# KICS

User Guide – V 3.6.9

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# **Overview and Sidebar**

### Overview

KICS was designed to significantly reduce the time involved in gathering information. All of your forms, questionnaires, assessments or surveys are now paperless and the data easier to manage.

Forms can be created easily online and the process is flexible enough for multi-part forms to be partially filled in, submitted and passed on for further use, reply or authorization.

Each organization will require a 'System Administrator' user who is responsible for the upkeep, configuration and operation of KICS. In this role the user will develop templates and assign security rights, or permissions, to the accounts. The roles determine which accounts can view each form, right down to which page.

<b>Information</b> : This page displays custom information for a logged in user. This information can change based on role.
<b>Fill out a Form</b> : Lists all forms that are available for the user to complete.
<b>Retrieve a Form</b> : Provides user with the ability to retrieve a previously saved form.
<b>Generate Reports</b> : Provides user with the ability to export form questions and responses into an Excel file or view basic
customized analytics. <b>Role Manager</b> : Create roles that will apply to each user account.
Account Manager: Create accounts with usernames and passwords and apply roles.
Mobile Manager: Lists any smart devices linked to the KICS
app.
Admin Requests: Area where system administrator may approve the deletion of templates.
<b>Template Manager</b> : Create and customize form templates. Assign permissions, set notifications, integrations and
publishing.

### Sidebar Menu

# System Setup

### **Accounts and Roles**

### **Adding an Account**

- 1. Select Account Manager from the sidebar, then Add Staff Login (top right)
- 2. Complete login details.
- 3. A password will automatically be assigned, however, you may create a custom password at this stage if you prefer.
  - Require new password at next login: Select "Yes" to provide the user the ability to customize their own password when first logging in.
  - Send welcome email to user with Username and Password: Select "Yes" and the system will send an email to the email address provided with login details.
- 4. Select Save

Account Profile		
Usemame		
First Name		
Last Name		
Email Address		
Password	[	
Password (Verify)		
Automatically Gener	rated Password is pol7EzBs	
Require new passwo	ord at next login: 🖲 Yes 🔿 No	
	I to user with Usemame and Password: 🖲 Yes 🔘 No	

From:	Occupational Health and Safety [noreply@kicsdata.com]
To: Cc	Sarah McCarthy
Subject:	KICS - New Account
Hello S	
You are	e receiving this email because an account has been created for you to access KICS. visit the KICS site by accessing the following URL.
http://l	kics.abc123.com/kics
Under	"Login Login", use the following credentials to sign in.
Userna	me: assist

### **Customizing an Account**

- 1. From the Accounts page, select Edit button that corresponds with the account you wish to configure.
- 2. The account properties will open in a new window.
- 3. Choose from the tabs to configure each option:
  - a. Profile Edit account details, eg. Change password or username
  - b. Regional Settings Set time zone, date format and country for this role
  - c. Assigned Roles View/Select which role(s) are assigned to this account
  - d. Reports Generate a list of forms and pages this account has access to
  - e. Mobile Devices Pair a mobile device to this account
  - f. Advanced Deactivate or delete user
- 4. Save Changes

Sally Smith						Cancel Changes	Save Changes
Profile Region	al Settings	Assigned Roles	Reports	Mobile Devices	Advanced		
Usemame	assist						
First Name	Sally						
Last Name	Smith	Smith					
Email Address	s.mccart	s.mccarthy@parklanesys.com					
Password			]				
Password (verify)			1				
		ve failed password t next login: 🖲 Ye		) Yes 🖲 No			

### Adding a Role

- 1. Select Role Manager from sidebar, then click Add Role (top right)
- 2. Provide a description of role, eg: Manager or Administrative Assistant

Add a Local Role	۲
Role Name: Administrative Assistant	
💿 Save	

3. Select Save

### **Customizing a Role**

- 1. From the Role Panel, select Edit alongside the role you want to configure
- 2. The role properties will open in a new window
- 3. Choose from the tabs to configure each option:
  - a. **Summary**: Edit role name and view role type (local role = created by administrator)
  - b. Information for Members: Text area to provide information or instructions to any users logging in who have been assigned that role.
  - c. Members Click checkbox beside each account to assign this role to that user.
  - d. **System Privileges** Should this role require any administrator-type functionality, this can be applied here.
  - e. Template Privileges Report Will contain list of templates and pages this role currently has access to.
  - f. **Advanced** Delete Role
- 4. Select Save Changes

Administra	ative Assistant			Cancel (	Changes 📀	Save Changes
Summary	Information for Members	Members	System Privileges	Template Privileges Report	Advanced	
Role Descri	ption: Administrative Assista	ant				
Role Type: I	Local Role					

### **Predefined Roles**

**Public (Not Logged In)** – No system privileges are available for this role. Adding this role to a template and assigning permissions will allow a user to view and fill in a form without logging into the system.

**Logged In** – No system privileges are available for this role. Adding this role to a template and assigning permissions will apply to *any* logged in user.

