KICS

User Guide – V 3.6.9

March 27, 2023

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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.

Sidebar Menu

Information: This page displays custom information for a logged in user. This information can change based on role.

Fill out a Form: Lists all forms that are available for the user to complete.

Retrieve a Form: Provides user with the ability to retrieve a previously saved form.

Generate Reports: Provides user with the ability to export form questions and responses into an Excel file or view basic customized analytics.

Role Manager: 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.

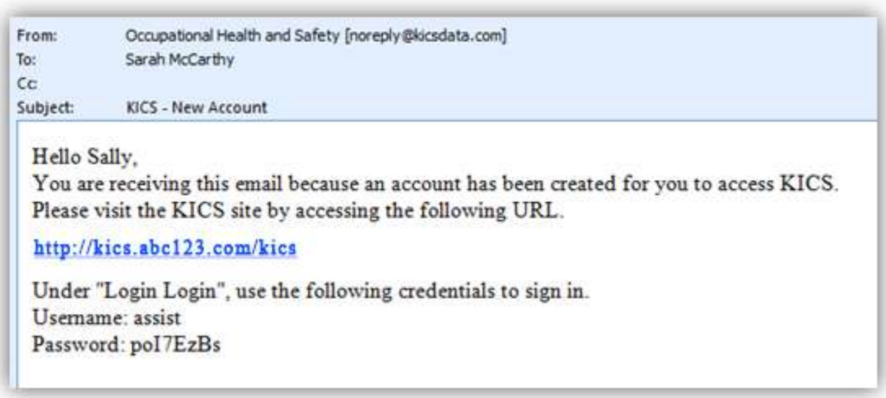
Template Manager: Create and customize form templates. Assign permissions, set notifications, integrations and publishing.

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


From: Occupational Health and Safety [noreply@kicsdata.com]
To: Sarah McCarthy
Cc
Subject: KICS - New Account

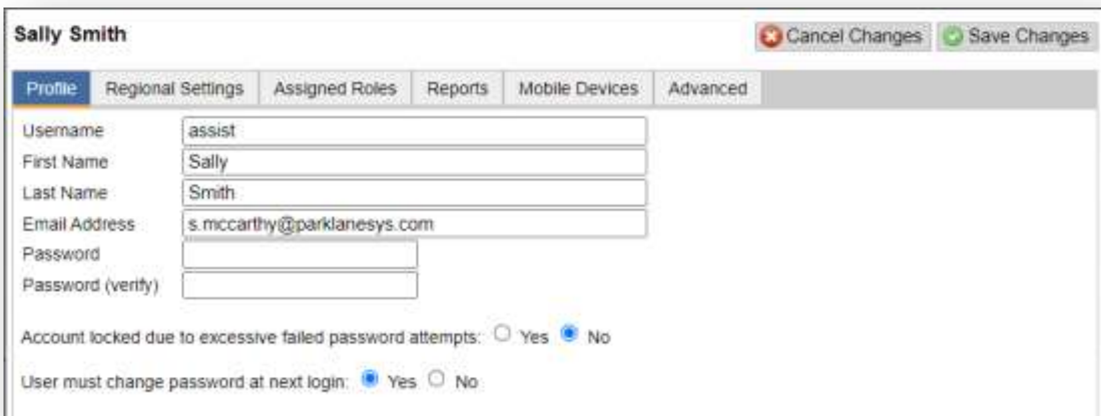
Hello Sally,
You are receiving this email because an account has been created for you to access KICS.
Please visit the KICS site by accessing the following URL.

http://kics.abc123.com/kics

Under "Login Login", use the following credentials to sign in.
Username: assist
Password: poI7EzBs

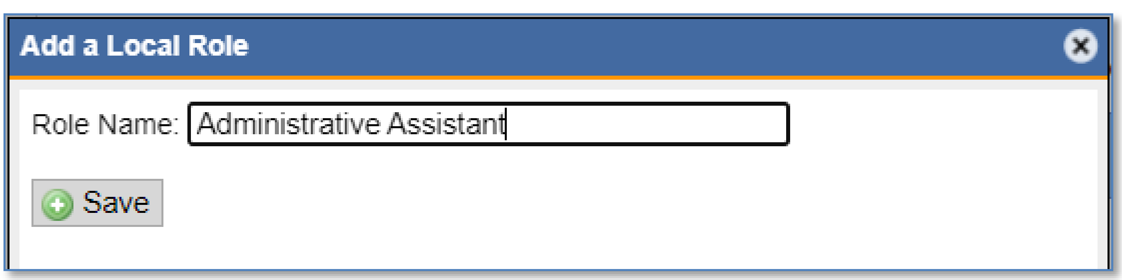
Customizing an Account

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



Adding a Role

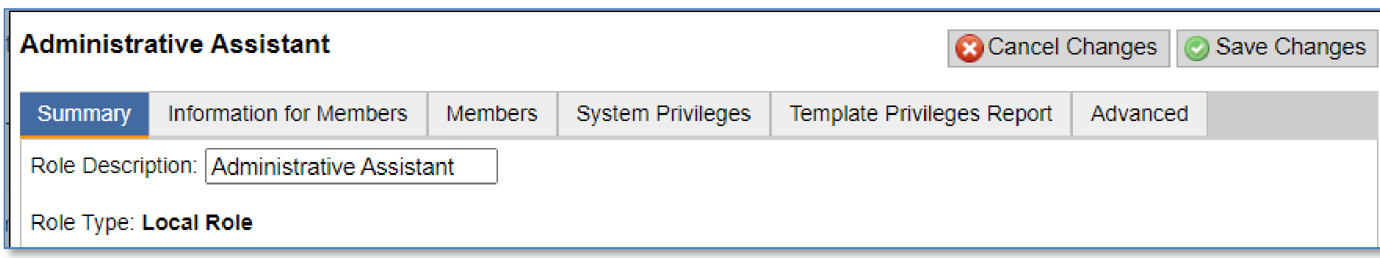
1. Select Role Manager from sidebar, then click Add Role (top right)
2. Provide a description of role, eg: Manager or Administrative Assistant



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



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
.

