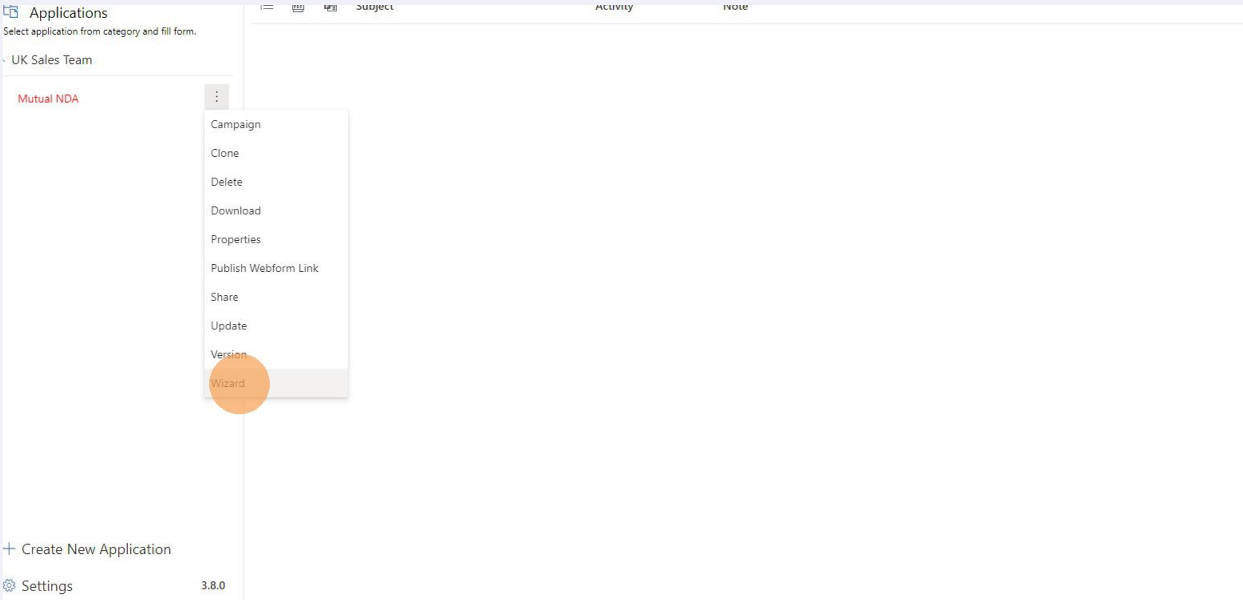
1 You have tagged and uploaded the document you want to automate. Select the Application heading it sits under (here it is 'UK Sales Team').



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'.



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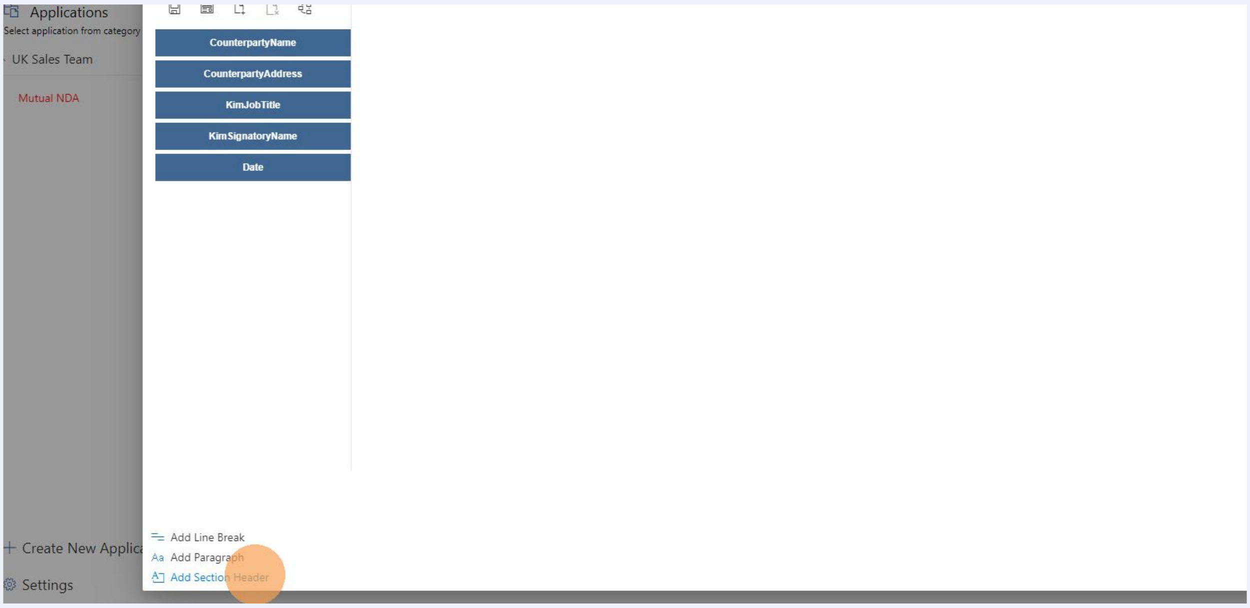
When you select Wizard you will see this screen. In the left-hand sidebar all the tags you put in the document you uploaded are now available for automation. To start, drag and drop the 'Add Section Header' to the top left of the screen.



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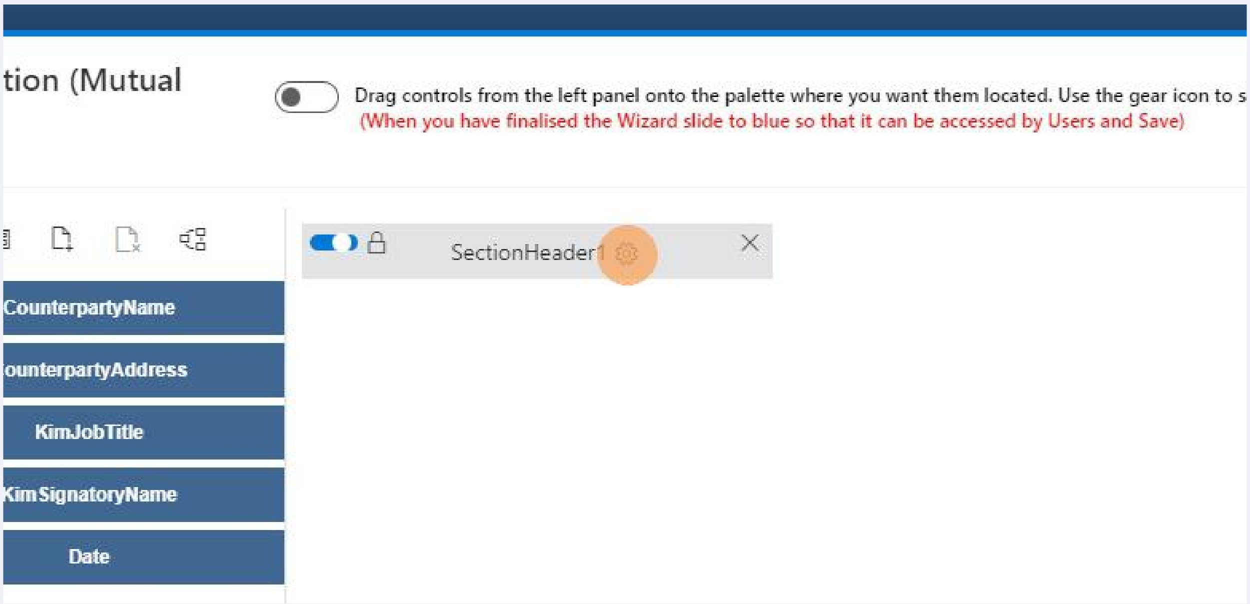
Having drag and dropped the Section Header to the top of the screen, click on the cog.



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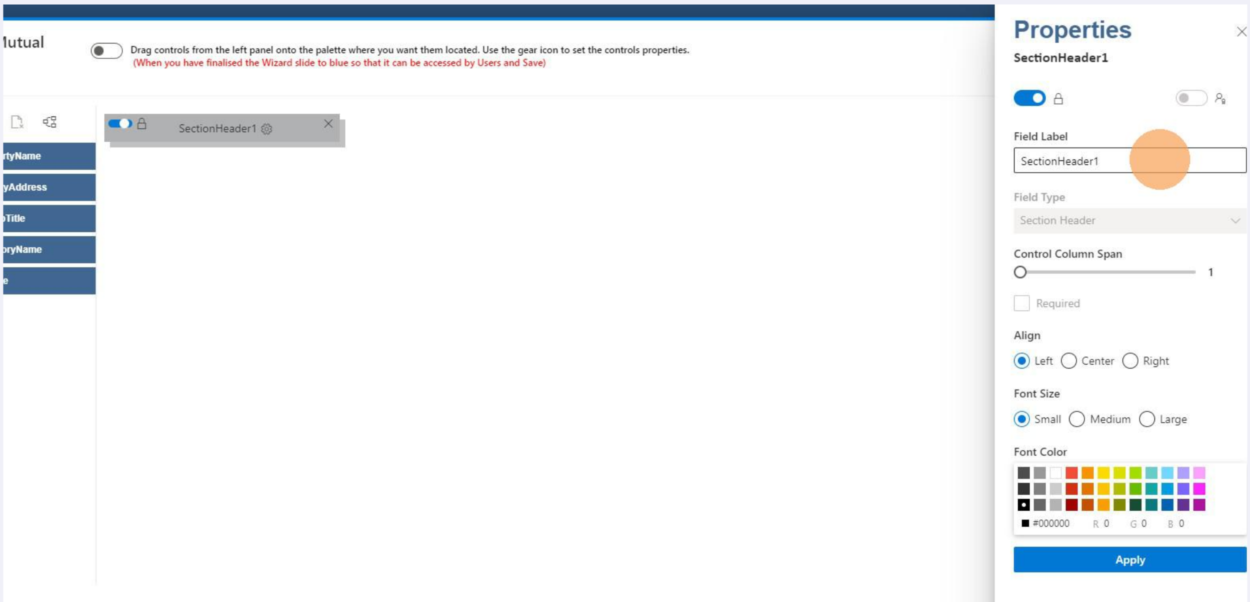
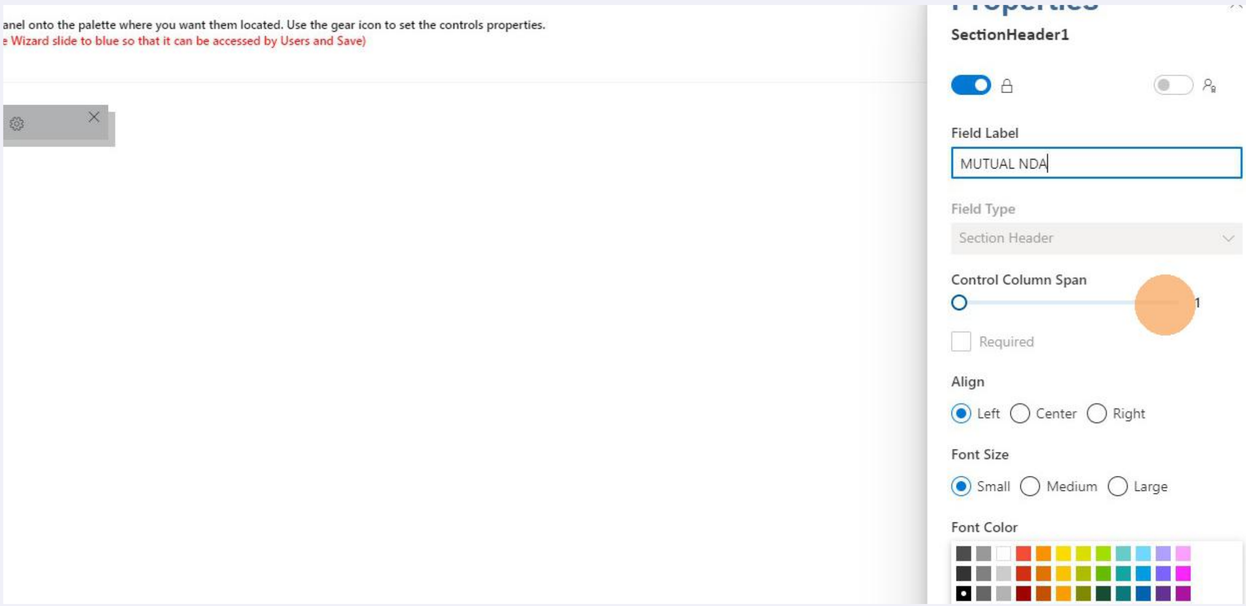
When you click on the cog the right hand menu appears. This menu allows you to set the properties for this field. TIP 1: When you click a cog different menus appear depending upon whether it is a 'Tag' that you created in the document or a 'Section Header' or 'Paragraph'

