



Six Collaboration Methods in Kim Document

MS Teams, Email, Share, Send Link, Campaigns, Publish Webform Link

May 2022

Available from your browser or MS Teams

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Business need

Whatever the letter, form, checklist, compliance record or contract we have automated, we want a tool that allows us to collaborate internally and/or externally. Managing all the records, versions and data extraction/analysis in one place. We want a tool that can:

- send documents via **email**;
- **share** the document and allow editing and version control;
- be sent as a **web link** so that a recipient simply completes the form and submits it;
- be used as **campaign** and sent to multiple recipients at the same time, managing the responses;
- create a **published webform link** (URL) that can be embedded on our internal systems or publicly facing websites for Users to access and complete; and that
- we can use seamlessly in **MS Teams**

Welcome to Kim Document!

Seamless in MS Teams



This is Kim Document accessed via your browser

Kim Document - The form, document and records management office productivity tool Help Karl Chapman

7 Records Search

Subject	Activity	Note	Attachment	Version	Action
On-Boarding Checklist On-Boarding Checklist(Compliance)	25 May 2022 Reviewed		0	1	
Cost of Living Estimate Form Cost of Living Estimate Form(Compliance)...	14 Apr 2022 Added note for docume...	Sarah, test ...	0	1	
Annual Compliance Record Data Protection & InfoSec(Compliance)	7 Dec 2021 Reviewed	Complete response received	0	1	
CS Weekly Report Weekly Report(Small/Mid Businesses) Karl Chapman	16 Nov 2021 Reviewed	Please see weekly report for 7 March 2021	0	2	
SRA AML Declaration AML Declaration(Regulators) Karl Chapman	15 Nov 2021 Reviewed	Thank you for your response. This file is now closed until the next review.	2	1	
LifeArc Order Form Order Form - Services(Legal) Karl Chapman	28 Oct 2021 Reviewed	Please review, amend and return. Please sign if you have no amendments	0	9	
Quarterly Pension Fund Complian... Pension Fund Compliance(Compliance) Karl Chapman	7 Oct 2021 Reviewed	Please find the quarterly compliance assessment please complete ...	0	2	

+ Create New Application

Settings 3.12.0

Seamless in MS Teams



This is Kim Document in MS Teams

You have all Kim Document's functionality without leaving MS Teams

The screenshot shows the Kim Document application interface within an MS Teams workspace. The interface is divided into a sidebar on the left and a main content area on the right.

Sidebar:

- Activity (1 notification)
- Chat (37 notifications)
- Teams
- Calendar
- Calls
- Files
- kim Kim Docu...
- ...
- Apps
- Help

Main Content Area:

Search bar: Search

kim Kim Document (US) Workspace Your Activity Help About

7 Records

Select application from category and fill form.

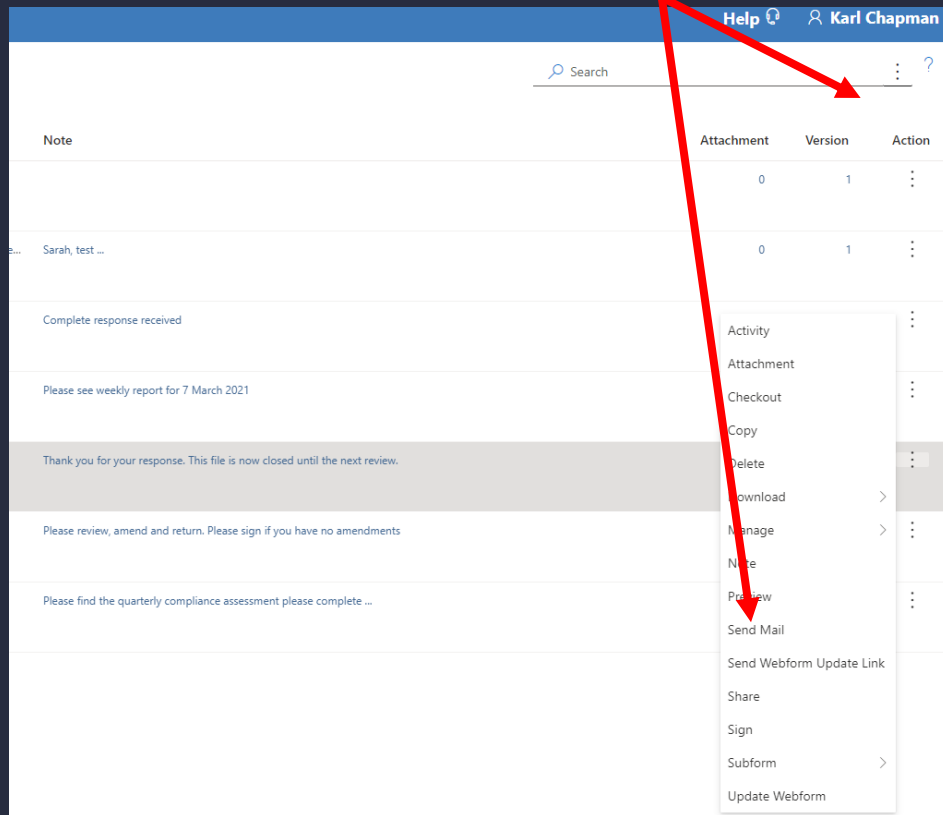
Subject	Activity	Note	Attachment	Version	Action
On-Boarding Checklist On-Boarding Checklist(Compliance)	25 May 2022 Previewed		0	1	⋮
Cost of Living Estimate Form Cost of Living Estimate Form(Compliance)...	14 Apr 2022 Added note for docume...	Sarah, test ...	0	1	⋮
Annual Compliance Record Data Protection & InfoSec(Compliance)	7 Dec 2021 Previewed	Complete response received	0	1	⋮
CS Weekly Report Weekly Report(Small/Mid Businesses) Karl Chapman	16 Nov 2021 Previewed	Please see weekly report for 7 March 2021	0	2	⋮
SRA AML Declaration AML Declaration(Regulators) Karl Chapman	15 Nov 2021 Previewed	Thank you for your response. This file is now closed until the next review.	2	1	⋮
LifeArc Order Form Order Form - Services(Legal) Karl Chapman	28 Oct 2021 Previewed	Please review, amend and return. Please sign if you have no amendments	0	9	⋮
Quarterly Pension Fund Complian... Pension Fund Compliance(Compliance) Karl Chapman	7 Oct 2021 Previewed	Please find the quarterly compliance assessment please complete ...	0	2	⋮