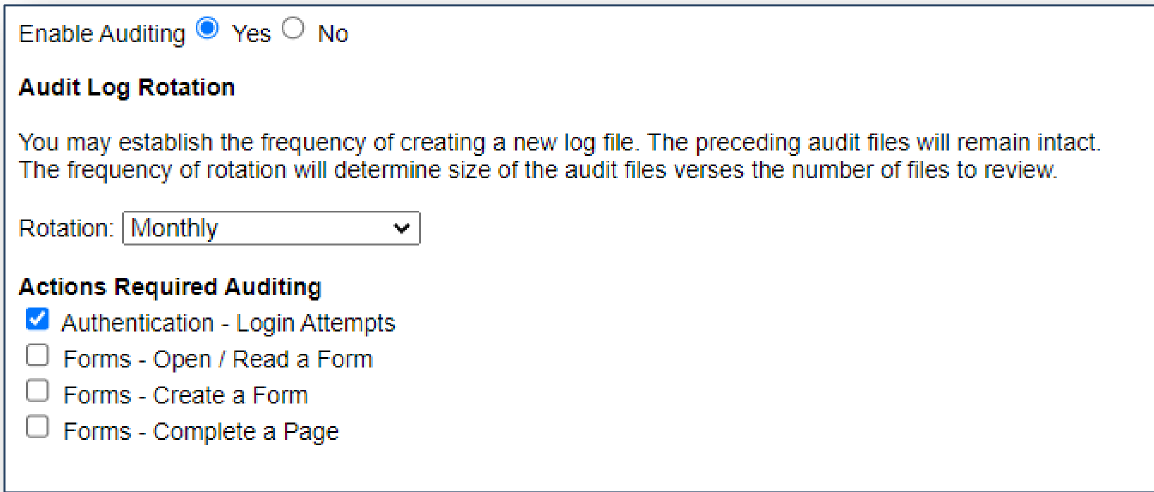
2. Begin choosing your colours by clicking on the corresponding dropdowns.
3. The first logo will replace the KICS logo in the top left hand corner of the screen. Your logo should be no larger than 269 x 40 pixels. Ideally, it should be a white copy of your logo.
4. The second logo will appear on all 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



Email Configuration

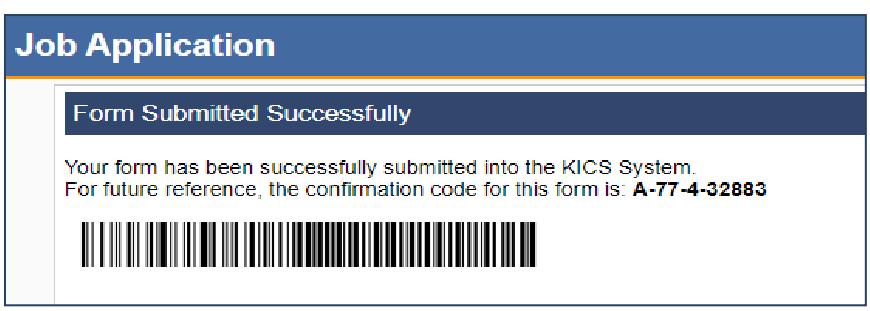
Email Notifications are used throughout KICS for features such as Form Entry Notifications and Password Resets. Contact your Information Technology department for the data required for these fields.

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

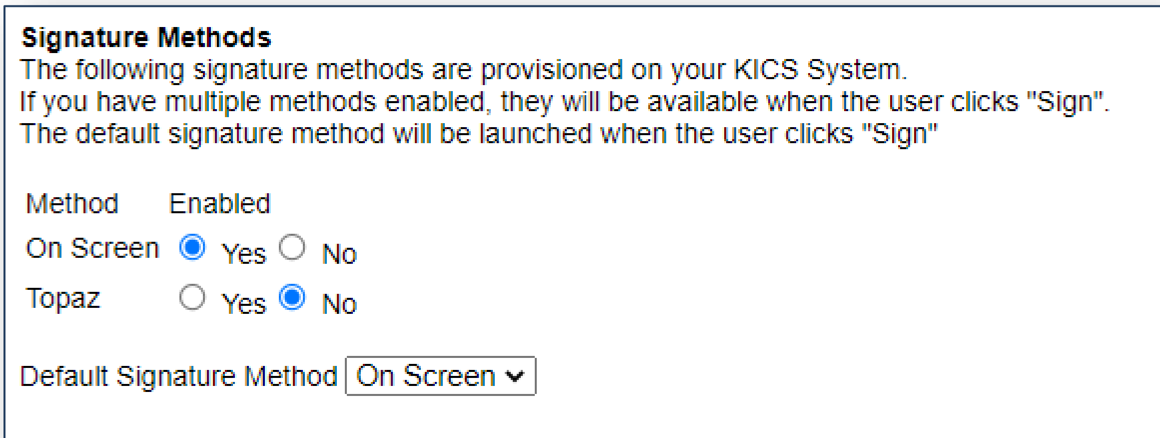
For every form submission there is a unique code that identifies that particular submission. Should you wish a bar code to accompany each submission, you can choose from a 1D barcode (sample below) or a 2D QR code.