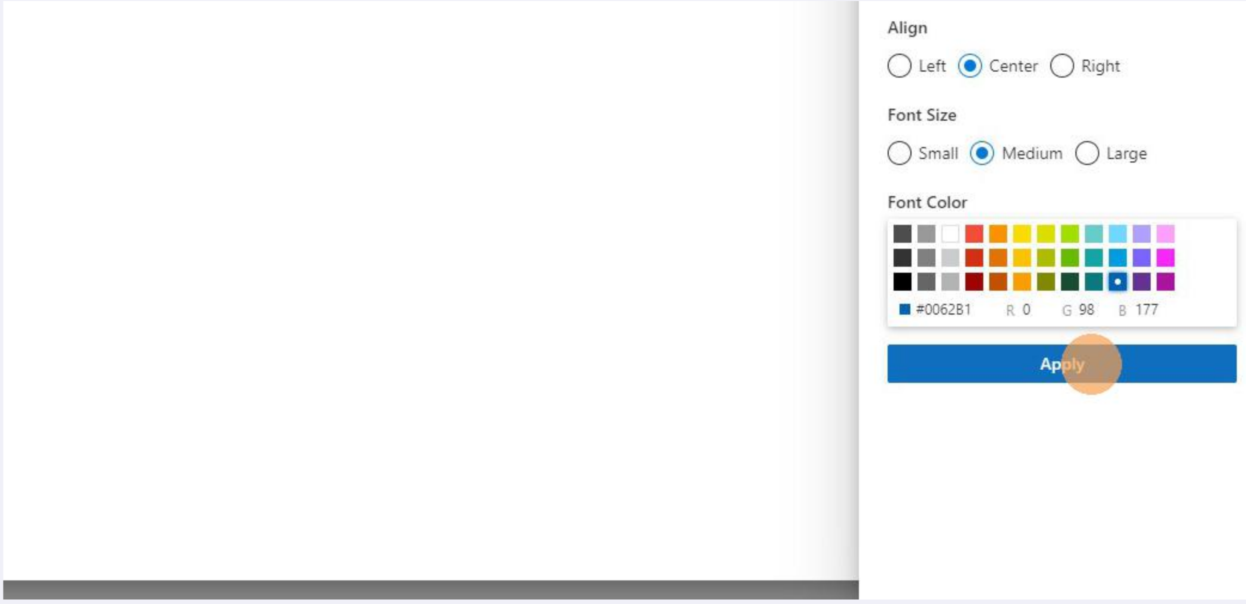


7

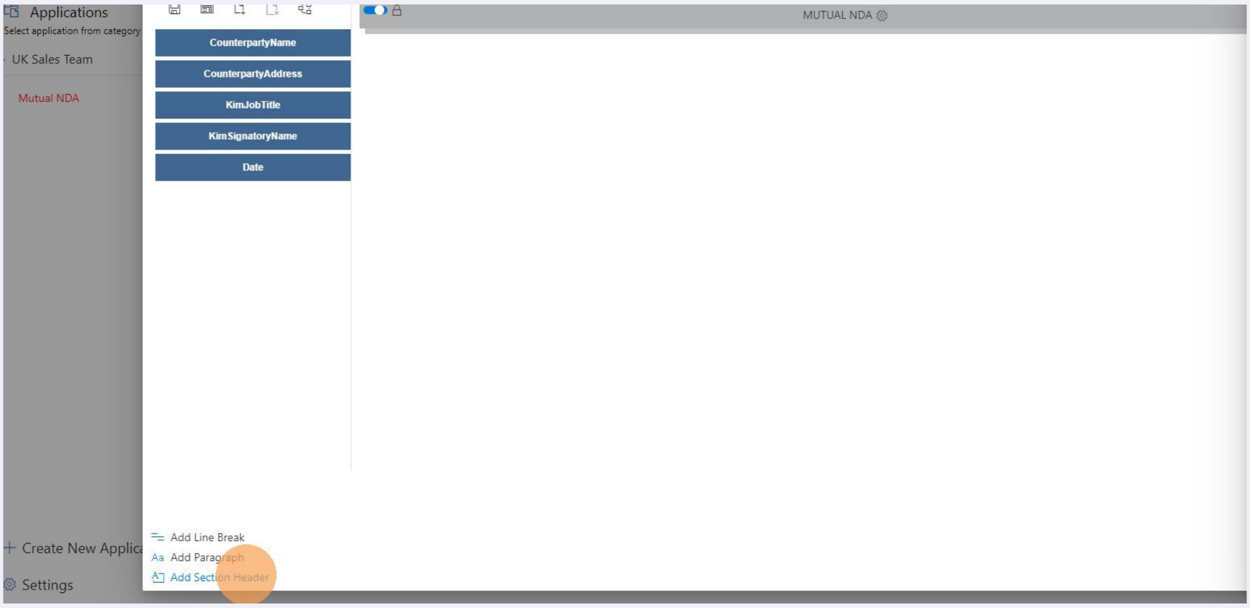
In the 'Field Label' type the heading for this form. In this example it is 'MUTUAL NDA'. TIP 2: Section headers at the top of forms can look good in capitals. Now select the 'Control Column Span'. This is in a range of 1 to 4. Select 1 and this sees the heading top left over one column, select 4 and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



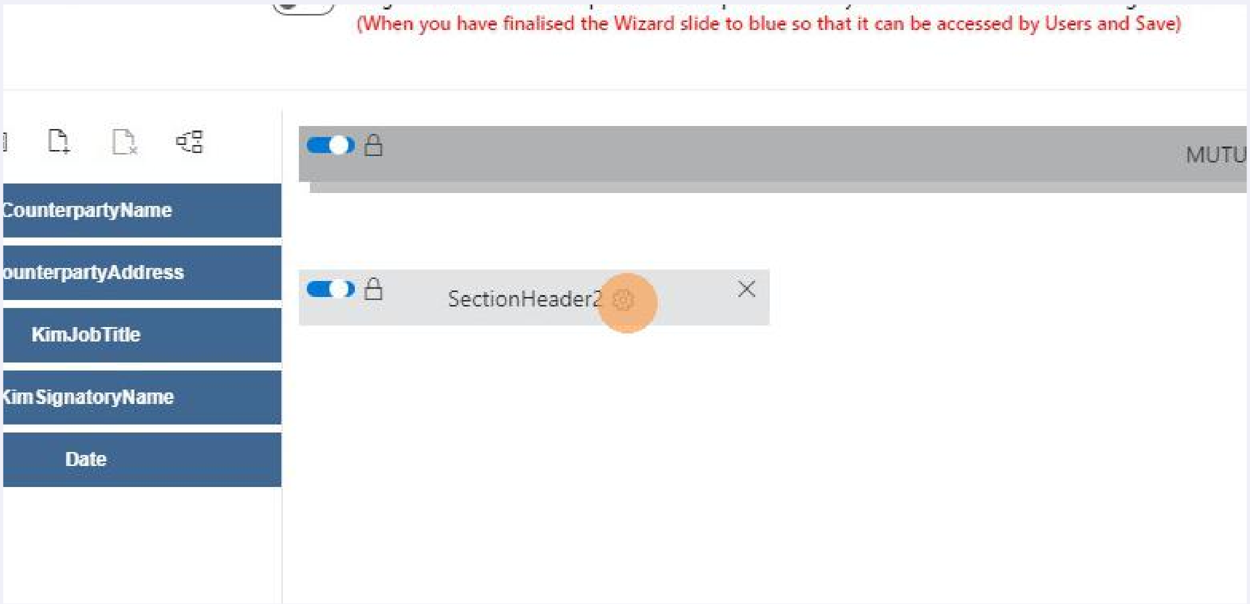
8 Having selected 4 for the Column Span you can now position the heading, select the size of the font and its colour. Having done this 'Apply' and your selections will be saved.



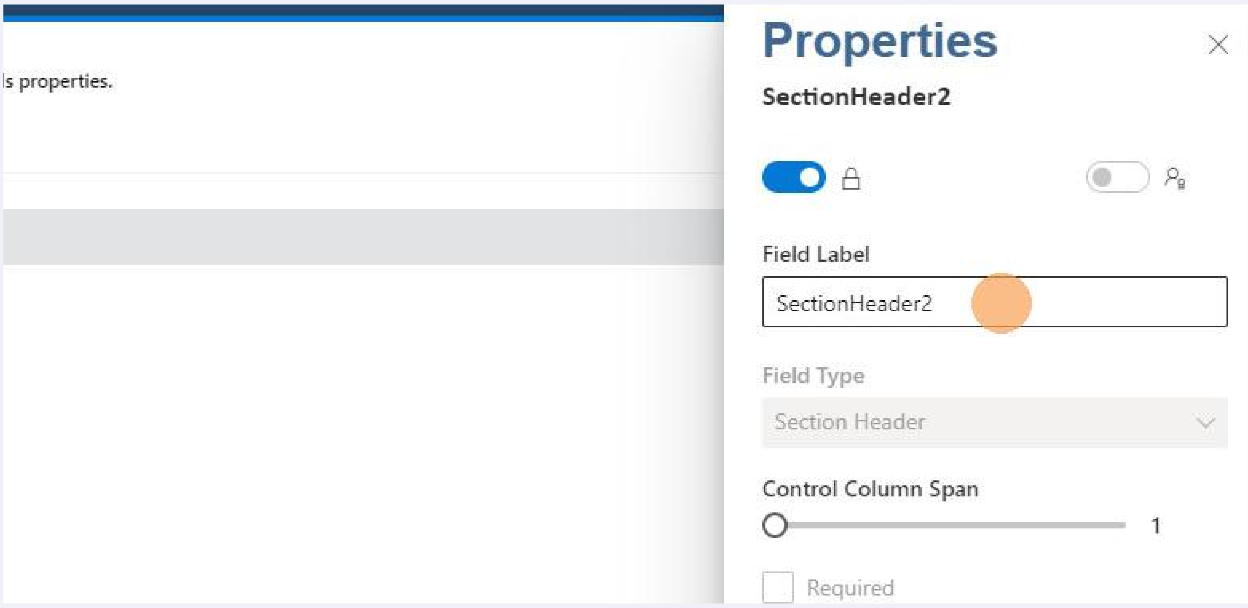
9 With the overall form name set up, drag and drop another 'Add Section Header' so that you can name the first section of the form. TIP 3; Think of the form from a Users perspective and make it easy for them to follow the structure and the language. Drag and drop this under the 'Mutual NDA' heading.



10 Click on the cog.

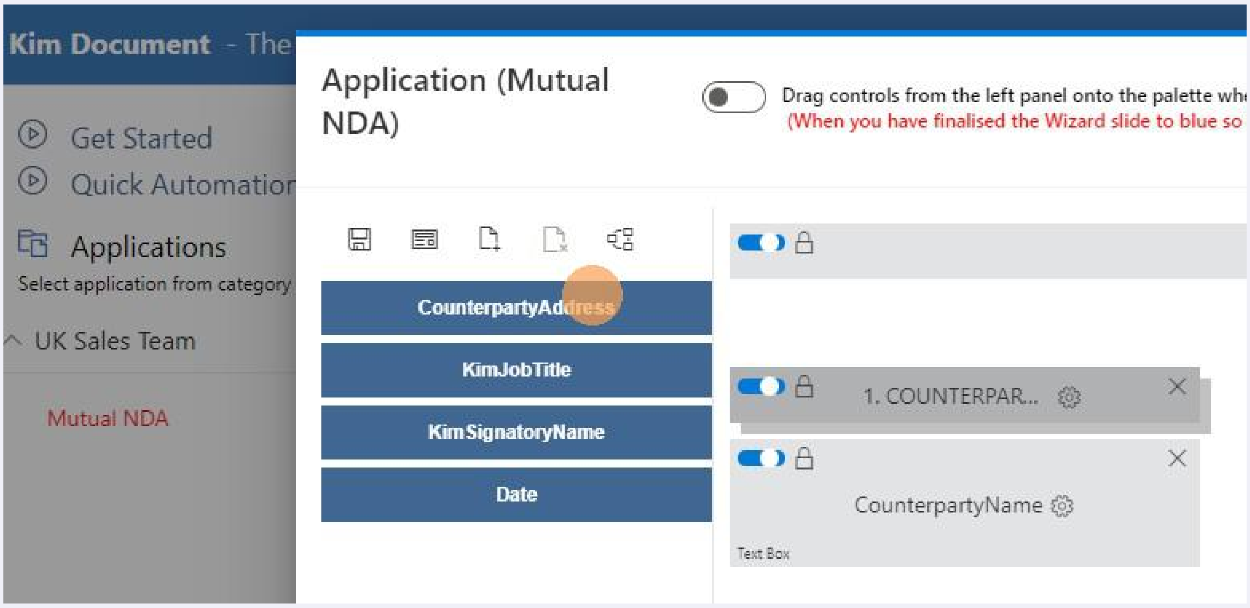


11 Click on 'SectionHeader 2'

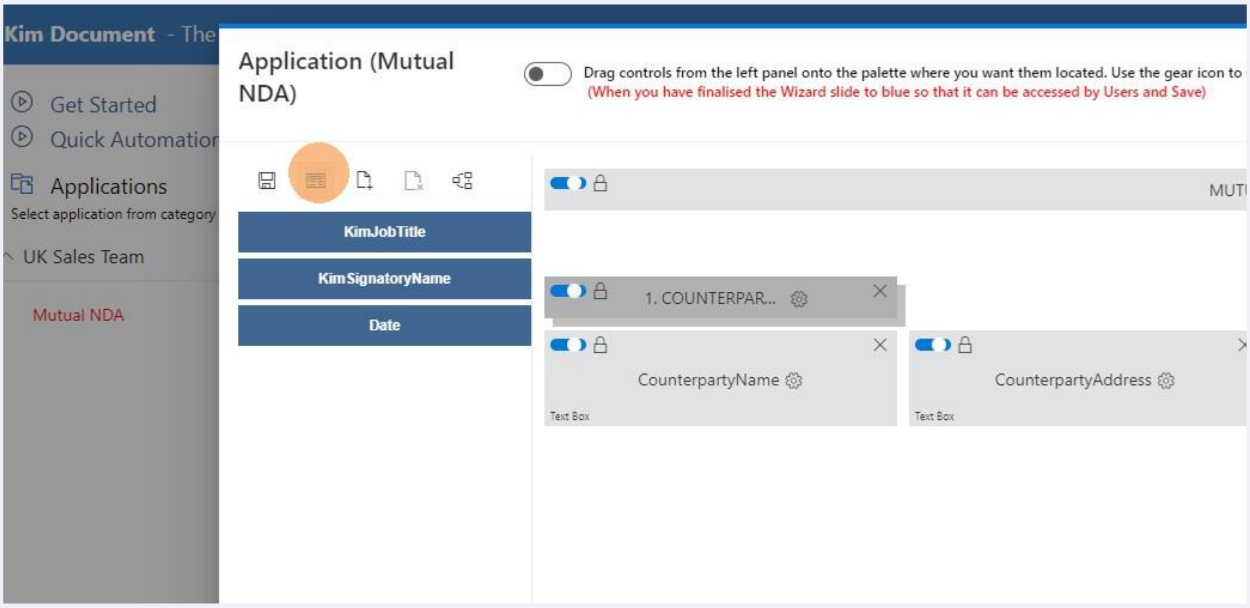


12 Add in your section header. In this example it is '1. COUNTERPARTY DETAILS'. Complete the rest of the fields ('Align' and 'Font Size') add any colour (the default is black) and 'Apply'.