+ Create New Application

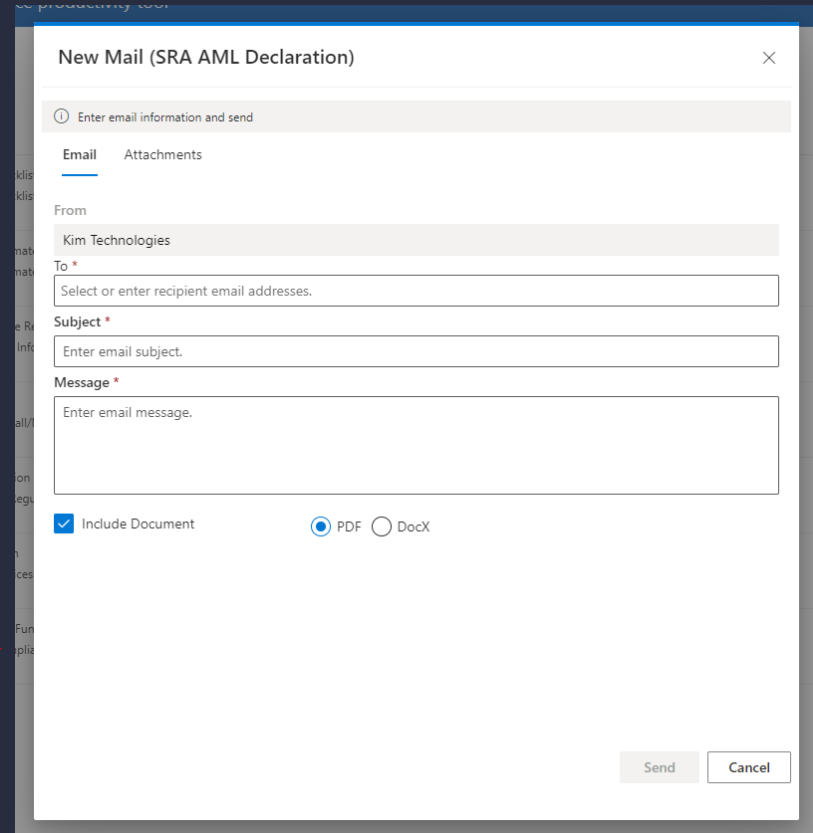
Settings 3.12.0

Email

1. Having created a document you want to 'Email', simply select 'Action', 'Send Mail'



2. Add recipient details and the format of the document you want and 'Send'. You are finished.



Share

Rather than email the document you want to 'Share' it with a recipient so that they can review, amend and/or sign it. Select the document you want to share' and simply select 'Action', 'Share' and add the recipients email address

The image shows two screenshots from the Kim document management system. The left screenshot displays a document list with columns for 'Note', 'Attachment', 'Version', and 'Action'. A context menu is open over the 'Action' column, with 'Share' highlighted. The right screenshot shows a 'Share Record (SRA AML Declaration)' dialog box. Inside this dialog, a 'New User' sub-dialog is open, prompting for an 'Email' address with the text 'Enter new user's email address.' and buttons for 'Send' and 'Cancel'. Red arrows indicate the flow from the 'Share' option in the left screenshot to the 'New User' dialog in the right screenshot.