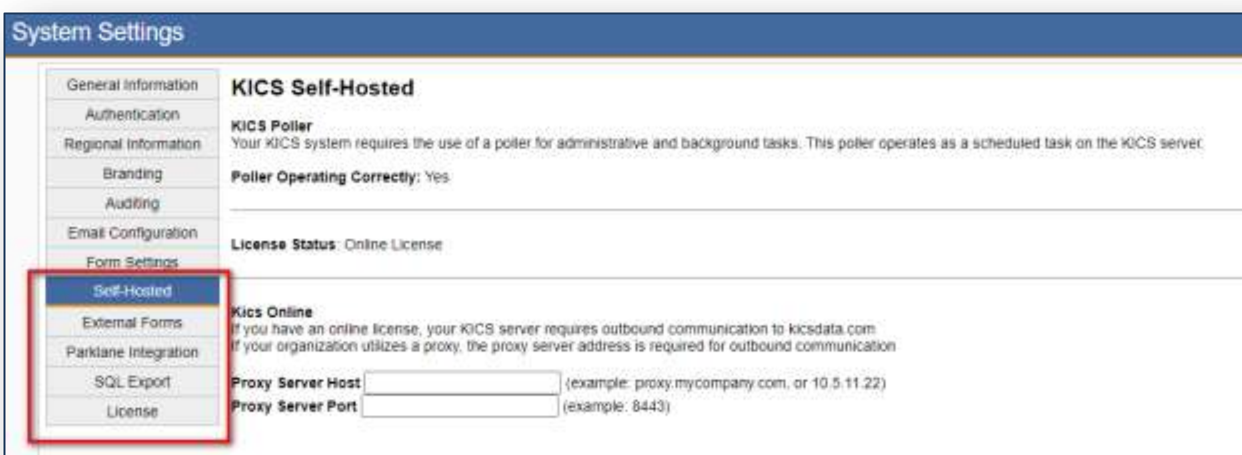
Signature Methods
Signature fields are included in your template questions. In this section you can enable two different signature types.

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.



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.

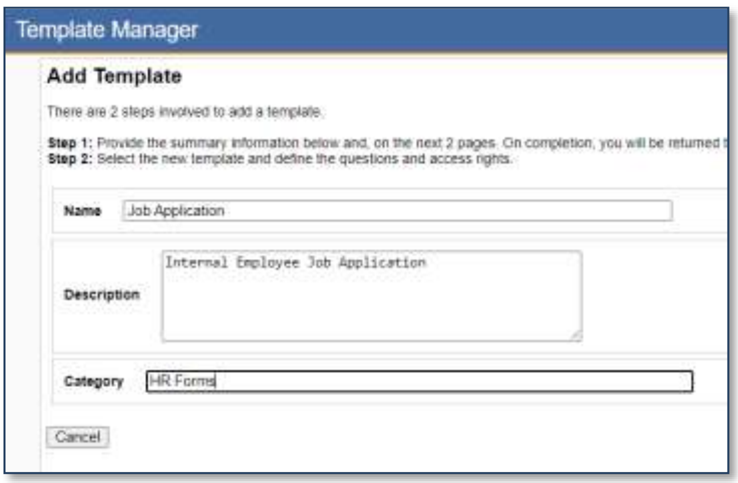


Creating a Form

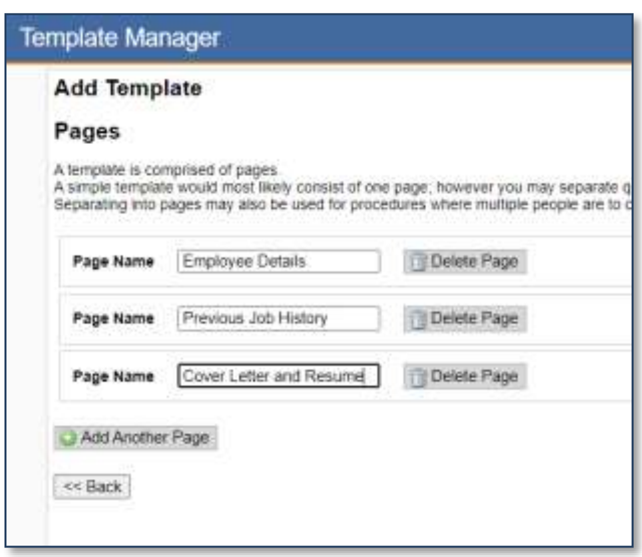
The Template Manager

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)



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



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.

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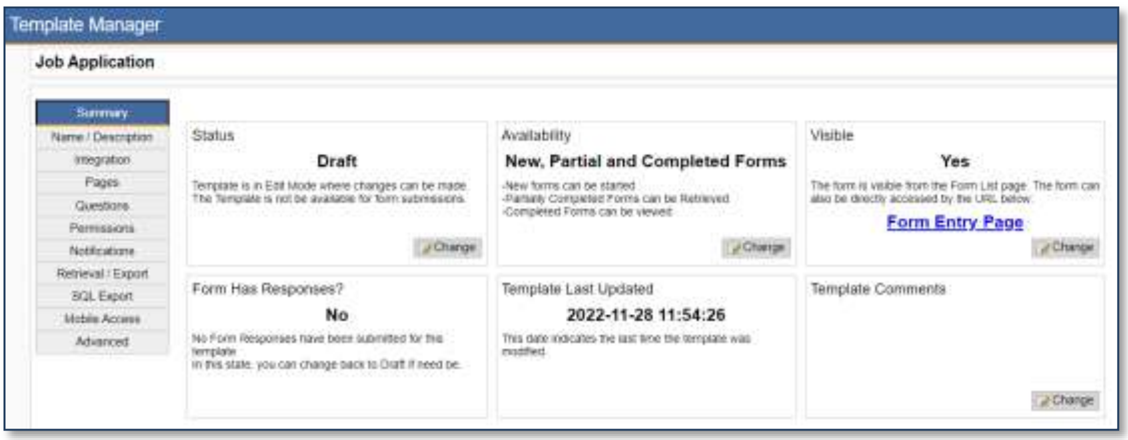