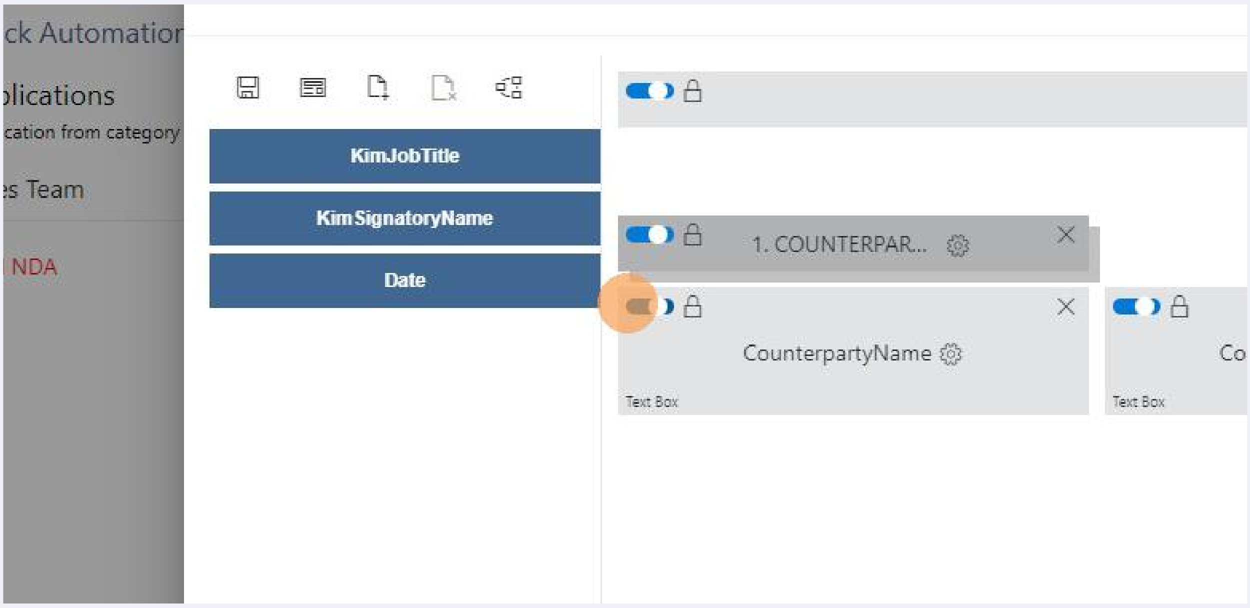
13 With the first section header in place, drag and drop the tags relevant to this section under the header in the order you want them to appear to a User.



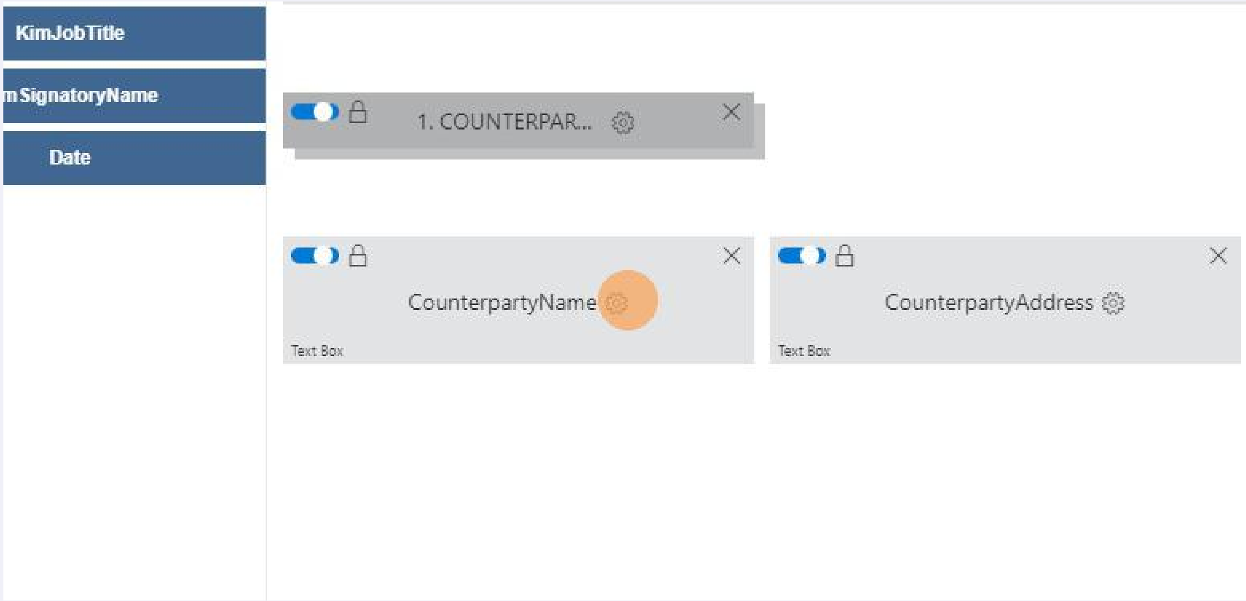
14 At any time you can click the preview button to see how the form will look to a User. TIP 4: Save your Wizard at regular intervals so that you do not accidentally lose your work.



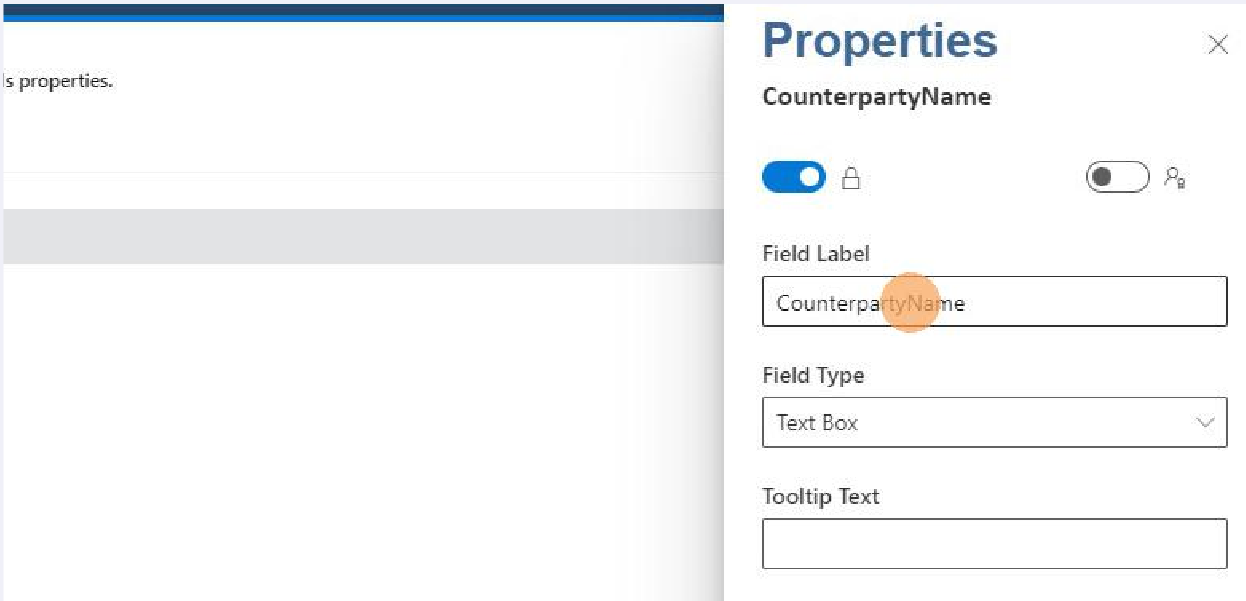
15 If having previewed it, you want to change the layout, simply return to the Wizard, unlock the tag(s) you want to move, drag and drop them to their new position, and re-lock. TIP 5 Always re-lock a tag when you have moved it to your preferred position. If you leave it unlocked it will move when you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



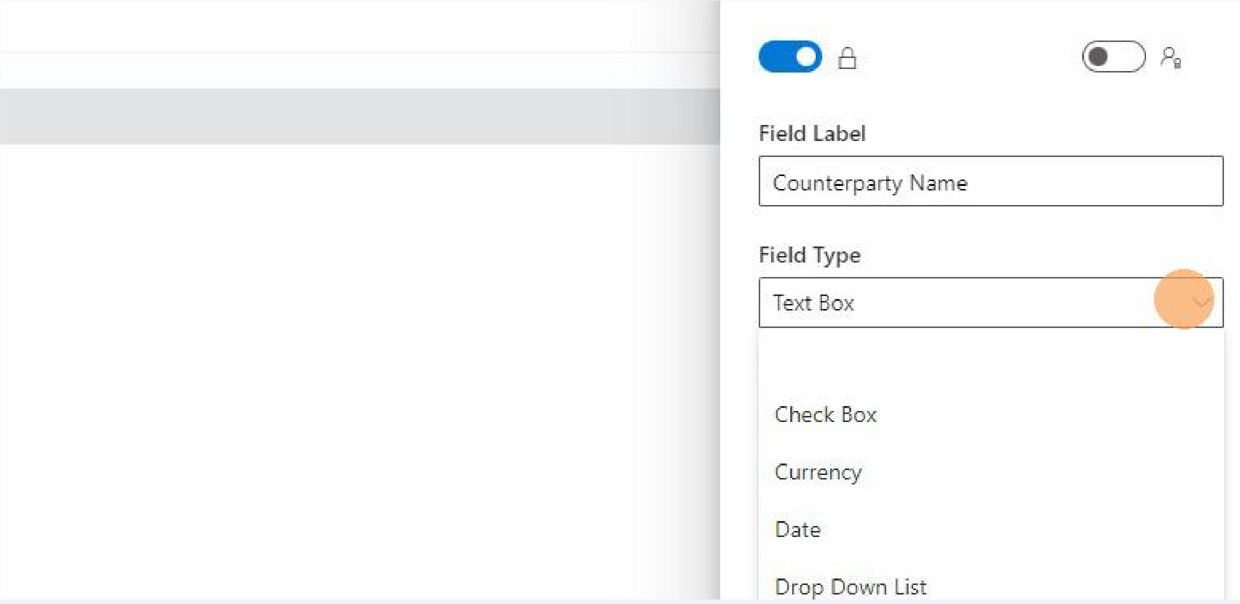
16 With your tags in the right position, click on the cog.



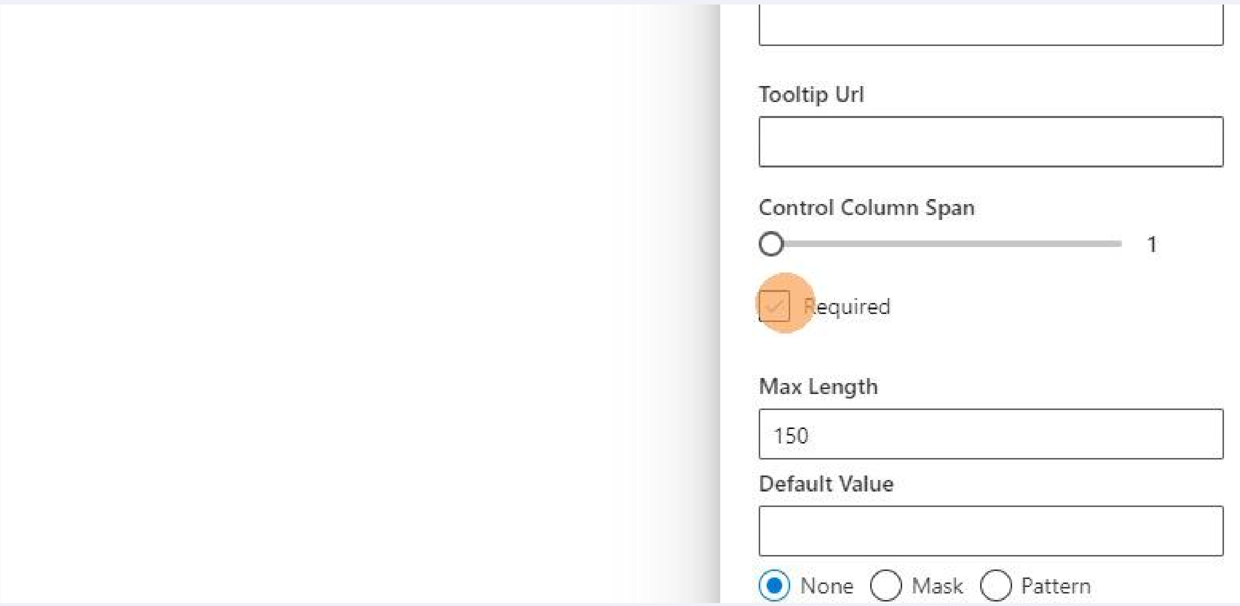
17 You can now add the properties for this tag. Firstly amend the 'Field Label' to what you wish the field heading to be. This should be easily understood by a potential User. You could change this to 'Add Counterparty Name' or just 'Counterparty Name'.