Share



The recipient receives the email and validates the link and, without downloading any software, is presented with the Kim Document screen with only their record in it. They then have a series of different actions – preview, checkout (and check in), sign ... - enabling full collaboration and version control. When a User responds it automatically updates both instances. Collaborating via 'Share'.

The screenshot shows the Kim Document web application interface. The top navigation bar includes the title "Kim Document - The form, document and records management office productivity tool", a "Help" icon, and a user profile icon. The left sidebar contains navigation options: "Get Started", "Quick Automation", and "Applications" (with a sub-note "Select application from category and fill form."). The main content area displays "7 Records" and a search bar. A table lists records with columns for Subject, Activity, Note, Attachment, and Version. One record is visible: "SRA AML Declaration AML Declaration(Regulators) Karl Chapman" dated "15 Nov 2021" with the activity "Previewed" and a note "Thank you for your response. This file is now closed until the next review." A context menu is open over this record, listing actions such as "Activity", "Attachment", "Checkout", "Copy", "Delete", "Download", "Manage", "Note", "Preview", "Send Mail", "Send Webform Update Link", "Share", "Sign", "Subform", and "Update Webform". A red arrow points from the text "Collaborating via 'Share'" to the "Share" option in the menu.

Subject	Activity	Note	Attachment	Vers
SRA AML Declaration AML Declaration(Regulators) Karl Chapman	15 Nov 2021 Previewed	Thank you for your response. This file is now closed until the next review.	0	

Web Link



Rather than 'Email' or 'Share' you want to simply capture some information from an internal or external party. So, having created the document (or using one you have already created) just send them a 'Web Link' to access and complete the form:

1. Select 'Action', 'Send Webform Update Link'

Note	Attachment	Version	Action
	0	1	⋮
Sara	0	1	⋮
Com			⋮
Please see weekly report for 7 March 2021			⋮
Thank you for your response. This file is now closed until the next review.			⋮
Please review, amend and return. Please sign if you have no amendments			⋮
Please find the quarterly compliance assessment please complete ...			⋮

- Activity
- Attachment
- Checkout
- Copy
- Delete
- Download
- Manage
- Note
- Preview
- Send Mail
- Send Webform Update Link
- Share
- Sign
- Subform
- Update Webform



2. Enter the email of the recipient and send

Send Webform Update Link (On-Boarding Checklist)

Enter Recipient Email Address to Send Link *

Enter email address.

Send Cancel

3. The recipient clicks the link, accesses the form, completes and submits and the response appears in your Kim Document screen

Kim Technologies Compliance Record

This is an important record for you to complete. Once completed you will receive an email confirmation of receipt and a copy of your response for your records. A copy of this record will be retained by the Company to demonstrate its compliance with its legal and regulatory obligations.

Your Name* Date of Compliance Program You Attended*

DECLARATION: I Confirm I attended the Annual Data Protection & Information Security Training Course*

DECLARATION: I understand my obligations and the company requirements in order to comply with the following:

UK Data Protection Act / EU GDPR* Data Classification Policy* Clear Desk Clear Screen Polic

Submit Cancel

Campaign

Rather than 'email', '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'

The screenshot displays the 'Kim Document' application interface. The top navigation bar includes 'Help' and the user name 'Karl Chapman'. The main content area shows a table of records with columns for Subject, Activity, Note, Attachment, Version, and Action. A context menu is open over the 'Cost of Living Estimate Form' record, with the 'Campaign' option highlighted. A red arrow points from the text above to the 'Campaign' option in the menu.

Subject	Activity	Note	Attachment	Version	Action
Mutual NDA NDA Mutual(Legal) Karl Chapman	25 May 2022 Added note for docume...	Sian, please review ...	0	1	⋮
On-Boarding Checklist On-Boarding Checklist(Compliance) Sarah Sheehan	25 May 2022 Previewed		0	1	⋮
Cost of Living Estimate Form Cost of Living Estimate Form(Compliance) Arianne Mason	14 Apr 2022 Added note for docume...	Sarah, test ...	0	1	⋮
Annual Compliance Record Data Protection & InfoSec(Compliance) Aqualine Aquino	7 Dec 2021 Previewed	Complete response received	0	1	⋮
Weekly Report Weekly Report(Small/Mid Businesses) Karl Chapman	16 Nov 2021 Previewed	Please see weekly report for 7 March 2021	0	2	⋮
SRA AML Declaration AML Declaration(Regulators) Karl Chapman	15 Nov 2021 Previewed	Thank you for your response. This file is now closed until the next review.	2	1	⋮
LifeArc Order Form Order Form - Services(Legal) Karl Chapman	28 Oct 2021 Previewed	Please review, amend and return. Please sign if you have no amendments	0	9	⋮
Quarterly Pension Fund Complian... Pension Fund Compliance(Compliance) Karl Chapman	7 Oct 2021 Previewed	Please find the quarterly compliance assessment please complete ...	0	2	⋮