**System Administrators** – Full system privileges are available for this role. Adding this role to a template and assigning permissions will apply to any system administrator.

**Logged In – Employee Sign In** – Role is only available when secondary authentication is activated in System Settings. No system privileges are available for this role. Adding this role to a template and assigning permissions will apply to any logged in user using the Employee Sign In method.

### **System Settings**

### **General Information**

This page provides the URL where KICS resides. This URL is used by items such as email notifications.

### Authentication

KICS has multiple authentication options and settings available over and above locally created accounts and roles.

Available settings and options are:

#### General

- 1. Turn on and set your session time out settings.
- 2. Activate Secondary Authentication
- 3. Change the wording and information on the login page for your users with a locally created account in KICS.
- 4. Change wording and information for Secondary Authentication

#### Local

Configure your local account password settings.

#### LDAP

This page allows you to set up LDAP Integration with KICS (contact KICS Support for information)

#### SAML/ADFS

Configure Federated Services (contact KICS Support for information)

#### **Group Import**

This page allows you to import user groups into KICS when using LDAP integration. (contact KICS Support for information)

#### User Import

This page allows you to import users into KICS when using LDAP integration. (contact KICS Support for information)

#### Secondary Authentication

Configure password policy and authentication settings for Secondary Authentication.

### **Regional Information**

This panel allows you to configure your regional settings. These settings include: default country, time zone and date format.

### Branding

Customize the look of your KICS system with colours and your logo.

1. The custom branding is activated by clicking the "Enable KICS Custom Branding" check box

em Settings				
General Information	Branding			
Authentication				
Regional Information	Enable KICS Custom Branding 🖉 🖌			
Branding	Title Bar / Icons / Tabs / Categories			
Auditing	Background Color	Single Color 🛩	•	
Email Configuration	Font Color	<b>•</b>		
Form Settings				
Self-Hosted	Bottom Border Color			

- 2. Begin choosing your colours by clicking on the corresponding dropdowns.
- 3. The first logo will replace the KICS logo in the top left hand corner of the screen. Your logo should be no larger than 269 x 40 pixels. Ideally, it should be a white copy of your logo.
- 4. The second logo will appear on all KICS PDF documents and can be a full colour version. This logo will automatically resize to fit the page.
- 5. Choose from additional branding options such as background images and sidebar colours, etc
- 6. Select "Save" when complete.
- 7. Perform a hard refresh to view your changes (CTRL + F5)

### Auditing

You may track the actions of accounts/users, including authentication requests, and form interactions such as form viewing, updates, and changes.

Audit Logs are stored as external text files and are not available within KICS.

- 1. Select "Yes" to enable auditing
- 2. Choose the Log Rotation from the drop down provided
- 3. Select all action requiring auditing
- 4. Save Changes

Enable Auditing  Yes  No
Audit Log Rotation
You may establish the frequency of creating a new log file. The preceding audit files will remain intact. The frequency of rotation will determine size of the audit files verses the number of files to review.
Rotation: Monthly V
Actions Required Auditing
Authentication - Login Attempts
Forms - Open / Read a Form
Forms - Create a Form
Forms - Complete a Page

### **Email Configuration**

Email Notifications are used throughout KICS for features such as Form Entry Notifications and Password Resets. Contact your Information Technology department for the data required for these fields.

This area also allows you to change the name that appears in the From Line of the email notifications and the From Email.

### **Form Entry Settings**

#### Barcode Display

For every form submission there is a unique code that identifies that particular submission. Should you wish a bar code to accompany each submission, you can choose from a 1D barcode (sample below) or a 2D QR code.

b Application			
Form Submitte	ed Successfully		
	en successfully submitted into the KICS System. ce, the confirmation code for this form is: A-77-4-32883		

#### Signature Methods

Signature fields are included in your template questions. In this section you can enable two different signature types.

- 1. On Screen this option enables signature capture using a touch screen tablet or a mouse
- 2. Topaz enabling this option allows for signature capture using a plug in Topaz signature device

Of these types, you can also set the systems Default Signature Method.

Signature Methods The following signature methods are provisioned on your KICS System. If you have multiple methods enabled, they will be available when the user clicks "Sign". The default signature method will be launched when the user clicks "Sign"
Method Enabled On Screen  Yes No Topaz Yes No
Default Signature Method On Screen 🗸

#### **Additional Settings**

The remaining settings are to be adjusted only by Parklane support staff. For more information on these settings, contact your KICS support representative.