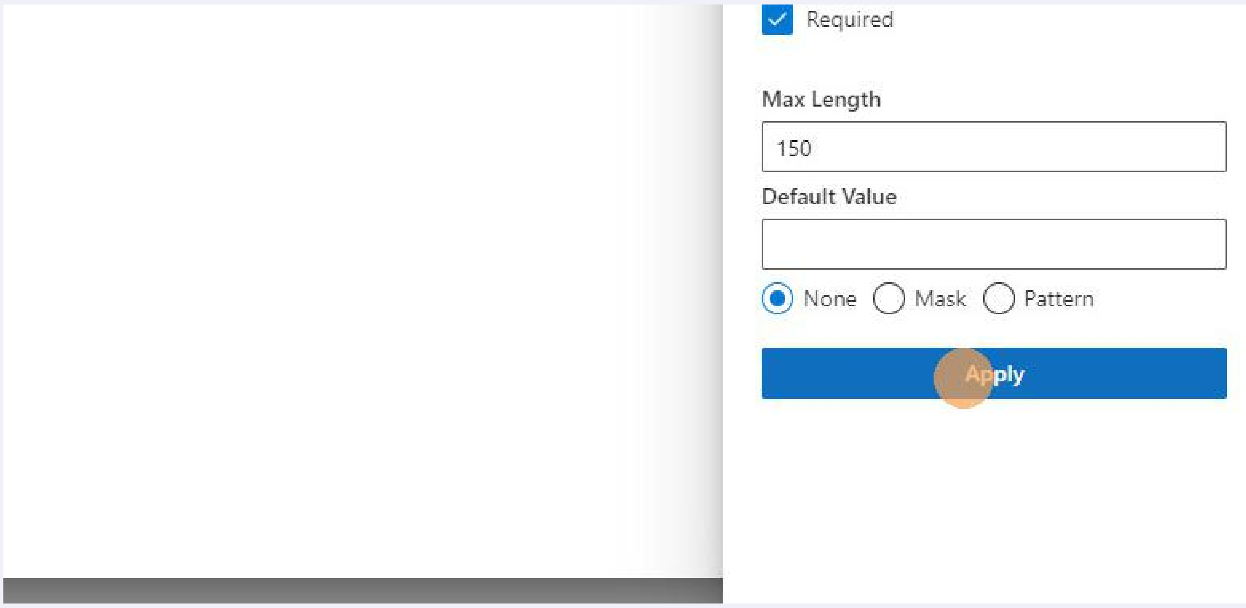
18 When you click on 'Field Type' you will be presented with the various options you can select. These control the information that a User can input into this field. We will explore some of these fields later in this step-by-step but for 'Counterparty Name' this is probably a 'Text Box' so that a User 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.



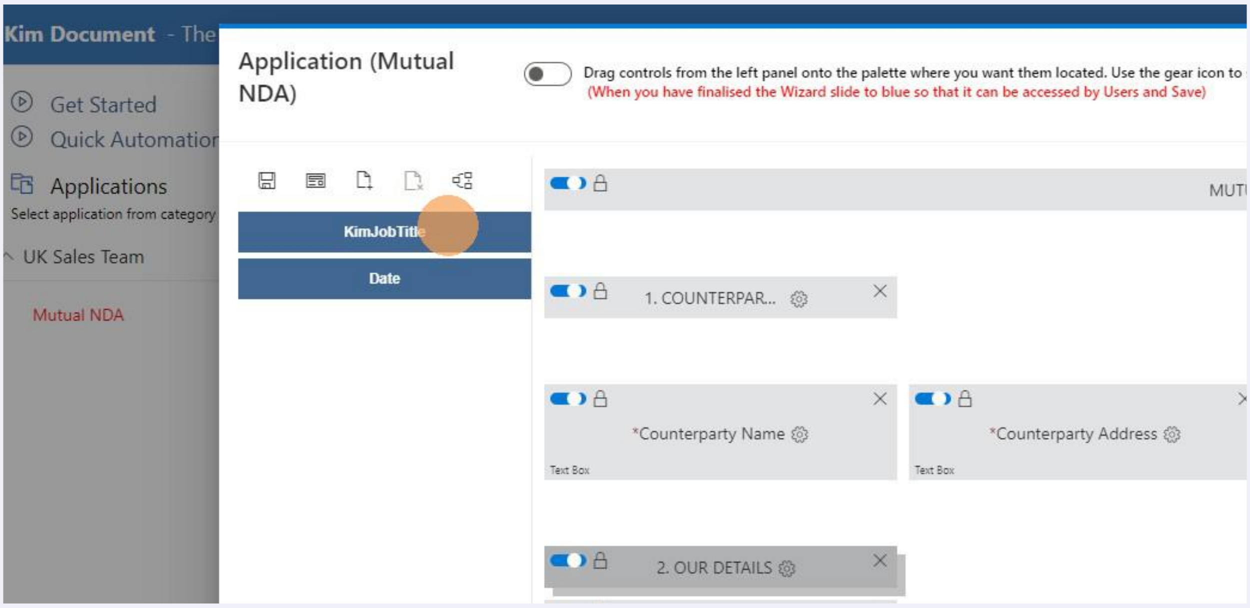
19 You can make fields in your form mandatory/required (i.e. a User has to answer this question and if they do not they cannot submit the form). To make a field mandatory simply tick the 'Required' field. TIP 6: Make sure that you only make fields mandatory / required that you know a User can answer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



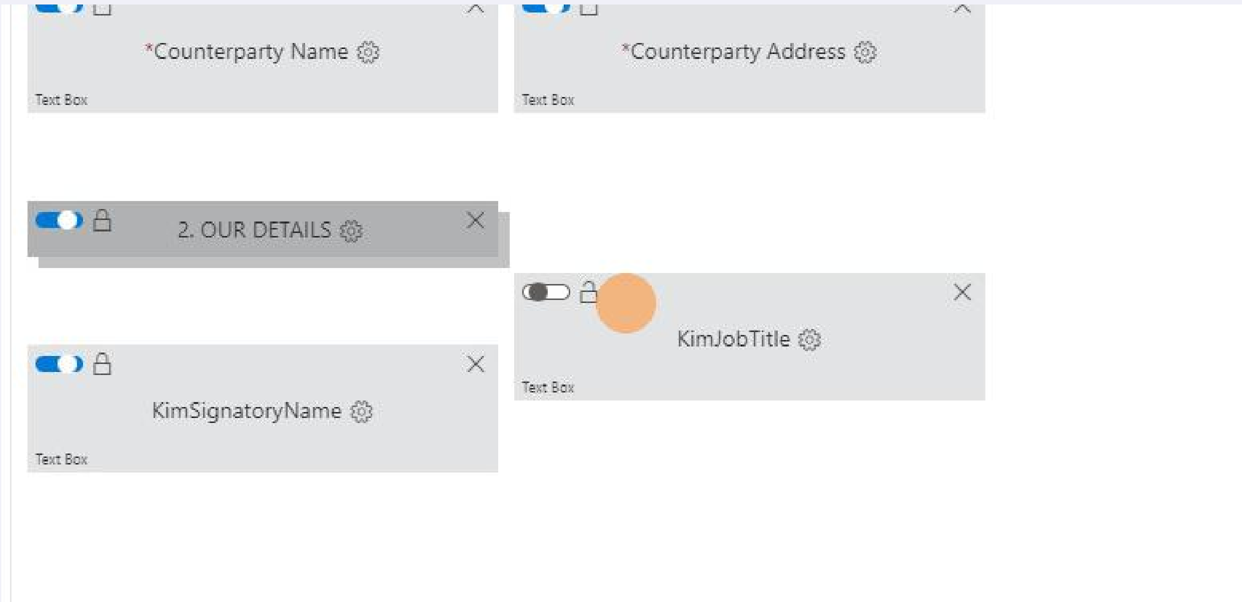
20 The 'Max Length' field allows you to control the number of characters a User can enter into a field. It is defaulted to 150 but you can make it less or more by simply changing the number. Once you have completed the dialog box select 'Apply'.



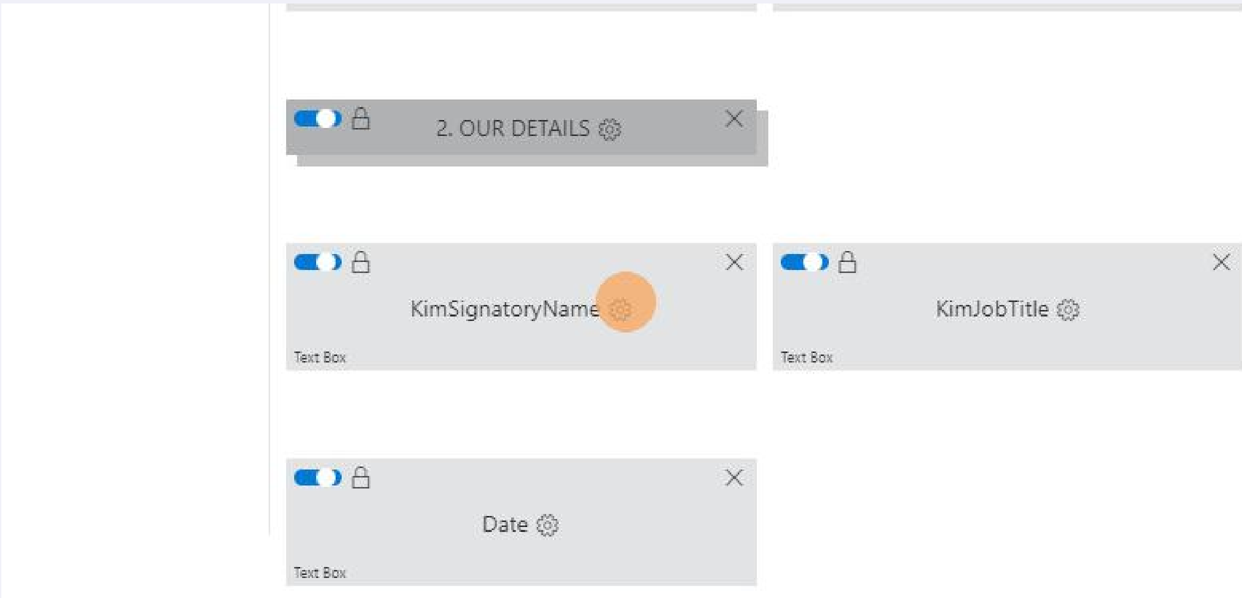
21 Having completed the Properties for the tags under section 1, drag and drop 'Add Section Header' to create a section 2 and then drag and drop the tags that sit under section 2.



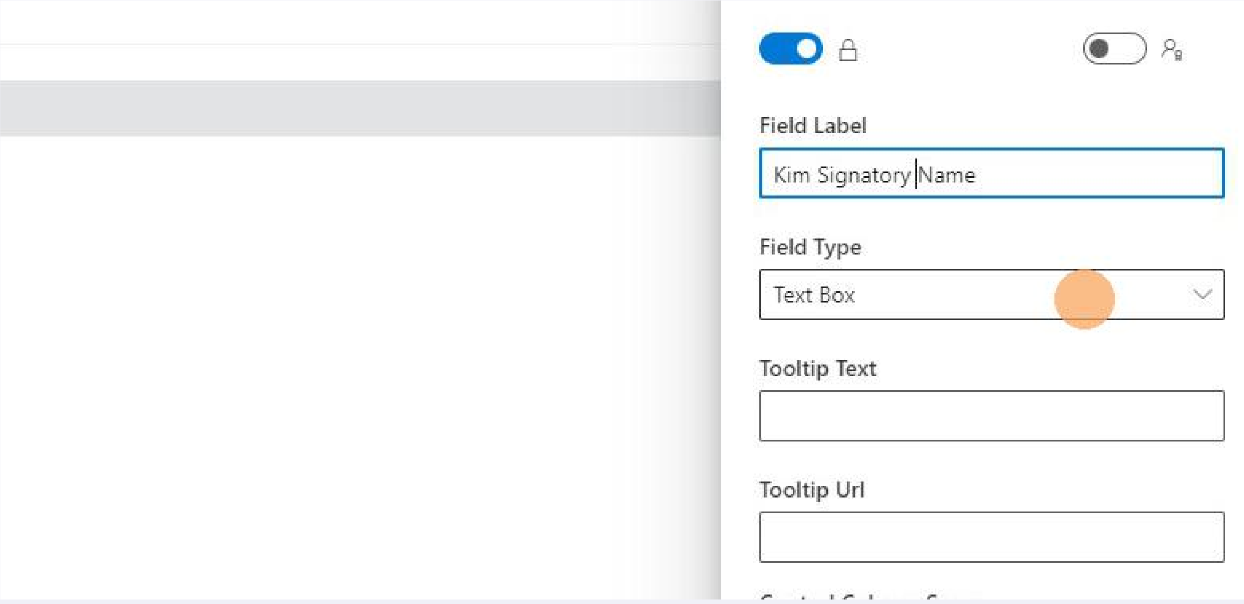
22 Remember you can preview your form layout at any time and move tags by unlocking them and then re-locking them when they are in your preferred position.