Campaign

Select '+ New Campaign'

Add campaign details

Campaign List

[+ New Campaign](#)

Name	Description	Begin Date	End Date
Campaign Example for Cu...	Example to share with potential ...	5 Feb 2022	31 Dec
Annual DPA & InfoSec 2021	Annual Data Protection and Info...	7 Dec 2021	14 Dec

Edit Campaign

Please activate this campaign by (i) ticking the box and (ii) selecting 'Update Campaign' at the bottom

Campaign Name *
Annual DPA & InfoSec 2021

Campaign Description *
Annual Data Protection and Information Security Training

Campaign Email Owner *
karl.chapman@kimtechnologies.com

Campaign Start Date (Optional)
7 December 2021

Campaign End Date (Optional)
14 December 2021

Return URL (Optional - see tooltip for more information)
https:// www.kimdocument.com

Initial Email Subject *
Kim Annual DPA & InfoSec Training 2021

Initial Email Body (Important - Do not remove [\$tags])* Default Email

B I U S " ☰ ☷ 🔗 ⌘ Normal

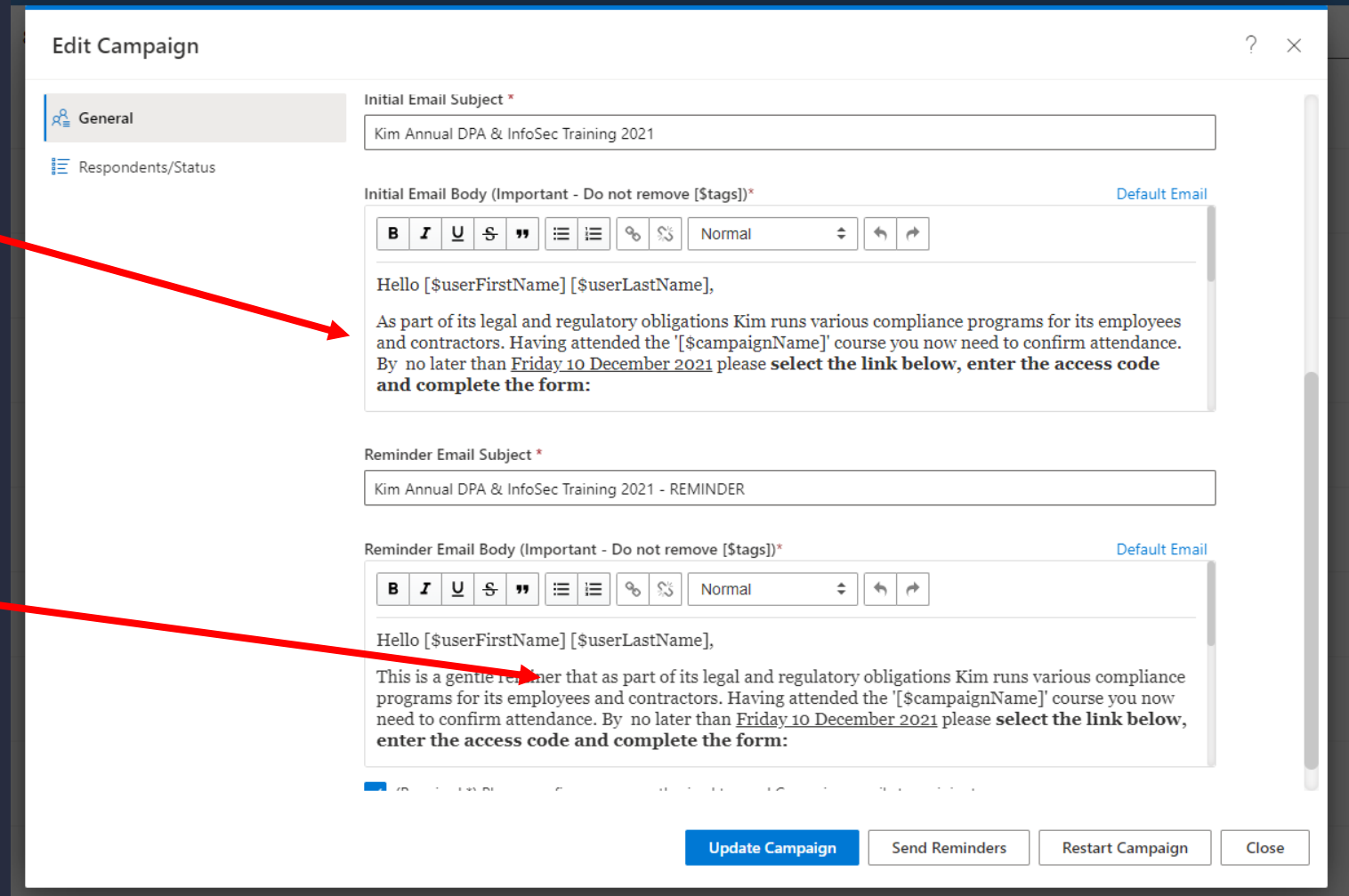
Hello [\$userFirstName] [\$userLastName],