General Information	KICS Self-Hosted			
Authentication	KICS Poller			
Regional Information	KICS Poller Your KICS system requires the use of a poller for administrative and background tasks. This poller operates as a scheduled task on the KICS server.			
Branding	Poller Operating Correctly: Yes			
Auditing				
Email Configuration	License Status: Online License			
Form Settings	Cicense scates, chance License			
Se#-Hosled				
External Forms	Kics Online If you have an online license, your KICS server requires outbound communication to kicsdata.com			
Parklane Integration		the proxy server address is required for outbound communication		
SQL Export	Proxy Server Host	(example: proxy mycompany com, or 10.5.11.22)		
License	Proxy Server Port	(example: 8443)		

# **Creating a Form**

### The Template Manager

### Adding a Template

- 1. Select Add Template (top right)
- 2. Enter the name of your new form
- 3. Add a description of the form (optional)

Add Te	emplate
There are	2 steps involved to add a template
	tivide the summary information below and, on the next 2 pages. On completion, you will be returned elect the new temptate and define the questions and access rights.
Name	Job Application
Descri	Internal Employee Job Application
Catego	ny (HR Forms)

- 4. Enter a category name provides the ability to group alike forms under one heading
- 5. Select Next
- 6. Provide a name for your form page
- 7. To add additional pages to your form, select Add Another Page
- 8. Select Next

Add Temp	late	
A simple templat	mprised of pages e would most likely consist of one sages may also be used for proce	
Page Name	Employee Details	Delete Page
Page Name	Previous Job History	Delete Page

- 9. Select which roles will have access to this form when published If you are not sure, additional roles can be added later, however, one must be chosen initially. Select your own to start.
- 10. Select Create Template

### **Template Sidebar**

Once your template has been created, a summary panel will appear. Each time you access your template, this will be displayed.

Job Application			
Surmary			
Name / Description	Status	Availability	Visible
integration	Draft	New, Partial and Completed Forms	Yes
Pages	Template is in Edit Mode where changes can be made.	-New forms can be started	The form is visible from the Form List page. The form of
Guestions.	The Template is not be available for form submissions.	Partailly Completed Forms can be Retrieved     Completed Forms can be viewed:	also be deeply accessed by the URL below.
Permissions			Form Entry Page
Notificatione		Charge	of Chang
Retrieval : Export			
3QL Export	Form Has Responses?	Template Last Updated	Template Comments
Mobile Access	No	2022-11-28 11:54:26	
Advanced	No Form Responses have been submitted for the template	This date indicates the last time the template was motified.	
	In this state, you can change back to Draft if need be.	(Consider)	

#### Summary

- 1. **Status** displays the status of your form Draft/Published. To publish your form, select Change, then Publish from the drop down.
- 2. Availability Displays the availability status of your form. This can be edited by selecting Change.
- 3. **Visible**: Displays the visibility of your form and provides a link that will bring you directly to the form. You can hide your form by clicking Change.
- 4. **Form has Responses**? Displays whether your form has received responses. If "Yes" is displayed, then only certain items can be changed if you choose to change your form back to Draft. If "No" is displayed, then you can safely change your form back to Draft and edit the form.
- 5. **Template Last Updated** the date and time the template was last edited.
- 6. Template Comments An area to provide comments about the form. Select Change to edit.

#### Name/Description

This panel provides the opportunity to edit the name, description and category of your template.

#### Integration

This panel provides the ability to integrate with the Parklane System. *More information on integration can be found in the Additional Functions chapter of this guide.* 

**Module** – If integration ability is available to you, select the module you wish your form to integrate with. Selecting the module will provide integrated fields available in the Questions section. Leave blank if no integration is required.

**Company** – This selection allows you to choose which company to send the integrated information to (should you have multiple Parklane Companies). If the module drop down is blank, selecting Company only will provide employee search options on your form.

Job Application	
Summary	Integration and Employee Lookup
Name / Description	If you are sending all responses for this template to Parklane, please provide a Module AND Company for this
Integration	If you are only using the Employee Lookup feature, and want to keep this template local, please leave the Moo
Pages	You cannot add any Parklane questions until one or both of these are specified.
Questions	To use this template as a local template, set the <b>Module</b> AND <b>Company</b> to blank.
Permissions	
Notifications	Module: Company: Parklane Systems Inc - ON (001) V
Retrieval / Export	Save Changes

#### Pages

This panel provides the ability to add additional pages and/or edit page names.

#### Questions

This is the main form building area of your template. Here is where you will customize and add questions, categories and layout of your form.

#### Permissions

This area allows you to assign read/write permissions to the forms and pages based on role. This area will also allow you to add additional roles to your form.

#### Notifications

Set up your email notifications for your form. Allows you to arrange notifications based on form status, page completion and notifications based on question responses.

#### Retrieval/Export

Retrieval Filters allow you to restrict the lookup, export and analytics of forms based on a provided value. These Filters work by assigning roles that can search, export and perform analytics on forms using specific values on the template.

#### SQL Export

Should the SQL option be part of your KICS package, this section allows you to activate SQL export of form questions and responses of that template. *More information on SQL Export can be found in the Additional Functions chapter of this guide.* 

#### Mobile Access

Ability to make this template available on the KICS mobile app.

#### Advanced

Clone This Template - selecting this option will create a duplicate copy of this template

**Delete This Template** – selecting this option will delete the template. Once selected, the deletion remains "pending" until the system administrator approves the deletion.