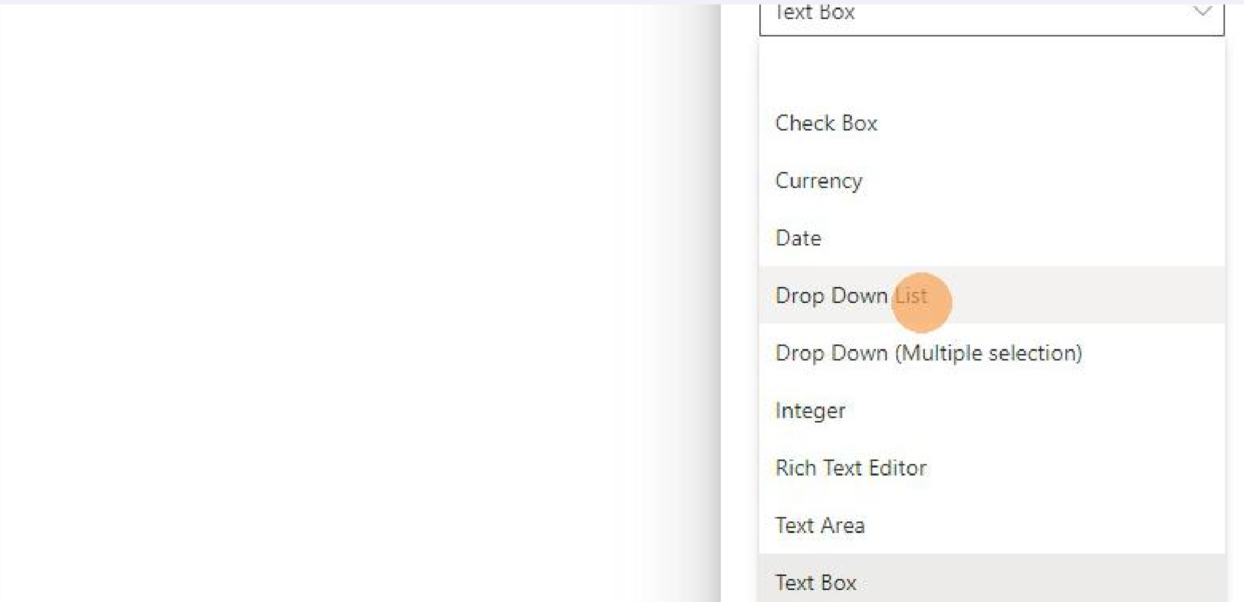
23 Select the cog on the tag you want to add properties to.



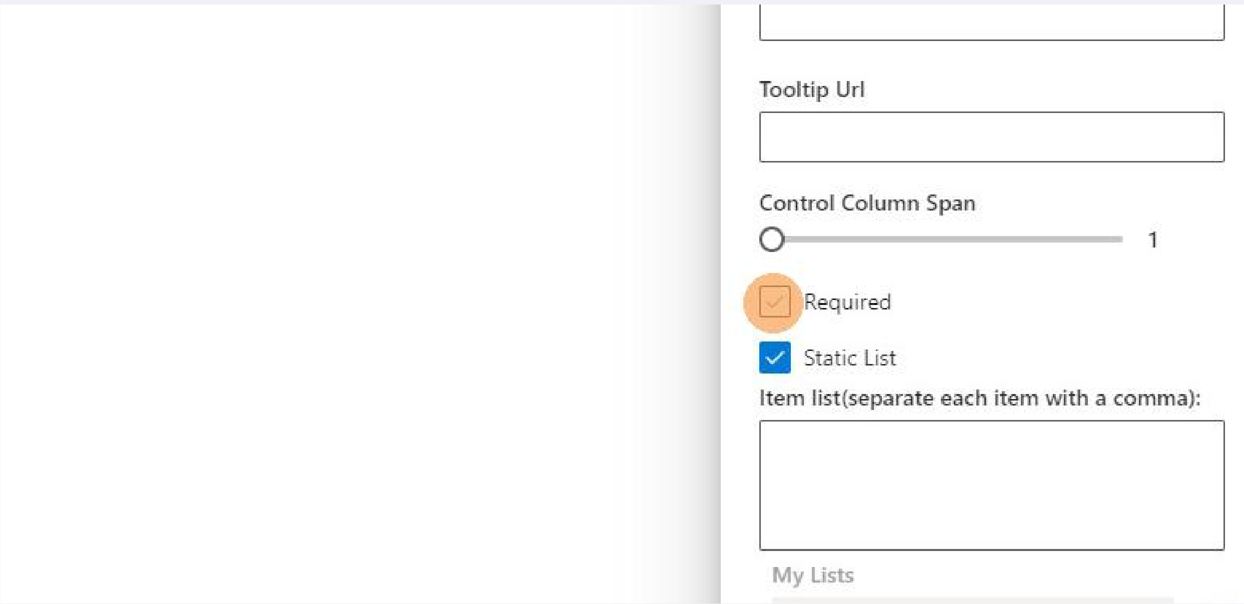
24 Change the 'Field Label' as required and select 'Field Type'



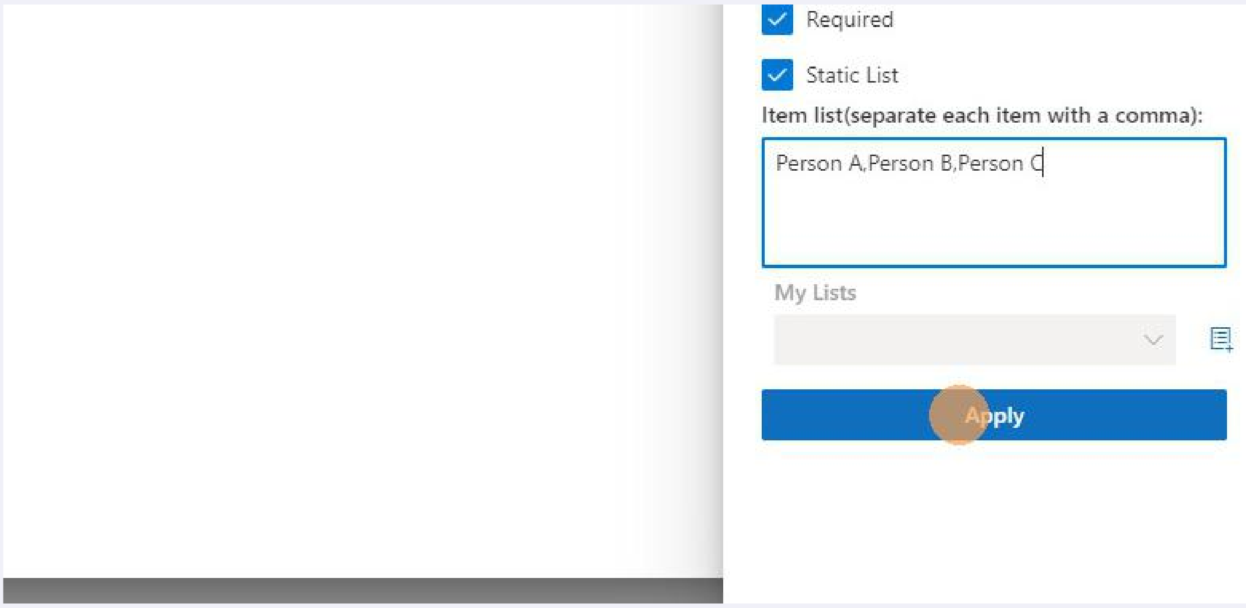
25 For this example select 'Drop Down List'.



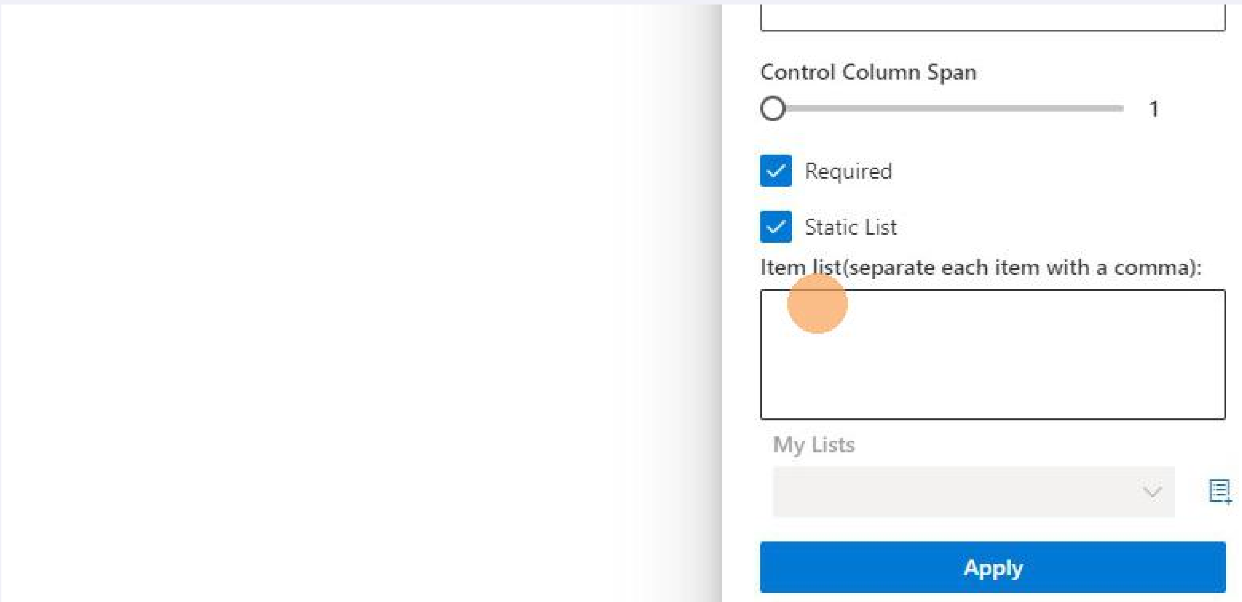
26 Make the field 'Required' if you want to.



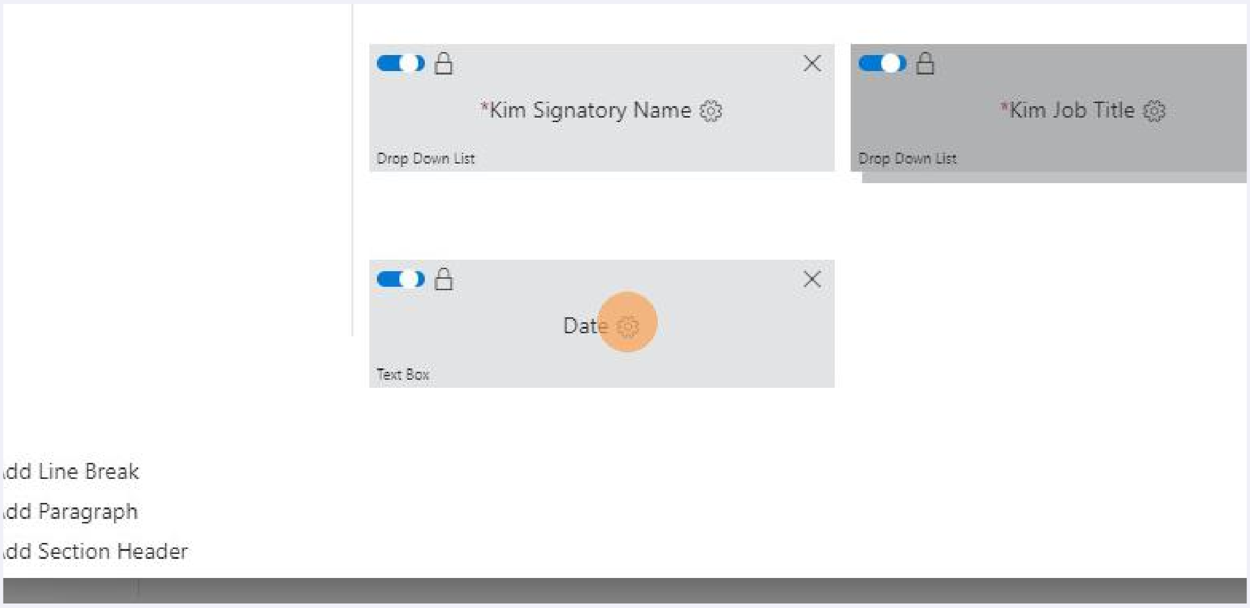
27 In the 'Item List' write in your drop down options. These are the options that a User will be able to select from. TIP 7: When typing in a drop down list type your items and only separate them by a comma (no spaces). For example - Red,Amber,Black Or Yes,No,Don't Know When you have written in your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