[Update Campaign](#) [Send Reminders](#) [Restart Campaign](#) [Close](#)

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



The screenshot shows the 'Edit Campaign' window with two email configuration sections. The first section is for the 'Initial Email Subject' and 'Initial Email Body'. The subject is 'Kim Annual DPA & InfoSec Training 2021'. The body text is: 'Hello [UserFirstName] [UserLastName],
As part of its legal and regulatory obligations Kim runs various compliance programs for its employees and contractors. Having attended the '[CampaignName]' 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:**' A red arrow points from the text on the left to the body text in this section. The second section is for the 'Reminder Email Subject' and 'Reminder Email Body'. The subject is 'Kim Annual DPA & InfoSec Training 2021 - REMINDER'. The body text is: 'Hello [UserFirstName] [UserLastName],
This is a gentle reminder that as part of its legal and regulatory obligations Kim runs various compliance programs for its employees and contractors. Having attended the '[CampaignName]' 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:**' A red arrow points from the text on the left to the body text in this section. At the bottom of the window are buttons for 'Update Campaign', 'Send Reminders', 'Restart Campaign', and 'Close'.

Campaign



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

Send Campaign!

The screenshot displays the 'Edit Campaign' interface. At the top, there are navigation options: 'General', 'Upload User List', 'Add User', and 'Delete Respondents'. The 'Respondents' tab is active, showing a table of recipients. A modal dialog titled 'Upload Respondent List' is open, providing instructions and a file upload option.

Upload Respondent List

Example list

- The moment you Upload a User List or Add Users they will immediately receive an email to participate in the Campaign so please make sure that you have taken all other actions before completing this step
- Lists are limited to 2000 rows.
- Lists must be a CSV text file.
- Lists must be maximum size 500 KB.
- Lists must be in our specified format. Click link for example.
- Phone numbers are optional.

Choose File

Upload

Name	Phone	Date Sent	Action
gaurav.balyan@kimtec	Gaurav Baylan	8 Dec 2021 14:31	7 Dec 2021 20:03
hitam.yadav@kimtech	Hitam Yadav	10 Dec 2021 15:51	7 Dec 2021 20:03