Summary

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

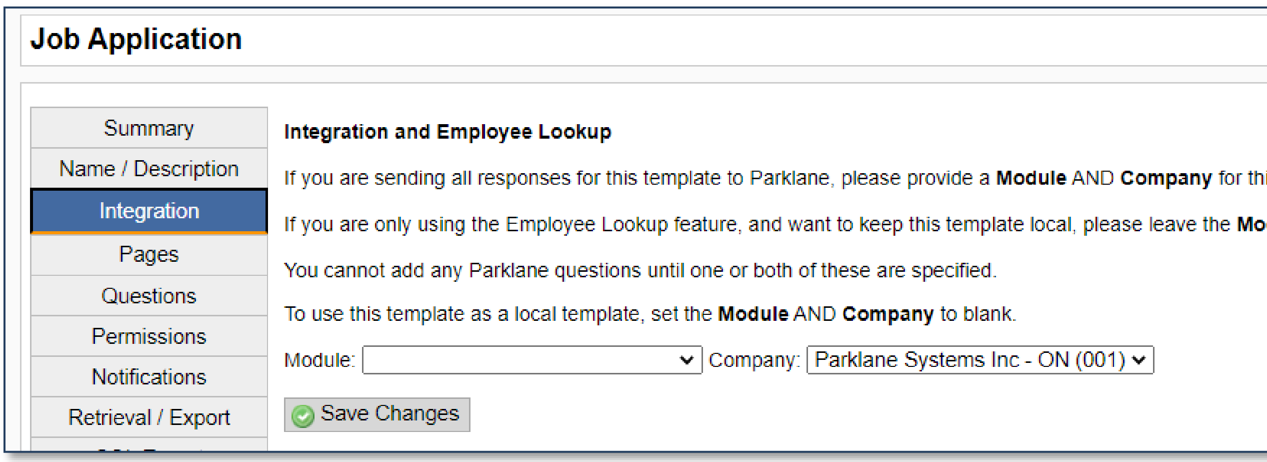
This panel provides the opportunity to edit the name, description and category of your template.

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.



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

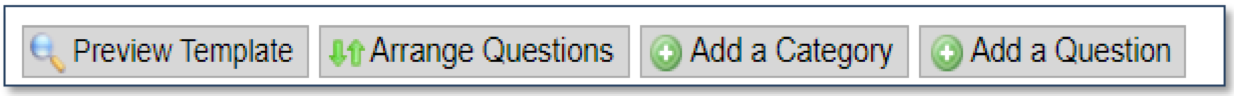
Delete This Template – selecting this option will delete the template. Once selected, the deletion remains "pending" until the system administrator approves the deletion.

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.

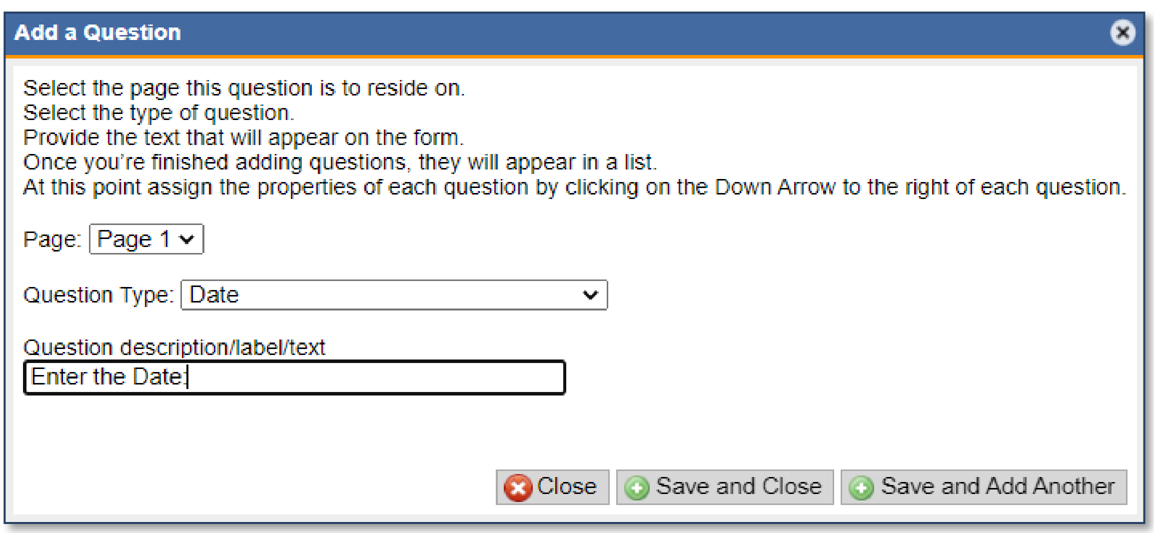


Preview Template – Selecting allows you to view and experience your form (opens in a new tab) before it is published. Any changes or submission made in the preview mode will not be saved and any email notifications will not be delivered.