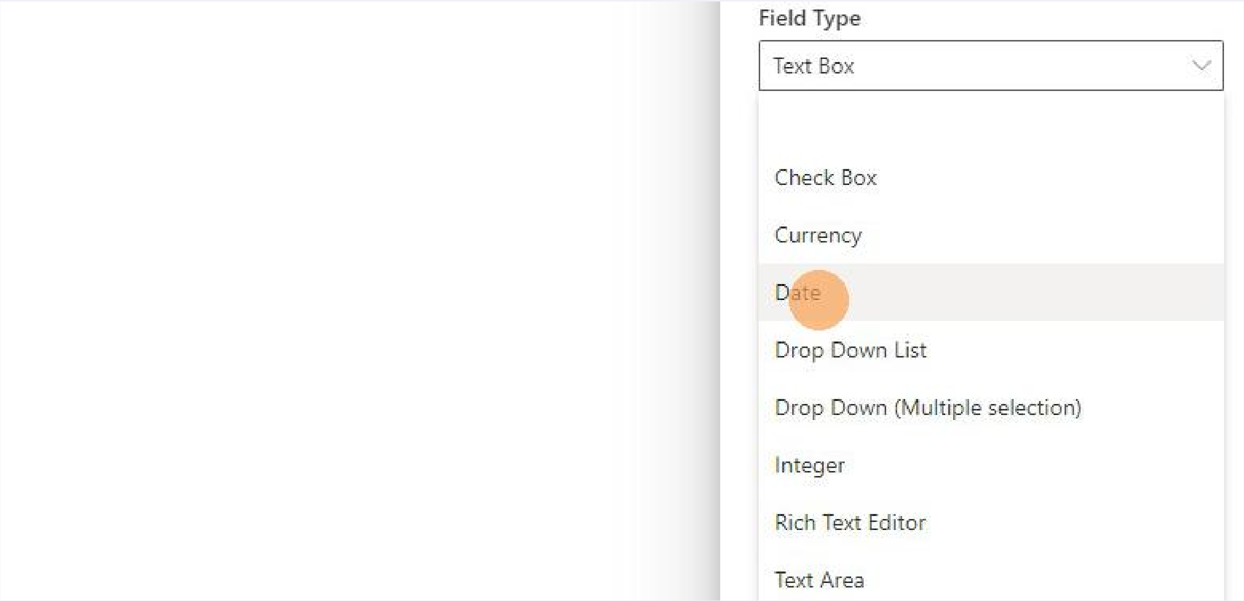
28 For long drop down lists, rather than type in the list you can upload it using the 'My Lists' feature. Simply untick 'Static List' and the 'My Lists' feature enables and you can use the xls icon to the right to upload a list.



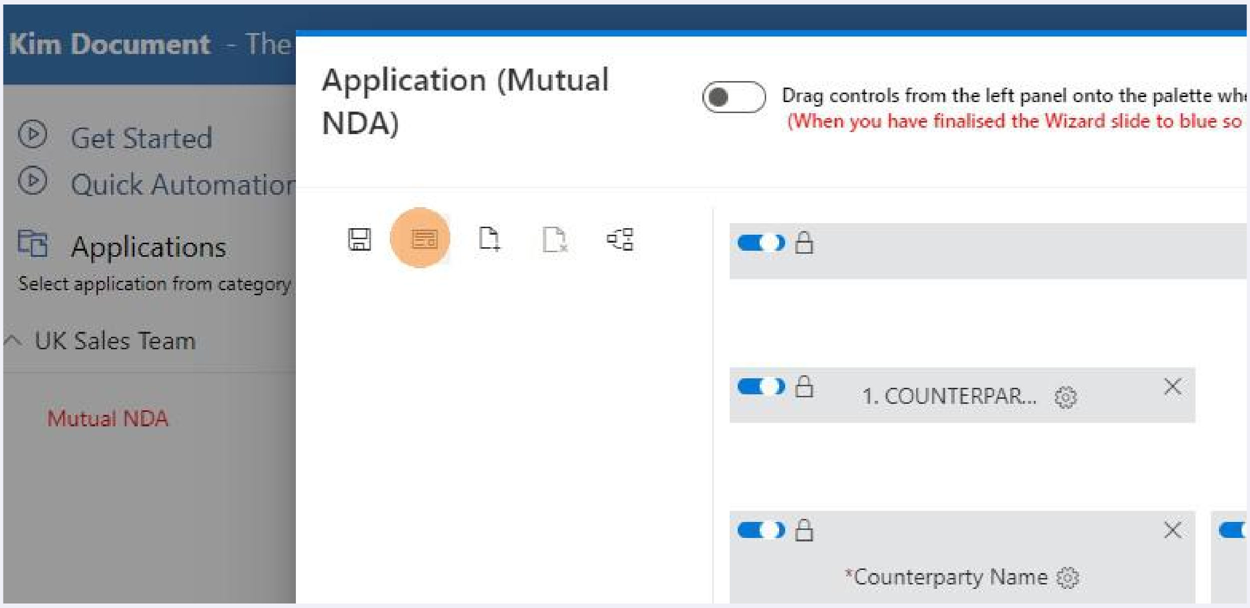
29 To apply dates simply select the cog in the relevant tag.



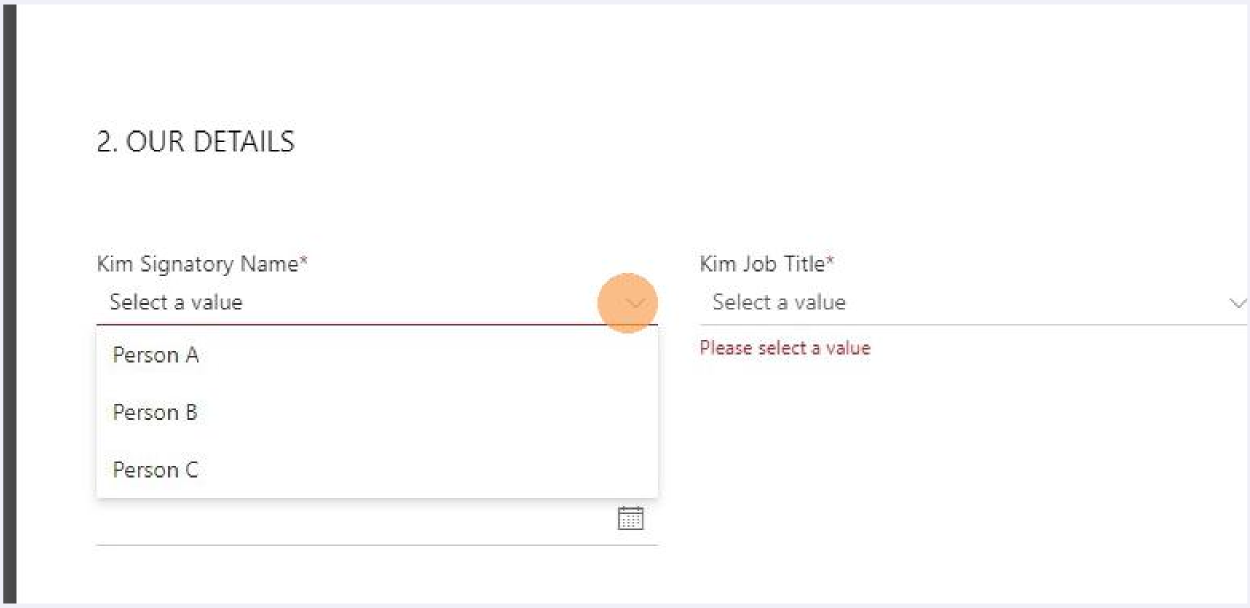
30 Select 'Date' from the 'field Type' menu and it will automatically apply.



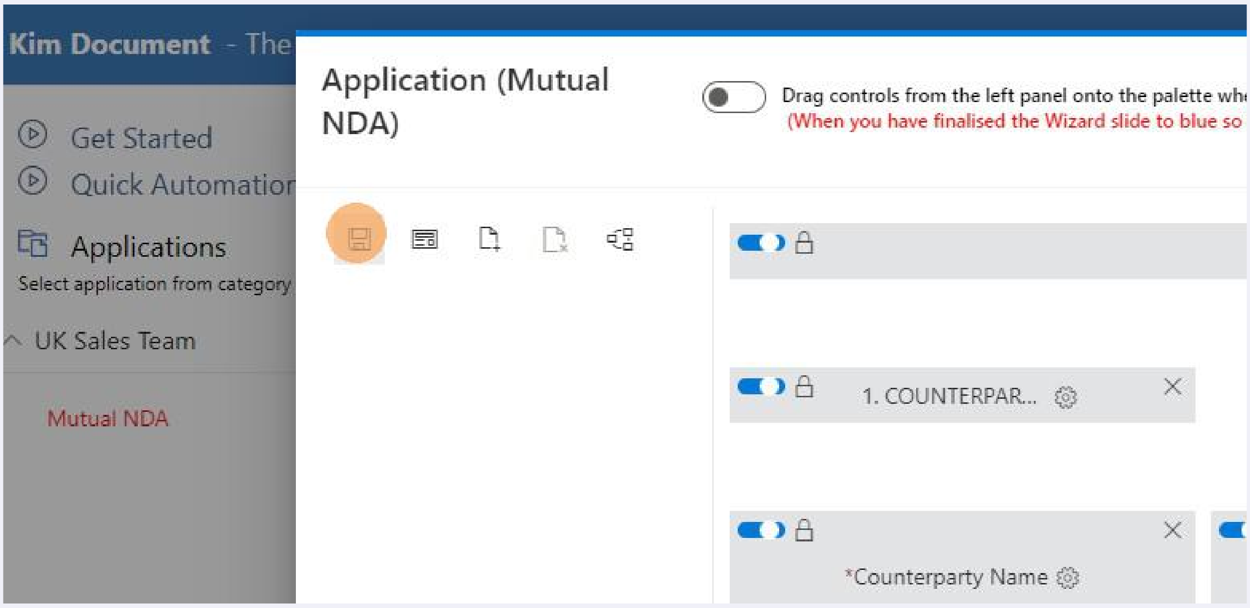
31 When you have added properties to all your tags preview the layout that a User will see be selecting the preview icon.



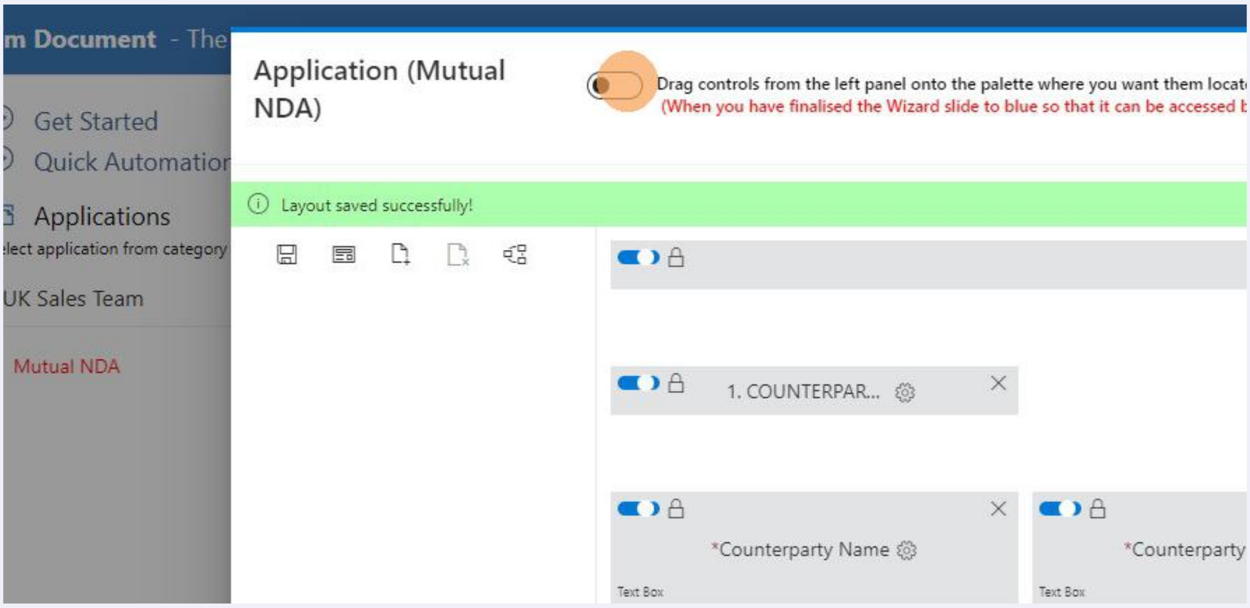
32 Check that you are happy with the layout and that your drop down fields have pulled through. Amend the layout by using the Wizard if you want to.