previous 1 2 3 next

Campaign



Kim Annual DPA & InfoSec Training 2021



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

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

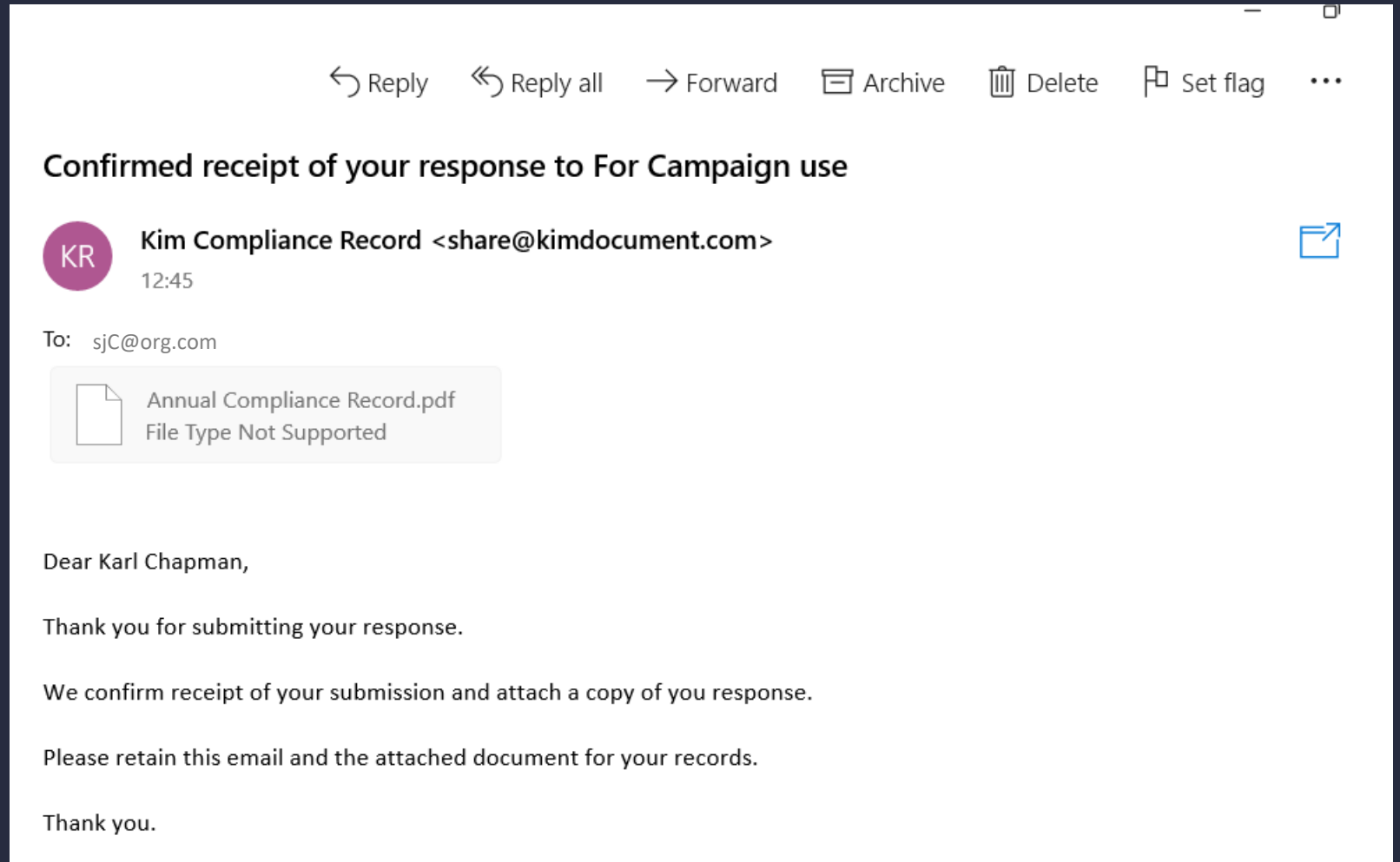
Fields can be made mandatory (*) or optional

The screenshot shows a web form titled "Data Protection & InfoSec" with a description of "Annual Compliance Record". The main heading is "Kim Technologies Compliance Record". A blue informational message states: "This is an important record for you to complete. Once completed you will receive an email confirmation of receipt and a copy of your response for your records. A copy of this record will be retained by the Company to demonstrate its compliance with its legal and regulatory obligations." The form includes two input fields: "Your Name*" and "Date of Compliance Program You Attended*" (with a calendar icon). Below these is a dropdown menu for the declaration: "DECLARATION: I Confirm I attended the Annual Data Protection & Information Security Training Course*" with a "Please select a value" error message. Further down is another declaration: "DECLARATION: I understand my obligations and the company requirements in order to comply with the following:". This is followed by four dropdown menus for policy acknowledgments: "UK Data Protection Act / EU GDPR*", "Data Classification Policy*", "Clear Desk Clear Screen Policy*", and "Acceptable Use Policy*", each with a "Select a value" error message. At the bottom right are "Submit" and "Cancel" buttons.

Campaign



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



Campaign



Analyze Results
All recipient responses come back into Kim

Full version control is automatically managed

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

Help Karl Chapman

9 Records

Subject	Activity	Note	Attachment	Version	Action
Annual Compliance Record Data Protection & InfoSec(Compliance) Karl Chanman	27 May 2022	Email sent	0	1	

+ Create New Application

Settings 3.12.0

Campaign

Name	Description	Begin Date	End Date	Respondent %	Active	Date Created	Action
Campaign Example for Cu...	Example to share with potential ...	5 Feb 2022	31 Dec 2022	10.53%	<input checked="" type="checkbox"/>	5 Feb 2022	⋮
Annual DPA & InfoSec 2021	Annual Data Protection and Info...	7 Dec 2021	30 Nov 2022	92.86%	<input checked="" type="checkbox"/>	7 Dec 2021	⋮

Edit Campaign

General + Upload User List + Add User Delete Respondents

Respondents/Status **Respondents**

Search

All Incomplete Complete

Username	Name	Phone(Optional)	Date Completed	Date Sent	Action
----------	------	-----------------	----------------	-----------	--------

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

Campaign

The screenshot displays the Kim Document application interface. On the left, a sidebar lists navigation options: Get Started, Quick Automation, Applications, Accounting Firms, Compliance, and Data Protection & InfoSec. The main area shows a 'Bulk Download' dialog box with the following fields:

- Application ***: Data Protection & InfoSec (Compliance)
- Campaign**: Annual DPA & InfoSec 2021(7 December 2021)
- Download type ***: xml, xlsx, package
- Created From**: Select a date... (calendar icon)
- To**: Select a date... (calendar icon)
- Updated From**: Select a date... (calendar icon)
- To**: Select a date... (calendar icon)

Buttons at the bottom of the dialog are **Download**, **Delete**, and **Close**. A red arrow points from the 'Bulk Download' menu item in the top right user menu to the dialog box. Another red arrow points from the 'Download' button to a data table below.