**Export This Template** – selecting this option allows you to export the created template (not including responses) to a file. This file can be shared with other KICS users and imported into their own system.

### **Building Your Form**

### **Adding a Question**

While in your KICS template, select Questions from the sidebar. A number of options are available along the top of what is now your blank form.

🔍 Preview Template	<b>₽</b> Arrange Questions	Add a Category	Add a Question

**Preview Template** – Selecting allows you to view and experience your form (opens in a new tab) before it is published. Any changes or submission made in the preview mode will not be saved and any email notifications will not be delivered.

**Arrange Questions** – When clicked, you may rearrange your questions by dragging and dropping. When complete, select Finished to set the form.

**Add a Category** - Assists in visually separating different categories of questions. The category bar takes on the colour branding set by the user in the branding section of settings.

Add a Question – When clicked, a pop up appears where the user can decide which page to place the question, what type of question to add, and the label/question that will accompany it.

Add a Question 😵
Select the page this question is to reside on. Select the type of question. Provide the text that will appear on the form. Once you're finished adding questions, they will appear in a list. At this point assign the properties of each question by clicking on the Down Arrow to the right of each question. Page: Page 1 •
Question Type: Date
Question description/label/text Enter the Date:
Close Save and Close Save and Add Another

#### To add a question:

- 1. Select Add a Question from the buttons along the top of your template.
- 2. Choose which page (if there are multiple pages) you wish to add the question.
- 3. Select from the Question Type drop down which question to add.
- 4. Enter the text required for the question.
- 5. Select Save and Close to add the question to the template.

### **Question Types**

#### A variety of question types are available to choose from. They are as follows:

- Information Box with Calculation(s) Adds a text box to the template which provides the user with space to provide information about the form. The text in this area can be formatted in size, font and colour, etc. Calculations are also made here.
- Short Answer Adds a short text field that can be set up to 300 characters.
- Long Answer Adds a large text field. The character limit can be set by the user.
- Yes or No Adds a Yes or No radio button.
- Date Adds a date field. Can be configured to be a range and includes the ability to include a "Today" button.
- Time Adds a time field.
- Combined Date and Time Adds a Date and Time field together.
- Select Answer Adds option to ask a question with multiple options to choose from. Can be configured to provide a radio button, drop down or check boxes.
- Signature Answer Adds an electronic signature line to your form.
- File Upload Adds an electronic file upload button to your form.
- GPS Location Adds a GPS button to your form which can capture precise GPS location of the person completing the form.
- Predefined Question Types These include: Email Address, First Name, Last Name, Address and Telephone Number. These are formatted to include completed question labels (which can be edited) and can be added quickly to your form.

Add a Question	M		
Select the type Provide the text Once you're fin	that will appear on the form, shed adding questions, they will appear in a l sign the properties of each question by clickin		v to the right of each question.
	Information Box with Calculation(s) Short Answer Long Answer / Comment Yes or No Date Time Combined Date and Time Select Answer (single or multiple) Signature File Upload GPS Location Predefined Question Types Below Email Address First Name Last Name Address Telephone Number	ve and Close	Save and Add Another

### **Question Properties**

Each question has a different set of properties that can be configured by the user. In the image below, a Date question has been added to Page 1 of the blank template.

To access the properties of this question click on the blue chevron (circled) on the far right of the question. This will expand the question and display the properties.



In this example, the user can:

- Change the question label
- Set how many time the question can be answered
- Enable a date range
- Include a "Today" button
- Choose which date types can be chosen (all, future only, past only, etc)
- Repeat Answer
- Default Answer
- Lock Default Answer
- Visibility and Mandatory settings
- Conditions

ige 1		
Yes the bate	4	^
ascription/lates/set to appear on torm.		
Enter the Date		
This question allows for a single proved     This question allows for up to     answers		
Date Guestion Properties		
Noved Dates: Any Date +		
Separt Answer Used. The first time is user provides an amover to the specific. The answer will be kept for house form and automatical, inserted and the answer Trait is until the answer is changed or removed. This foultive elementation the need for the user form-enter the same answer every time. NOTE: Repeat Answers by accurate are available for users who are koged in , and not for palad users		
Inpent Answer Do Nicl Report v		
Defacit Answer No can specify a default answer that will automatically be populated for this question every time this form is filled out, if a Repeat Answer's net defined, CR II funck Cellaut Answer's is Unix question shows for multiple answers, circle for answers will be defaulted. MPORIANT: This value will NOT be stoopd when't this question's answer is tolders.	eced.	
Setau Amuer (myymmia)		
I the "Lock Default Answer" flag is Selected. In The Default Answer will be approved, so the user cannell change it. In The same will NOT be spose whether the guestient's answer is hidden. In The will eventuate any "Report Answer" default.		
.xxx Detuit Answer 🖸		
This guestion's defaul status is, 🖷 Vision 🗇 Hotser. 🗇 Hotser 🔍 Hotser I (This default status is used if NO condition(s) are created CR if those condition(s) are NOT met;		
Condition(s) For This Question		
Add a Condition to Maker This Gaussian Hotjen		
<ul> <li>Institute and a second sec second second sec</li></ul>		

Once the properties have been set, select Save Changes. The selections made will now be reflected on your form.