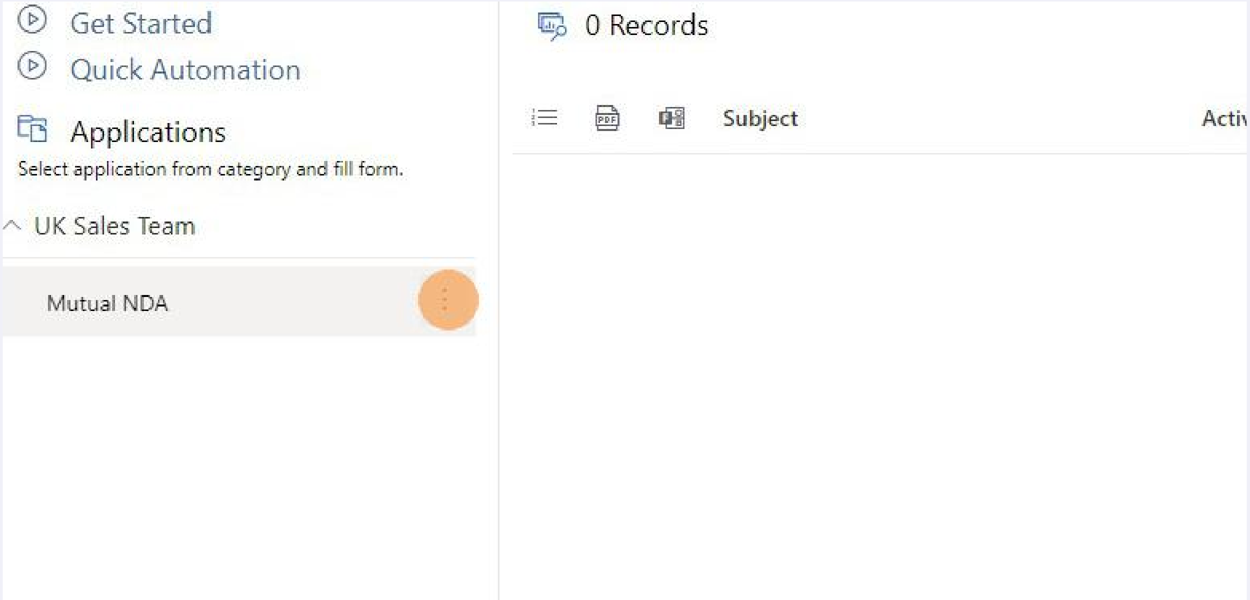
33 Exit preview and save the form. Note that in the left-hand greyed out menu the 'Mutual NDA' is in red (it is red because it has not been enabled for Use yet).



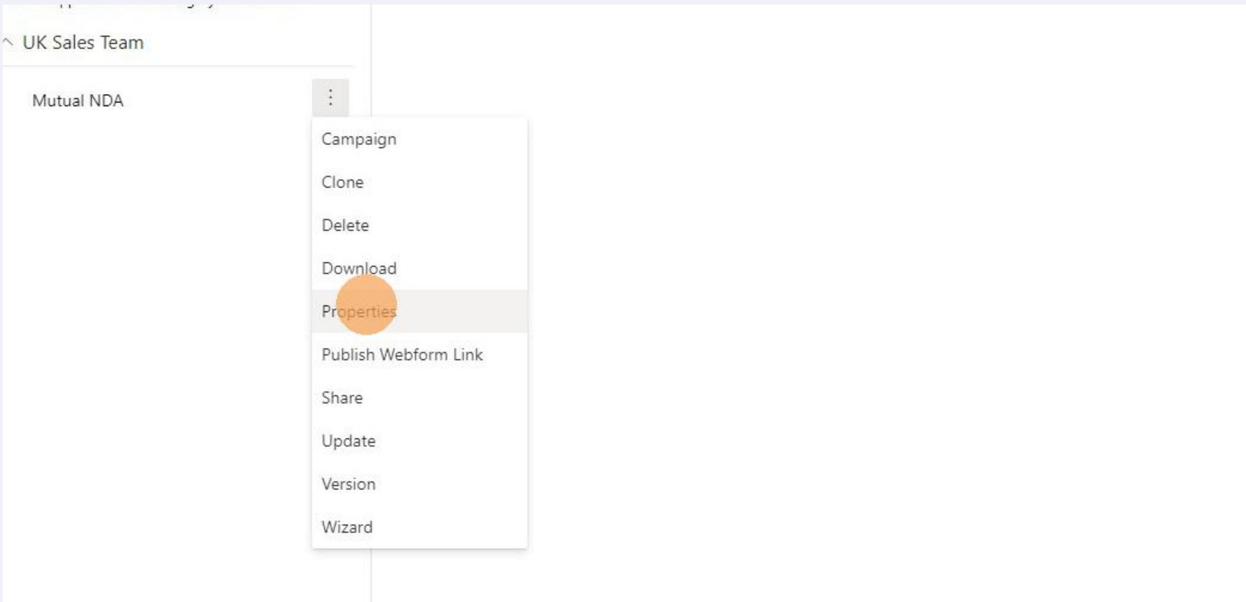
34 Having saved the form, turn the lock at the top of the screen to blue and save again. This will enable the Application form (see next screen where the red has turned to black)



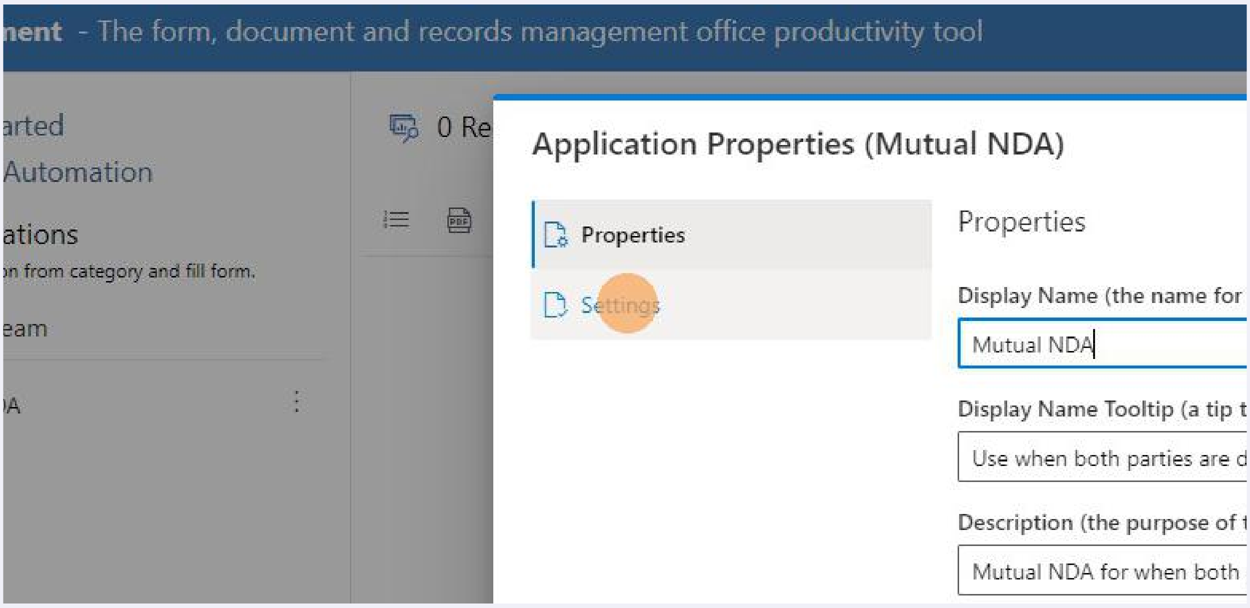
35 There is one final step to take before Users can start generating this document. Click on the three dots.



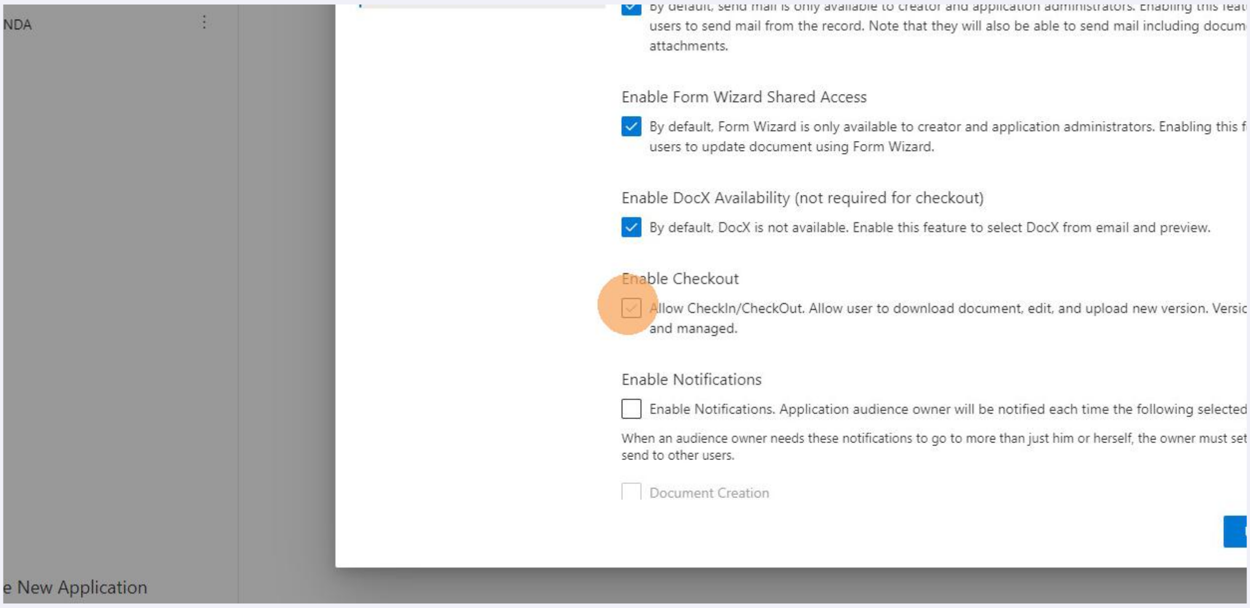
36 This provides you with your ability to take different actions from Campaigns (see 'How To Set Up and Run Campaigns') through ''Publish Webform Link' (see 'How To Make a Form Available In Your Existing Systems For Users To Complete') to re-opening the Wizard to make amendments. For now select 'Properties'.



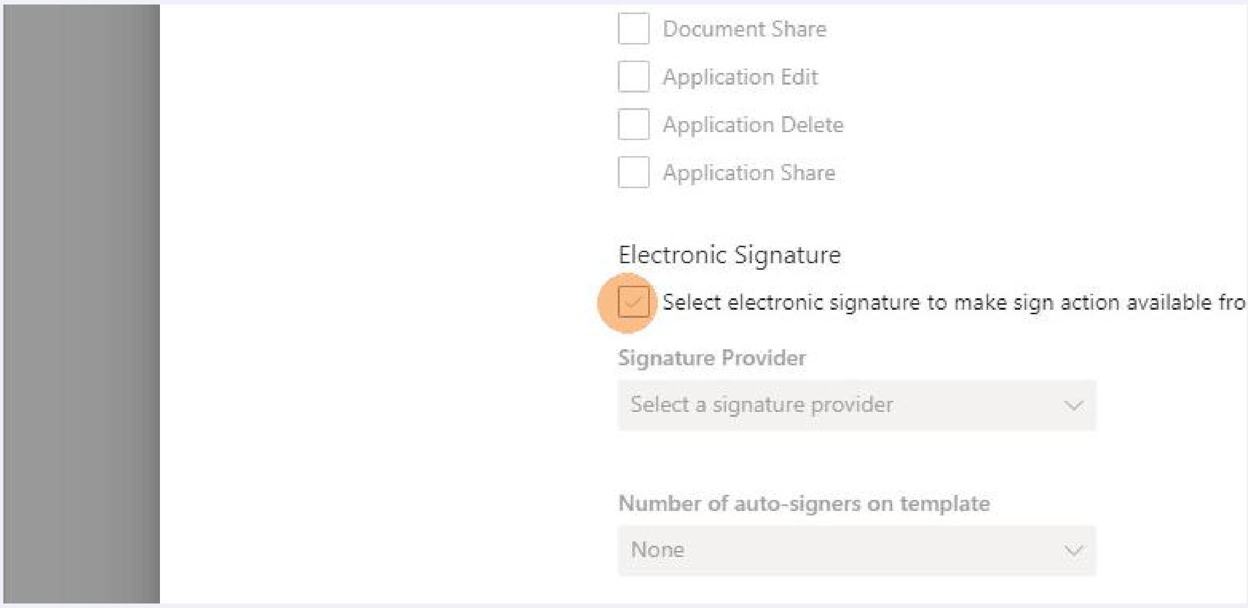
37 This allows you to add your existing properties but also enables various settings. Select 'Settings'



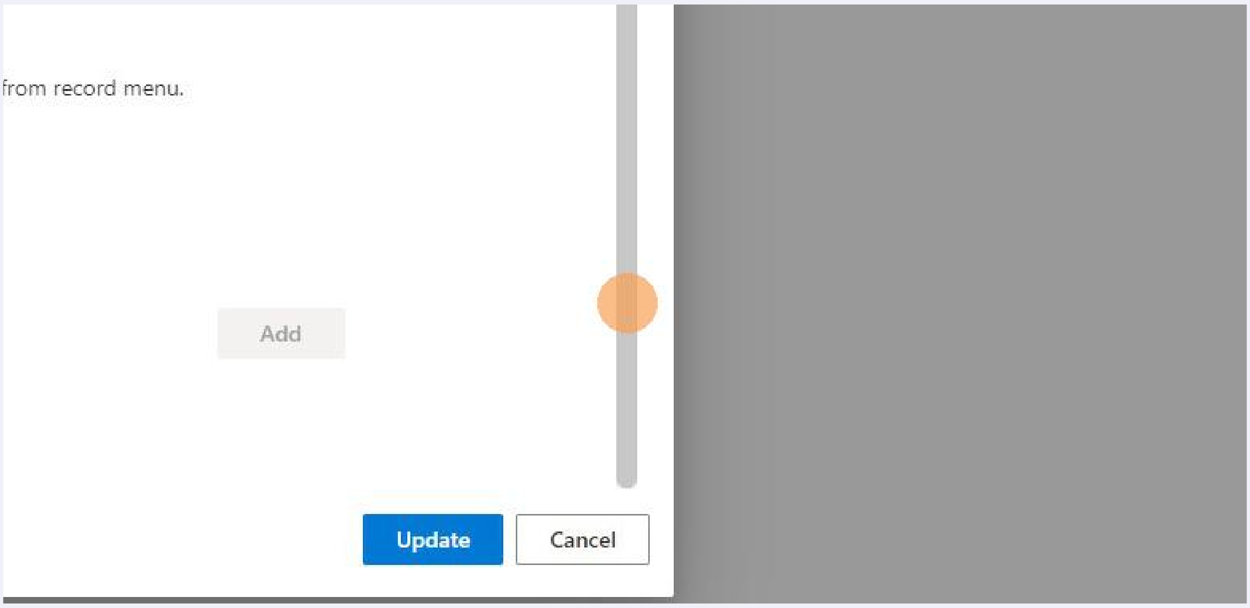
38 The various settings are self-explanatory. Tick the boxes that you want for this document. This will, for example, allow Users to send this document as email, or Share the document with a colleague or third party, have a Word and/or pdf version of the document, check-out and amend a document ...