	CreatedBy	Date	YourName	ConfirmedAttender	ConfirmedD	ConfirmedD	ConfirmedClearDe	ConfirmedU	ConfidentialityAc
2 PM		December 2, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
18 AM		2 December 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
8 PM		December 7, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
2 PM		December 8, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
7 PM		December 2, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
0 PM		December 2, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
3 PM		December 6, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
1 PM		December 2, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
7 PM		December 2, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
5 PM		December 2, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
the 0 PM		December 2, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
1 AM		2 December 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
8 PM		December 2, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
5 PM		December 2, 2021		Confirmed	Confirmed	Confirmed	Confirmed	Confirmed	Confirme
	Data Protection & InfoSec	Annual Compliance Record	12/7/2021 8:37:49 PM						
	Data Protection & InfoSec	Annual Compliance Record	12/7/2021 8:23:49 PM						
	Data Protection & InfoSec	Annual Compliance Record	12/7/2021 8:21:54 PM						
	Data Protection & InfoSec	Annual Compliance Record	12/7/2021 8:15:40 PM						

You can bulk download and analyse all responses

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'

The screenshot shows the Kim Document interface. The top navigation bar includes 'Kim Document - The form, document and records management office productivity tool', 'Help', and the user 'Karl Chapman'. The left sidebar contains a navigation menu with categories like 'Get Started', 'Quick Automation', 'Applications', and various industry-specific sections such as 'Accounting Firms', 'Compliance', 'Data Protection & InfoSec', 'Financial Services', 'Franchisors', 'Government', 'Insurance', 'Legal', and 'PoC in a Day'. The main area displays a table of 7 records. A context menu is open over the 'Order Form - Services(Legal)' record, with the 'Publish Webform Link' option highlighted. A red arrow points to this option. A tooltip for 'Publish Webform Link' is visible, stating: 'Send this link to yourself or another party. This will allow this form to be published in other systems (e.g. SharePoint, Salesforce ...)'. The table data is as follows:

Subject	Activity	Note	Attachment	Version	Action
On-Boarding Checklist On-Boarding Checklist(Compliance) Sarah Sheehan	25 May 2022 Reviewed		0	1	
Cost of Living Estimate Form Cost of Living Estimate Form(Compliance) ... Marianne Mason	14 Apr 2022 Added note for docume...	Sarah, test ...	0	1	
Annual Compliance Record Data Protection & InfoSec(Compliance) Jacqueline Aquino	7 Dec 2021 Reviewed	Complete response received	0	1	
CS Weekly Report Weekly Report(Small/Mid Businesses) Karl Chapman	16 Nov 2021 Reviewed	Please see weekly report for 7 March 2021	0	2	
SRA AML Declaration AML Declaration(Regulators) Karl Chapman	15 Nov 2021 Reviewed	Thank you for your response. This file is now closed until the next review.	2	1	
Life and Order Form Order Form - Services(Legal) Karl Chapman	28 Oct 2021 Reviewed	Please review, amend and return. Please sign if you have no amendments	0	9	
Pension Fund Compliance(Compliance) Karl Chapman			0	2	

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.

The screenshot shows the Kim Document interface. The top navigation bar includes 'Kim Document - The form, document and records management office productivity tool', 'Help', and the user name 'Karl Chapman'. A sidebar on the left lists various categories: Compliance, Data Protection & InfoSec, On-Boarding Checklist, Pension Fund Compliance, Financial Services, Franchisors, Government, Insurance, Legal, PoC in a Day, and a '+ Create New Application' button. The main area displays a list of documents with columns for document name, date, status, and user. A modal dialog box titled 'Publish Webform Link (Data Protection & InfoSec)' is open, featuring a text input field labeled 'Publish Webform Link *' with the placeholder text 'Enter email address.' and 'Send' and 'Cancel' buttons.

Document Name	Date	Status	User	Count 1	Count 2
Cost of Living Estimate Form	14 Apr 2022	Added note for docume...	Sarah, test ...	0	1
Annual Compliance Record				0	1
CS Weekly Report				0	2
SRA AML Declaration				2	1
LifeArc Order Form				0	9
Quarterly Pension Fund Complian...	7 Oct 2021	Reviewed	Please find the quarterly compliance assessment please complete ...	0	2

Business need

Whatever the letter, form, checklist, compliance record or contract we have automated, we want a tool that allows us to collaborate internally and/or externally. Managing all the records, versions and data extraction/analysis in one place. We want a tool that can:

- send documents via **email**; 
- **share** the document and allow editing and version control; 
- be sent as a **web link** so that a recipient simply completes the form and submits it; 
- be used as **campaign** and sent to multiple recipients at the same time, managing the responses; 
- create a **published webform link** (URL) that can be embedded on our internal systems or publicly facing websites for Users to access and complete; 
- we can use seamlessly in **MS Teams** 

Welcome to Kim Document!