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.



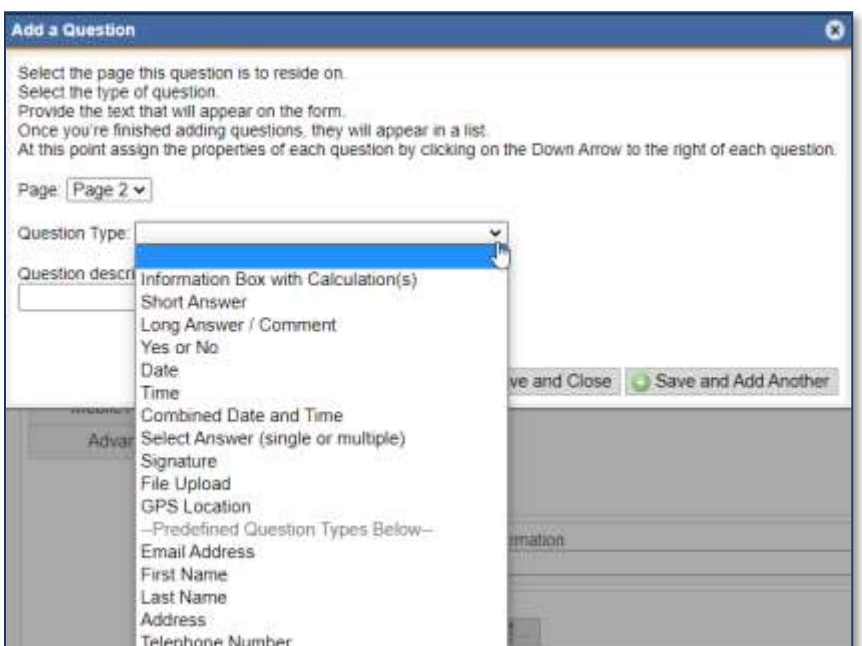
To add a question:

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.



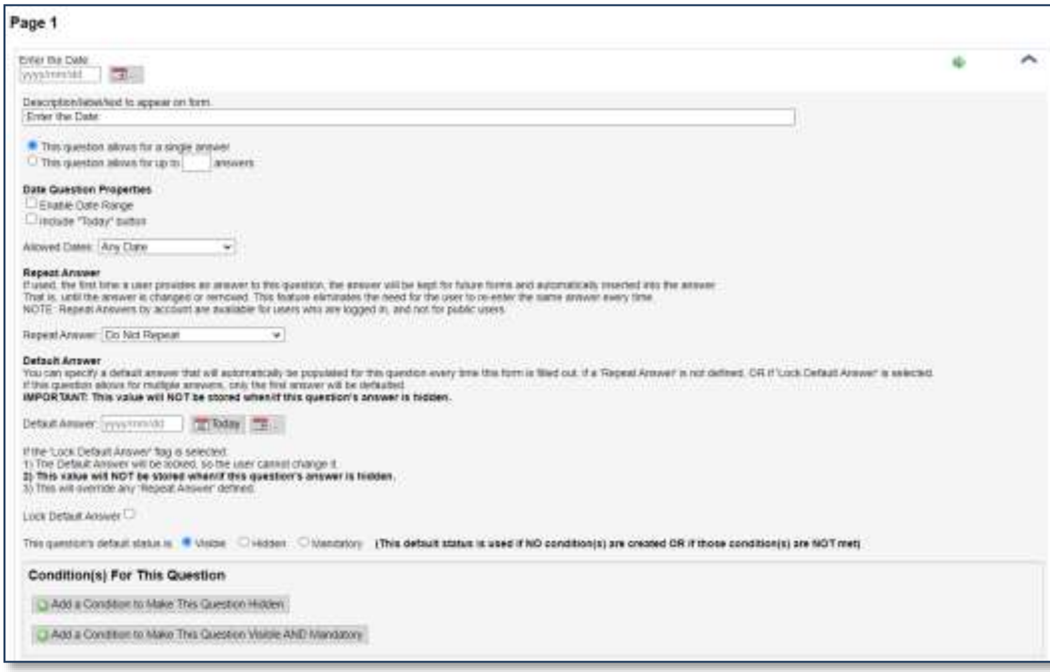
Question Properties

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



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.