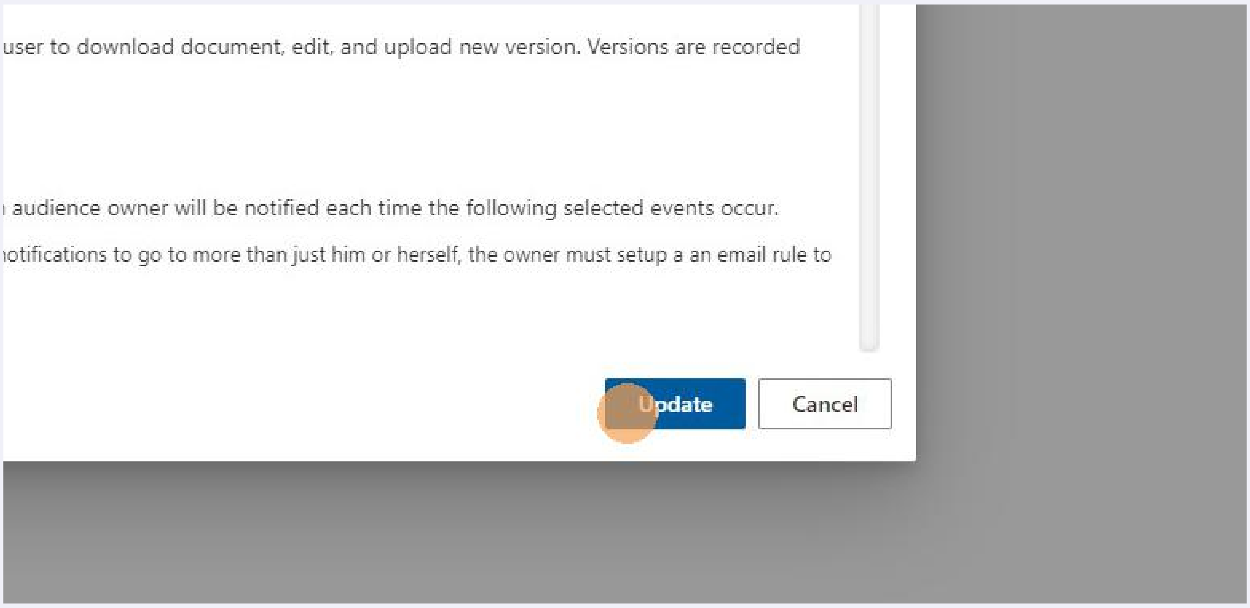
39 If appropriate you can also enable eSignature



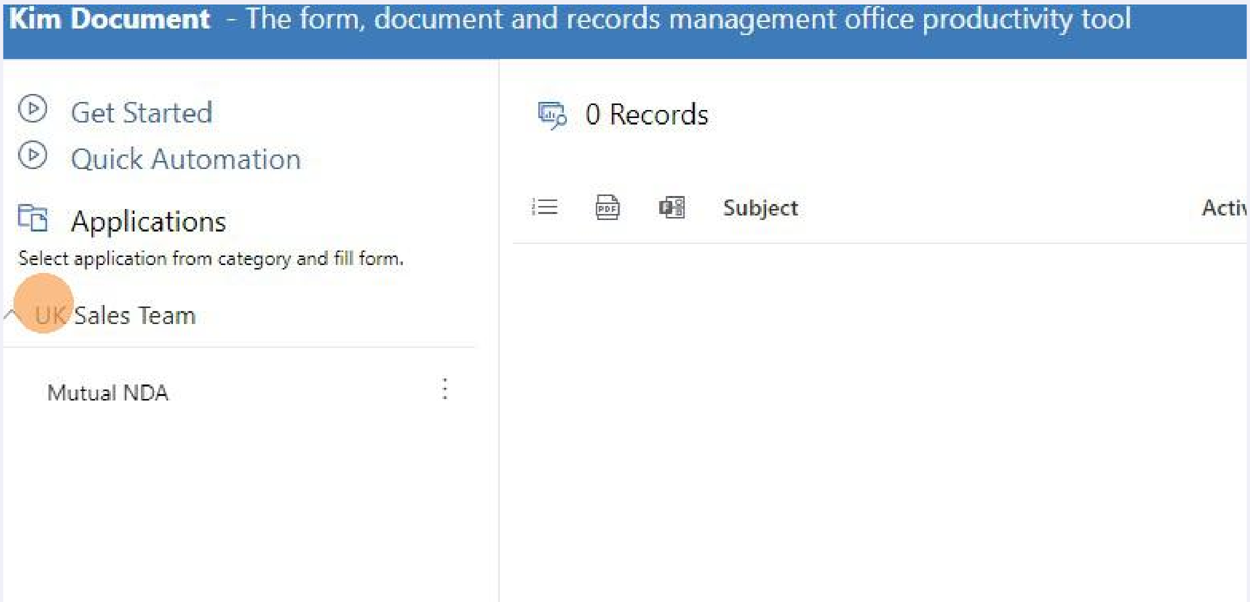
40 Click here.



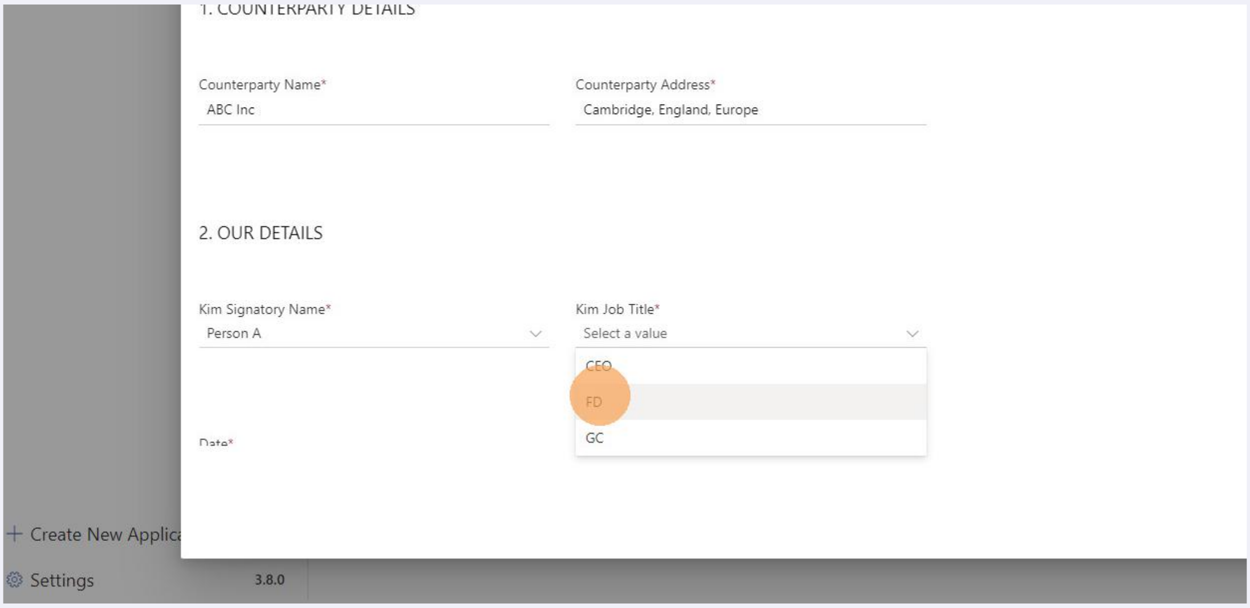
41 When finished, 'Update' your settings for this document.



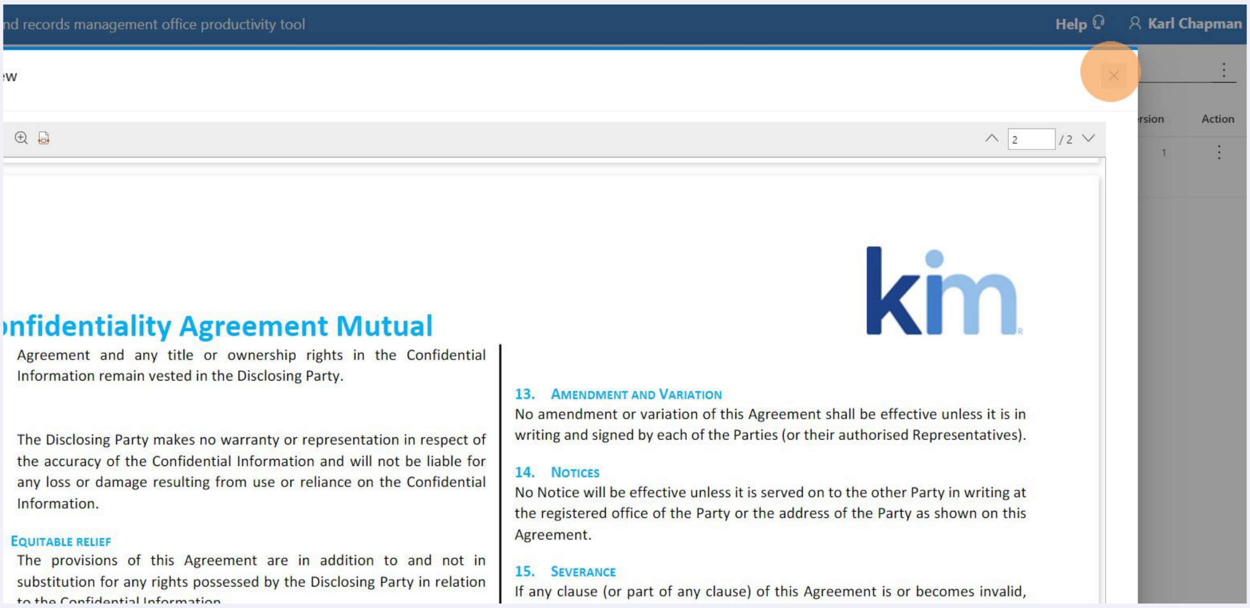
42 Now, when a member of the 'UK Sales Team' accesses Kim they will be able to select 'Mutual NDA' from the left-hand menu.



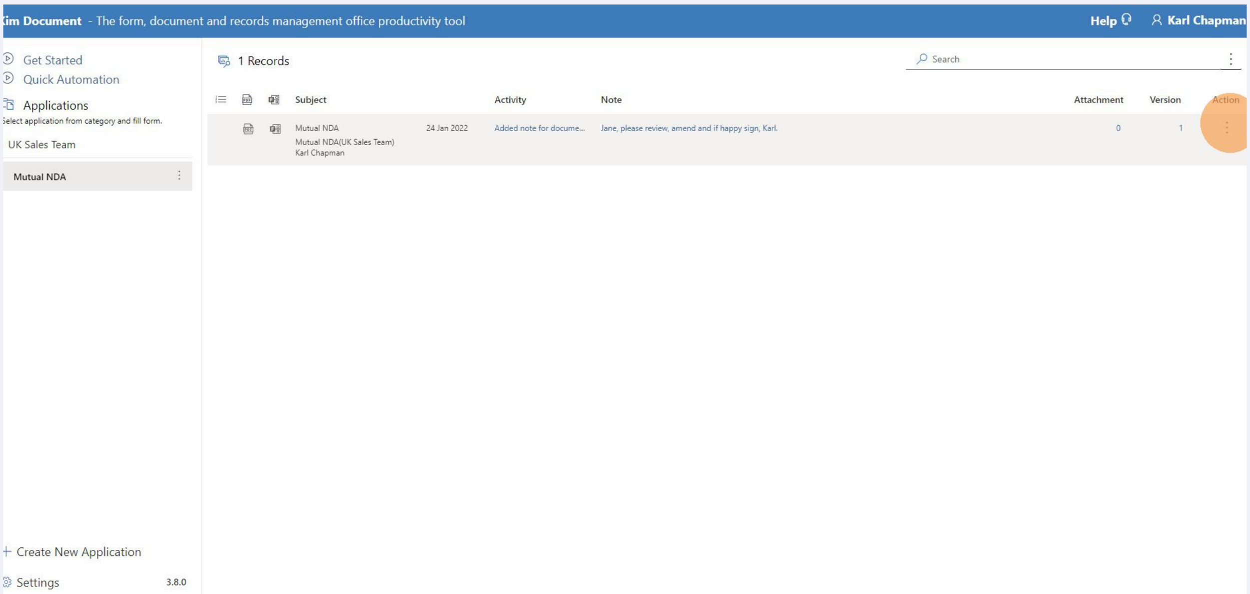
43 When they select 'Mutual NDA' the form will appear for them to complete and 'Submit'



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!