Document automation at the speed of light

Tag it



Upload it



Automate it



Activate it



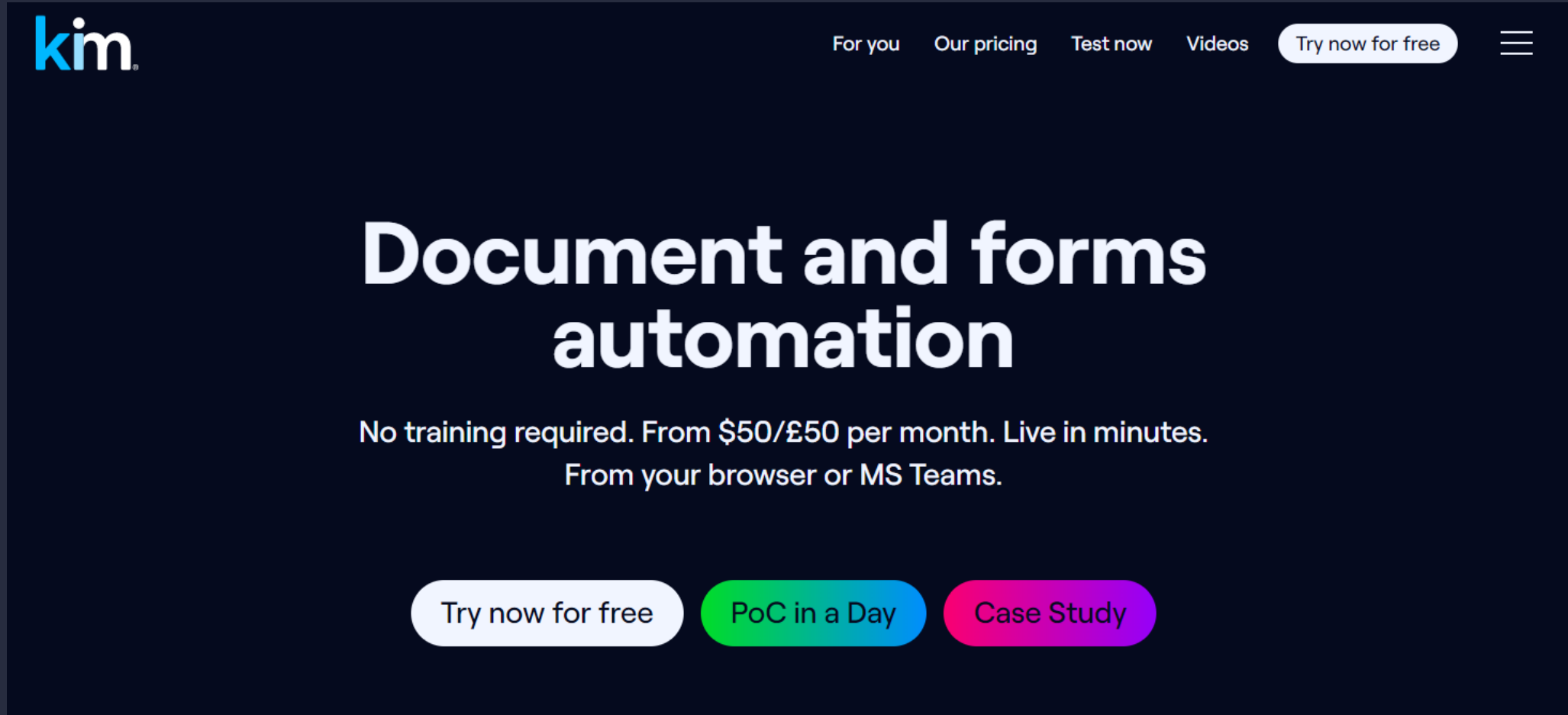
Share it



Analyze it



Sign up at www.kimdocument.com

A screenshot of the Kim Technologies website homepage. The page has a dark blue background. At the top left is the 'kim' logo. To the right of the logo are navigation links: 'For you', 'Our pricing', 'Test now', and 'Videos'. Further right is a white button with the text 'Try now for free' and a hamburger menu icon. The main content area features a large white heading 'Document and forms automation'. Below the heading is a sub-headline: 'No training required. From \$50/£50 per month. Live in minutes. From your browser or MS Teams.' At the bottom of the main content area are three buttons: 'Try now for free' (white), 'PoC in a Day' (green), and 'Case Study' (purple).

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