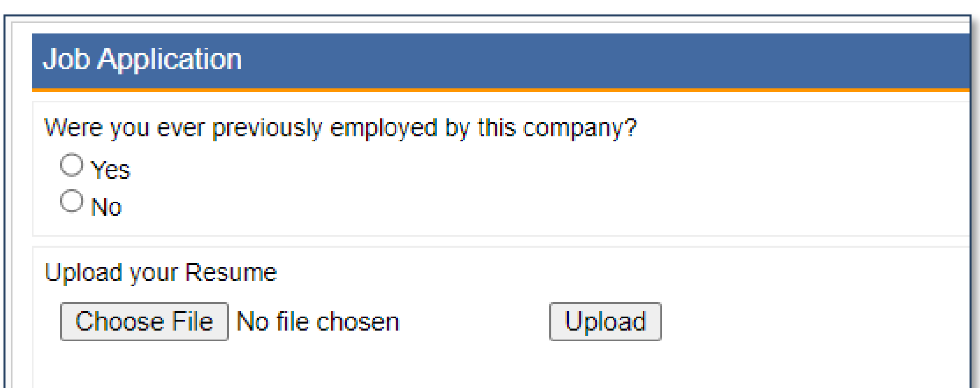
Making a Question Mandatory

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

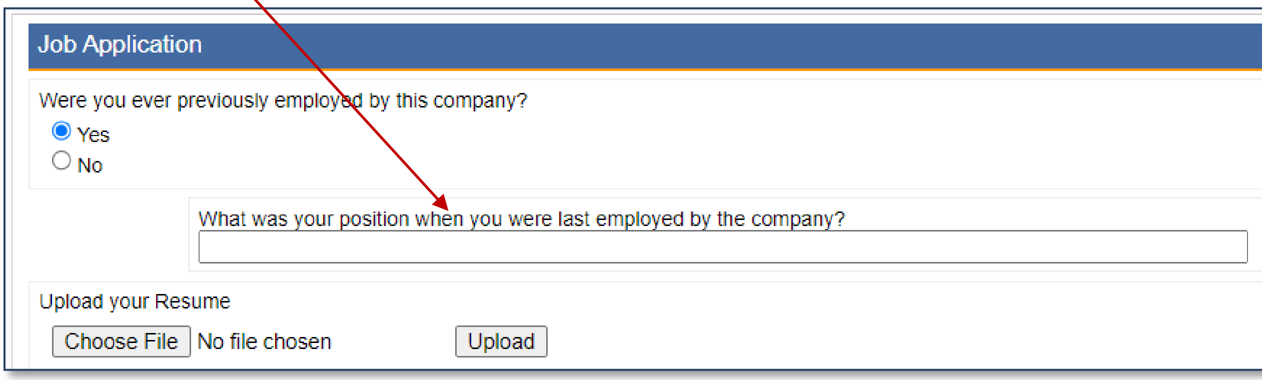
Conditional Questions

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:

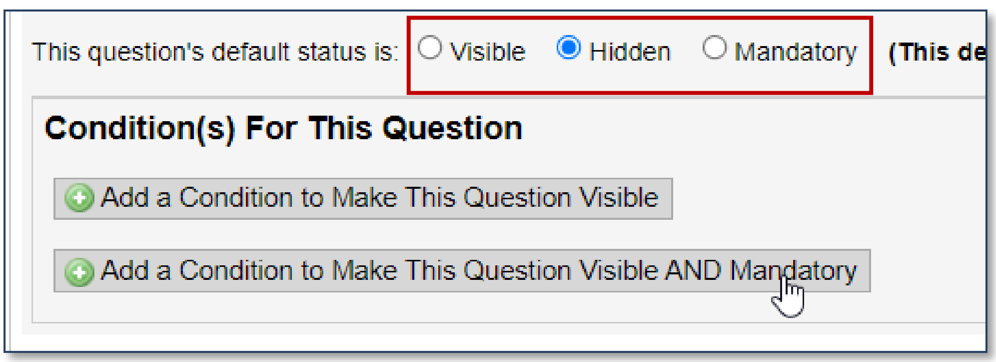


Additional question appears when “Yes” is selected.

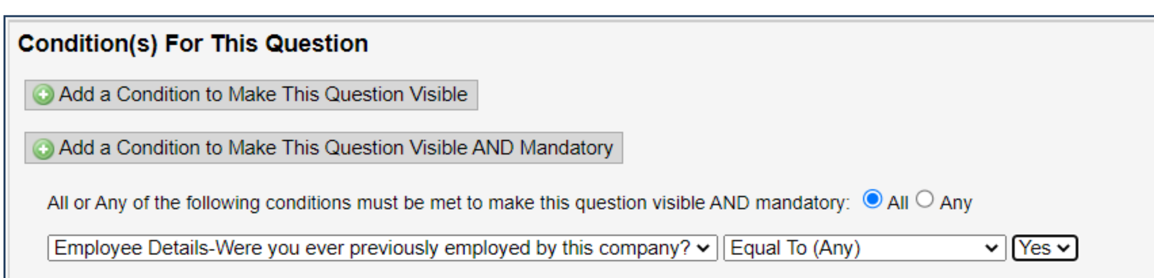


To add a Conditional Question

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.
6. 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.



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.



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

Important note before deleting a question: 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

1. 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

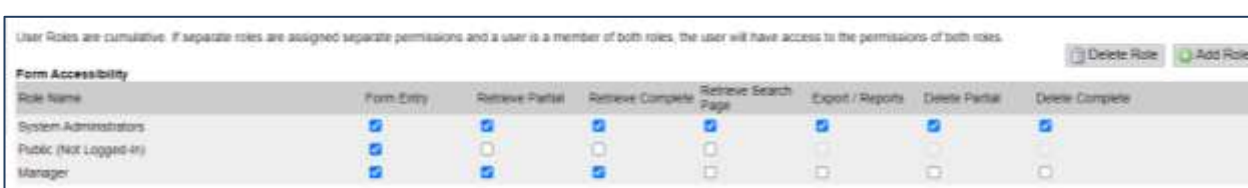
Select "**Delete Role**", choose which role you wish to delete from the drop down, and then click "**Delete Role**". Any User with this role will no longer have access to the completed form.

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. ***Note***: If this is *not* 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. ***Note***: 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.