The properties to each question can vary and most settings are explained in the properties themselves.

#### Making a Question Mandatory

- 1. Open the question properties
- 2. Select Mandatory under the default status section
- 3. Save Changes

### **Conditional Questions**

KICS allows you to hide questions that will be visible only when a condition is met. For instance, on a job application form, when asking if they have been previously employed by the company, if the applicant indicates **Yes**, a follow up question will appear asking their position when last employed by the company. If **No** is selected, the question remains hidden.

#### Sample:

Job Application	
Were you ever previously employed by this O Yes O No	s company?
Upload your Resume Choose File No file chosen	Upload

Additional question appears when "Yes" is selected.

Job Applica	ation		
Were you eve	er previously employed by this company?		
● Yes ○ No			
	What was your position when you were last employed by the company?		
	Upload your Resume Choose File No file chosen Upload		

#### To add a Conditional Question

- 1. Add a question to your form.
- 2. Add the question you wish to appear conditionally.
- 3. Open the properties of your conditional question.
- 4. Near the bottom of the properties are the default status options.
- 5. Change the default status to **Hidden**. This will hide the question from your form.
- In the section Condition(s) For this Question" select either Add a Condition to Make This Question Visible (not mandatory) <u>or</u> Add a Condition to Make This Question Visible AND Mandatory.

This question's default status is:	○ Visible	Hidden	$^{\bigcirc}$ Mandatory	(This de	
Condition(s) For This Q	uestion				
Add a Condition to Make This Question Visible					
O Add a Condition to Make This Question Visible AND Mandatory					

- 7. Next, from the drop down select the question you wish this question to be dependent on.
- 8. In the second drop down, select the condition.
- 9. Finally, select the response that will make this question visible.
- 10. Multiple conditions can be added to one question if a variety of requirements are necessary.

condition(s) For This Question
Add a Condition to Make This Question Visible
Add a Condition to Make This Question Visible AND Mandatory
All or Any of the following conditions must be met to make this question visible AND mandatory: $ ullet $ All $ igcarrow$ Any
Employee Details-Were you ever previously employed by this company? • ] Equal To (Any) • ] Yes •

There are many conditions available to choose from. Most are self-explanatory, however, if you require further clarity on what the different conditions are, contact KICS support.

### **Deleting a question**

<u>Important note before deleting a question</u>: If your form was never published and has no responses, you can safely delete a question. If your form *has* responses and was unpublished in order to remove the question, deleting the question will also delete any and all responses to that question. If you want to remove a question and retain all the responses, open the question properties and set the default question status to **Hidden**.

- 1. Open question properties
- 2. Select Delete Question
- 3. A confirmation window will appear If there are any warnings, they will appear here
- 4. Click OK to remove question

### Moving a question

- Select Arrange Questions button at the top of the page this will set the template into Arrange mode and a Finish and Cancel button will appear
- 2. Click and drag the question(s) and drop them to their new location
- 3. Once complete, click Finished

Note: If your template has responses, questions cannot be dragged to a new page.

**Tip**: To move a question swiftly up or down the page, click and hold the mouse key and use the scroll bar on your mouse (or arrow keys) to help move the question along.

### **Previewing Your Template**

To preview how your form will behave, select Preview Template at the top of the page. Another tab will appear and allow you to populate your form fields.

#### Note:

- It will not be stored when you submit it
- No Confirmation Code is associated with this form
- All Pages (regardless of permissions) are available for your review
- Disregard Exit this form dialogue box and the Page Saved as Complete page
- Close the browser tab to exit

### **Form Permissions**

The Permissions panel of your template allows you to determine, by role, who will have access to your form. There are two sets of permissions: Form Accessibility and Page Actions.

#### Adding a Role to Your Template

You can add additional roles to your form by clicking "Add Role", choose from the available roles in the drop down, and then click

"Add Role". This will add this role to the permissions panel. Once added, Form Accessibility and Page Actions can be set for this role.

#### Deleting a Role from Your Template

Select "**Delete Role**", choose which role you wish to delete from the drop down, and then click "**Delete Role**". Any User with this role will no longer have access to the completed form.

#### Form Accessibility

The following permissions are available:

- Form Entry When checked the user will be able to see this form on the Fill out a Form (or Show Available Forms) panel.
- **Retrieve Partial** The user will be able to open and edit a partially completed form (eg. A form that has been saved before it was completed)
- **Retrieve Complete** The user will be able to open a form that was submitted in its entirety. Complete forms are locked and cannot be edited.
- **Retrieve Search Page** Access to this page allows the user to look up submissions manually by confirmation or by use of form filtering capabilities. <u>Note</u>: If this is <u>not</u> checked, any user with retrieve capabilities can only retrieve forms via hyperlink provided in emailed form notifications.
- **Export/Reports** Access to this page allows the user to export all submissions into MS Excel. <u>Note</u>: this permission setting supersedes individual page permission settings. All data is currently available in exports.
- **Delete Partial** Provides the user with the ability to delete partially submitted forms.
- Delete Complete Provides the user with the ability to delete completed forms.