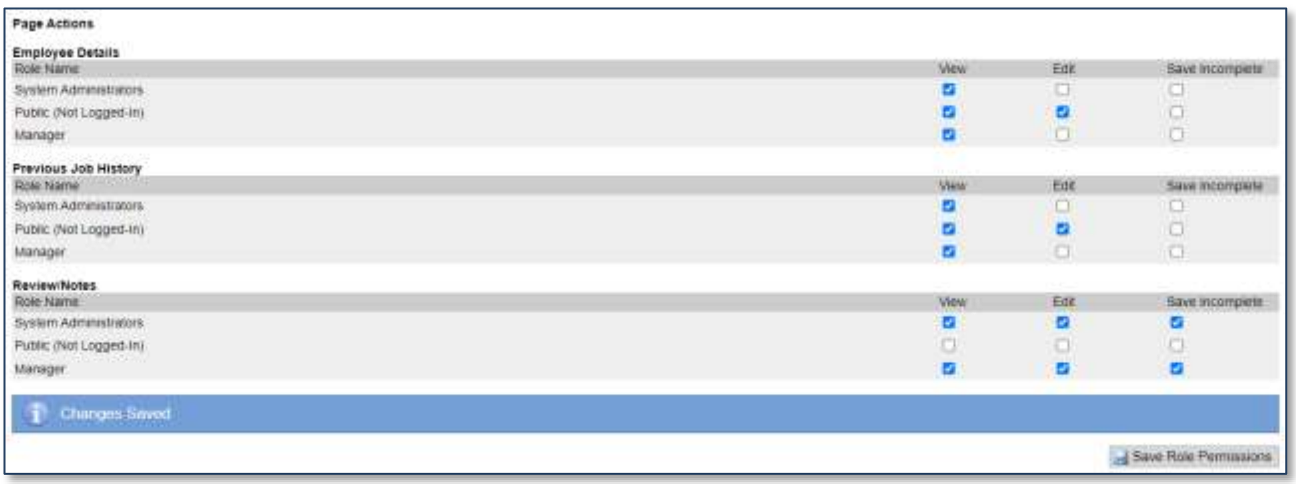
Page Actions

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.



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.

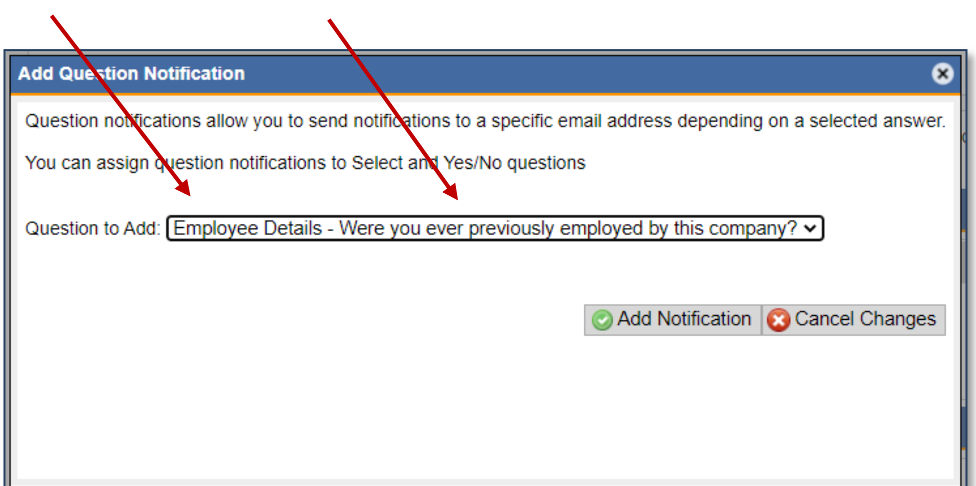
- Email Link - This will include a link to the response in the email. Once clicked, the user(s) will be able to view the responses for the page(s) they have access to.
- Email PDF - This will include a PDF copy of the response in the email. Emails will be sent on a per-page basis when the page reaches 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/Multi-select type questions)

Page – Question on that page



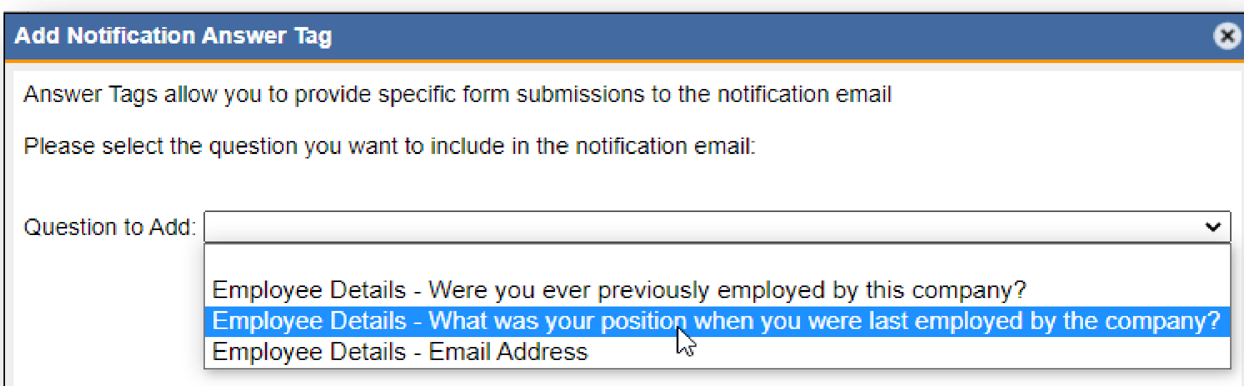
4. After question is chosen, select Add Notification.
5. Choose when the notification is to be sent.