In this example, three roles have been added to have access to this form. All roles have various permissions to the form.

Form Accessibility							Delete Rote Q Add R
Role Name	Form Entry	Retreve Partial	Retreve Competer	Relieve Search Page	Export / Reports	Delete Partial	Detette Complete
System Administrations	0	8	0	0		0	
Public (Not Logged 4r)	0	Ô	0	0			
Manager	-					0	0



#### **Page Actions**

The following permissions are available by page:

- **View** When selected, this user can view the content of the page.
- Edit When selected, this user can edit the page.
- Save Incomplete When selected, the user is able to save the form on that page and complete at a later time.

Select Save Role Permissions when complete.

In the example below, the System Administrator and Manager can view the first two pages but do not have the ability to make any changes. The third page is only available to the System Administrator and Manager. At no point is the Public User role able to save their form – they can only enter and submit in this example.

View 5 5 5		Bave incompete Cl Cl Cl
	0	0 0 0
		0
	a	100
		0
Mark.	Ede	Saw incompate
E2 (	0	0
2	8	0
5	0	O.
	Ede	Bave incomplete
<b>1</b>	2	<b>a</b>
0	0	<ul> <li>(3)</li> </ul>
		0
	S S View	Vew Edit

### Notifications

The Notifications panel of your template allows you to configure multiple notification prompts and recipients. There are three notification condition types: by Form, by Page and by Question. These condition types can be found by clicking on the titles along the top of the Notifications panel.

Form Conditions – Send notifications based on status of the form

Page Conditions – Send notifications based on status of the page

#### Status Types:

- New Form/Page Send email when a Form/Page is submitted for the first time
- Update Form/Page Send email when the responses on the Form/Page are changed
- Complete Form/Page Send email when a Form/Page is submitted and marked complete
- *Complete Section (page conditions only)* Send email when an account submits the *last page they have access to*. This applies to multi-page documents that are to be completed by multiple people.

Question Conditions – Send notifications based on responses to questions on the form

#### Email Types:

- *Manual Input* Email is sent to a manually entered email address that is stored here. To send to multiple addresses, use a semicolon (;) between each one.
- *Template Question* Email is sent based on the response to an **'Email Address'** or **'Employee Lookup'** question type on your form. If these question types are not on your form, you will not see this option.
- Submitter Account Email is sent to the email address associated with the logged on User Account. Email Address is not required for this option.

\*for further detailed information, check the instructions box on the Notifications page

### Form and Page Conditions Notification:

- 1. Choose desired notification condition tab: Form or Page
- 2. Click Add Form/Page Notification
- 3. Select email type
  - a. If manual is chosen, enter the email in the corresponding text box
  - b. If template question is chosen, select the email field you wish the notification to be sent
  - c. If submitter account is chosen, the logged-on user will receive the notification

- 4. Next, choose whether there is to be an email link or a PDF copy of the form attached to the email notification by clicking the appropriate check boxes.
- 5. Determine when the notification is to be sent by choosing the corresponding status type from the drop down.
- 6. The notification defaults to 'Active' deselect to inactivate
- 7. Click Save Notifications

In the sample below, a notification will be sent to K. Smith each time the form is completed. The notification will include a link to the submitted form and a PDF copy of the form will be attached to the email.

Form Conditions	Page Conditions Question Conditions					
Form Level Cond	Blons - Click to toggle instructions 🗔					Save Noti
E-mail Type	Email Address	Email Link	Email POP	Notification	Active	Actions
				Complete Form +		( if Delete Notification

- Email Link This will include a link to the response in the email. Once clicked, the user(s) will be able to view the responses for the page(s) they have access to.
- Email PDF This will include a PDF copy of the response in the email. Emails will be sent on a per-page basis when the page reaches the 'Notification' status indicated.
- Active If checked on, the system will process that notification

**IMPORTANT:** The PDF contains response values that the submitter has access to. Therefore, ensure the email recipients in each condition are allowed to see the same contents if this option is enabled.

### **Question Conditions Notification**

- 1. Choose Question Conditions tab
- 2. Select Add Question Notification
- 3. Select a question to add from the drop down provided (available questions are: Yes/No and Select/Multiselect type questions)

#### Page – Question on that page

Add Question Notification
Question notifications allow you to send notifications to a specific email address depending on a selected answer.
You can assign question notifications to Select and Yes/No questions
Question to Add: Employee Details - Were you ever previously employed by this company? >
Add Notification Scancel Changes
Mount - Way ago include approximation in the amail patification to halp quickly identify outpro

- 4. After question is chosen, select Add Notification.
- 5. Choose when the notification is to be sent.

Form Conditions Page Condition	ors Question Conditions					
Question Level Conditions Circl	to toggle instructions 🗅					Save Notification
Employee Details - Were you eve Notify On	r previously employed by this company?	Complete Page	CLOCK Page		Con	Delete Notification
Value Yes No	Email Type Manual Input * Manual Input *	Email Address HR1@email.com HR2@email.com		Email Link	Email PDP	Active C

- 6. In the sample above a Yes/No question was selected. Therefore, indicate who is to be emailed when the user selects 'Yes' *and/or* when the user selects 'No'.
- 7. Choose any notification inclusions
- 8. Click Save Notifications

### **Email Body (Answer Tags)**

KICS has a default email notification structure; however, there is an opportunity to add form details to the email body. The default information includes: the form name and the reason for the notification.

- 1. Select Add Answer Tag
- 2. Choose the question to include in the email body. This will also include the accompanying response from the person filling the form. You may add multiple tags to the email body.
- 3. Click Save Notifications when complete.

Add Notification	Answer Tag
Answer Tags allo	w you to provide specific form submissions to the notification email
Please select the	question you want to include in the notification email:
Question to Add:	~
	Employee Details - Were you ever previously employed by this company?
	Employee Details - What was your position when you were last employed by the company?
	Employee Details - Email Address 6

#### Sample Notification

From: To: Cc:	Occupational Health and Safety [noreply@kicsdata.com] Sarah McCarthy					
Subject:	KICS Form Notification - Job Application					
🖂 Message	KICS-A-77-3-37229-202212291558	42.pdf (18 KB)				
	n automated KICS email. Pl					
	being notified for the followi					
NOTITICA	ation Type	Description				
Form C	m Complete The form has been marked as complete					
Templat	e Name: Job Application e Description: Internal Emplo ation Code: A-77-3-37229	oyee Job Application				
Questio	on		Value			
What w	What was your position when you were last employed by the company? Office Manager					
	access this form by <u>clicking</u>					
Attached	t is a PDF copy of this docur	nent.				

### **Retrieval Filter**

Retrieval Filters allows you to restrict the lookup, export and analytics of forms based on a provided value. These Filters work by assigning roles that can search, export and perform analytics on forms using specific values on the template.

#### To create a Retrieval Filter:

- 1. Select Add Retrieval Filter and then choose a Select or Yes/No question you want to filter.
- 2. Values to that question will be listed and you can choose the roles that can search / export responses with the corresponding value.
- 3. Save Retrieval Filter

	Assigned Roles	11-000110000000000000000000000000000000
	DECKER DECKERATION	
Add Role		
O Add Role	Narager	🗇 Delete
Q Add Role	Supervisor	(]] Oelete
Add Role	Administrative Assistant	() Ociete
	Add Role	Add Role Manager

#### **Considerations:**

- Retrieval Filters are cumulative. If a user is a member of multiple roles, the user will be able to search for all values assigned to their roles.
- You can assign a broad role for the Form Retrieval Permissions (such as manager) and use separate roles for the Retrieval Filter (Dept A, Dept B)
- If a Retrieval Filter is configured, all users with retrieval permissions must have at least one role assigned to a value. If not, the user will not be able to perform lookups or exports for that template.
- A Retrieval Filter will not be saved if it does not have any role assignments.

### Advanced

There are three functions available on the Advanced panel of the Template Manager.

- Clone This Template Selecting this function will allow you to duplicate your template. The duplicated template will include all permissions and notifications. This template will have the same name with " Copy" appended to the end of the title and will appear in your template list as a draft. You will be given the opportunity to rename before cloning is completed.
- **Delete This Template** This function will allow you to delete any obsolete templates. Depending on system settings, this may require administrators' permission to complete the deletion. In this case, the template will remain with a note that states: "Pending Deletion". Once the administrator approves the deletion, it will disappear.
- **Export This Template** This function will allow you to export your KICS template and share with another KICS user to import into their system. You will be given the opportunity to rename and/or include/exclude the notification settings. Roles and permissions will *not* be included in the exported template.

**Note about sharing your templates**: If your template is integrated, any integrated questions will need to be deleted and re-added to the template after the recipient imports the file.

### **Publishing Your Template**

- 1. Once your template is complete, select Summary from the sidebar.
- 2. Select the Change button in the bottom right of the Status area.
- 3. Click on the drop down and select Published.
- 4. Save Changes.

Template Status
Current Status: Draft
<b>Draft:</b> Is the initial status as you begin to develop a new template. Allows you to build and edit the template making additions or modifications. Is not available for usage and does not appear in any list of forms for input.
Once you are finished with the design of your template, you must <b>Publish</b> it to make it available for usage.
<ul> <li>Published:</li> <li>The design of the template is complete and available for usage. It will appear in the list of forms for input. The template is locked prohibiting changes.</li> <li>You may revert back to Draft to make changes.</li> <li>Please note the changes allowed will be limited if there are response(s) for this template.</li> <li>You may also clone the template which will provide you with a duplicated new template.</li> </ul>
Change the Template to: Draft Draft Published

5. Your published form will now be visible to those roles with permissions.

### Sharing the Published Form

- 1. On the Summary panel of your template, right click on the Form Entry Page hyperlink found in the Visible section on the right
- 2. Select Copy Link Address
- 3. Place link in email or add as hyperlink on your intranet page

To share all public forms, log out and return to the main KICS login page. Share the hyperlink to the Show Available Forms. All publically available forms will appear here.

KK	s
To se	Icome to KICS elect and complete a form, please click the button below.
Sf	Open link in new tab Open link in new tab Open link in new window Open link in incognito window Save link as Copy link address Inspect

### Making a Change to a Published Form

If the form has no responses, simply revert the status of the form back to Draft and make your changes. Should there be responses, you are able to change the form back to Draft, however, there are limits to the changes that can be made.

- Label Changes: If changing a question label, ensure it does not change the meaning of the question if you have responses.
- Deleting Questions: Deleting a question will delete any responses received to date. Alternatively, hiding the question by changing the default question status to **Hidden**.
- Arranging Questions: Once there are responses, questions can be re-ordered, however, they can no longer be moved to a different page.

# **Managing Data**

### **Retrieve a Form**

Once a form has been submitted, either partially or completely, you may retrieve the form in multiple ways. A form can be retrieved by confirmation code or by filtering the results by date or field values.

### **By Confirmation Code**

To retrieve a form:

- Copy and paste, or enter, the confirmation code into the field and select Lookup (or enter)
- If using a barcode scanner, ensure cursor is in Confirmation Code field and scan the bar code

The form will be listed at the bottom of the page. Click the Open button to view.

Retrieve	a Form
You ma	etrieve a form by using its confirmation code, or by searching for the record.
Confirm	tion Code:

### **By Form Filters**

Alternatively, forms can be filtered by form name, status, date and form fields.

#### To retrieve a form:

- 1. Select Form Name drop down and select the form you wish to retrieve
- 2. Next, select Form Status and choose from Completed Forms or forms that are Partially complete (eg. saved forms or forms that are not completed by all parties)
- 3. To choose all forms available, select **search** and all available forms will be listed below
- 4. Alternatively, users can:
  - a. *Search by Date* range of when the form was First Submitted or by Last Updated. Make selection, enter date range, then select Search.
  - b. **Search by Field** enter text or select options from the fields below and select **search**. The system will return a list of all forms that match the selections made.
- 5. Click Open to open the form

Search By Form
Form Name: Job Application
Form Status: Complete Forms
ronn status. Complete ronns V
O Search By Date:
Date First Submitted ✓ from yyyy/mm/dd
Search By Field:
Enter Job Code # you are applying for (if applicable):
What type of employment are you looking for (select all that apply)?
G Full Time
Part Time
Casual
Temporary
Were you ever previously employed by this company?
○ Yes
○ No
What was your position when you were last employed by the company?
Email Address
Search
ocalul

### **Generate Reports**

### **Response Export**

KICS allows users (with access) to generate exports of the questions and their responses from forms.

#### To generate an export:

- 1. Select Form Name drop down and select the form you wish to export
- 2. Next, select Form Status and choose from Completed Forms or forms that are Partially complete (eg. saved forms or forms that are not completed by all parties)
- 3. To export data from all forms available, select search and all available forms will be listed below
- 4. Alternatively, users can:
  - a. *Search by Date* range of when the form was First Submitted or by Last Updated. Make selection, enter date range, then select Search.
  - b. **Search by Field** enter text or select options from the fields below and select **search**. The system will export data from all forms that match the selections made.
- 5. A link is generated click this link to download an Excel file with the data from the forms.

Search	
Report has been exported to an Excel file (21 rows). Click to download	

### **Response Analytics**

In this section, users can create custom reports in the form of graphs or GPS mapping which update each time they are accessed.

#### To create a custom report:

- 1. Select Create a Report
- 2. From the drop downs select template name and report type

Create a Report			0
To create a repor	t, select the template you want to	create the report for.	
Template Name:	Incident/Accident Report	•	
Next, choose a ty	pe of report you would like to cre	sate	
Report Type: Re	sponse Statistics V		
	low you to caterogize, chart and rt, your form requires at least one	summarize the complete response e of the following question types:	is provided to your form
<ul> <li>Date, Tim</li> <li>Select or '</li> <li>Regional /</li> </ul>			
You are also rec	jured to have at least one comp	pleted response before you can	Create Report

- 3. Click Create Report
- 4. The report takes on the name of the template, however, should you wish to change the title, select Edit
- 5. Click Add Chart to begin building your report
- 6. Choose from the questions available for charting, then choose the type of chart from the second drop down and select Add Chart
- 7. The graph is build and can be further customized by selecting Edit.
- 8. Another graph can be created by selecting Add Chart



Of note, you can access the forms that make up the responses by clicking on one of the items on the graph. The confirmation codes associated with those responses will appear on the right. Click on the hyperlink provided to open the form.



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