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

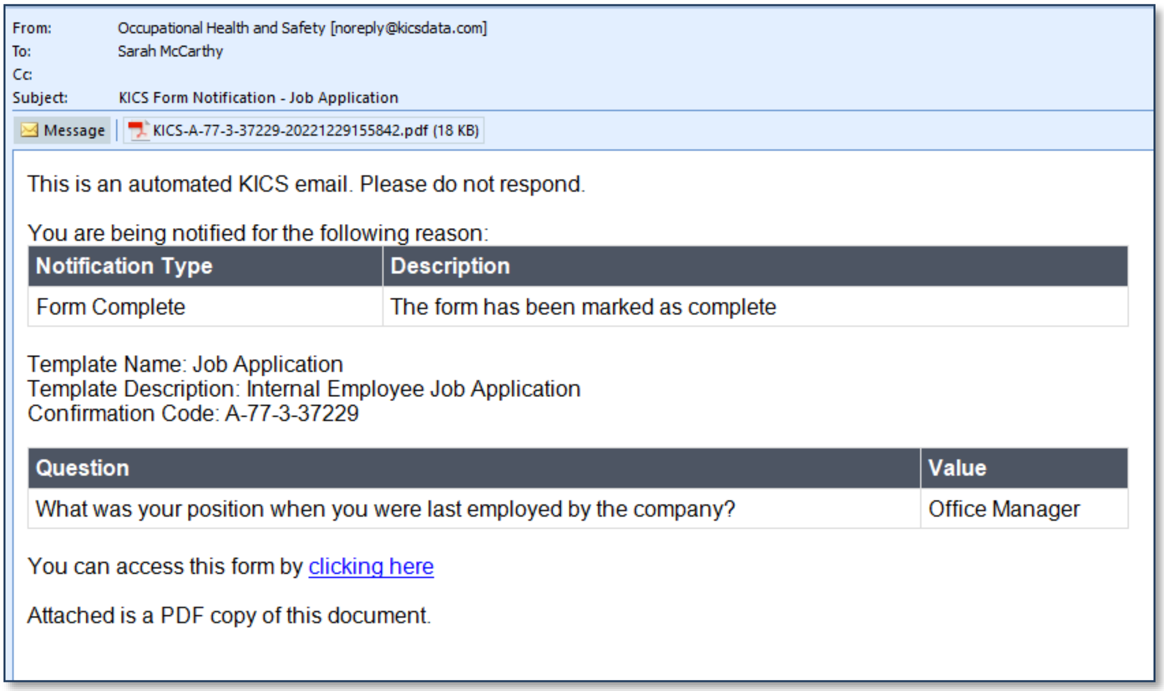
Email Body (Answer Tags)

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.



Sample Notification


From: Occupational Health and Safety [noreply@kicsdata.com]
To: Sarah McCarthy
Cc:
Subject: KICS Form Notification - Job Application

Message | KICS-A-77-3-37229-20221229155842.pdf (18 KB)

This is an automated KICS email. Please do not respond.

You are being notified for the following reason:

Notification Type	Description
Form Complete	The form has been marked as complete

Template Name: Job Application
Template Description: Internal Employee Job Application
Confirmation Code: A-77-3-37229

Question	Value
What was your position when you were last employed by the company?	Office Manager

You can access this form by clicking here

Attached is a PDF copy of this document.

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

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

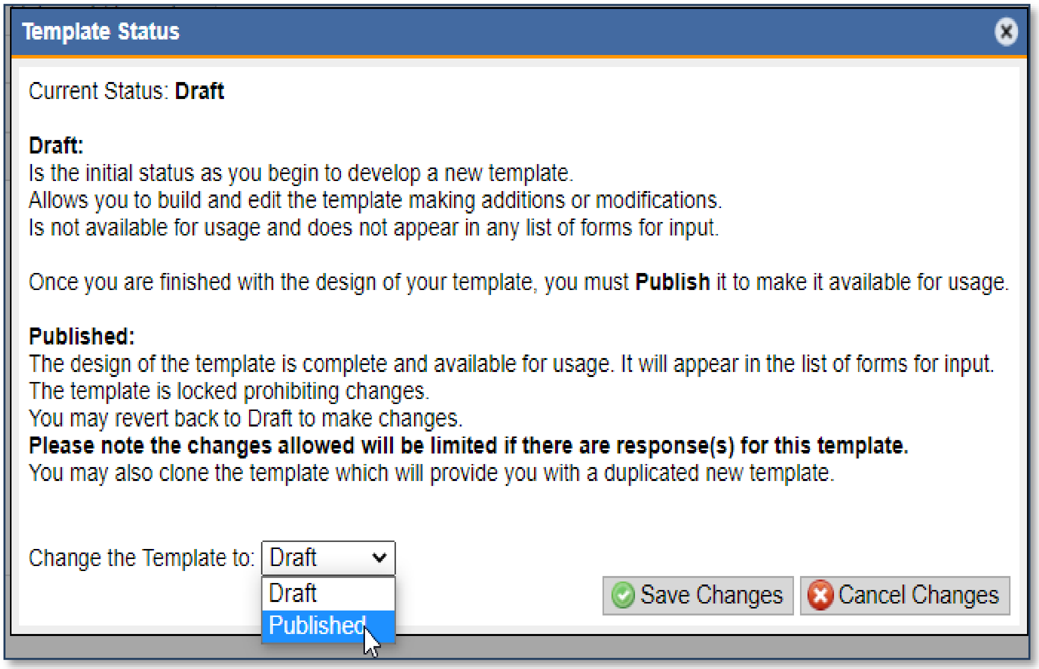
There are three functions available on the Advanced panel of the Template Manager.

- **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.



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.

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

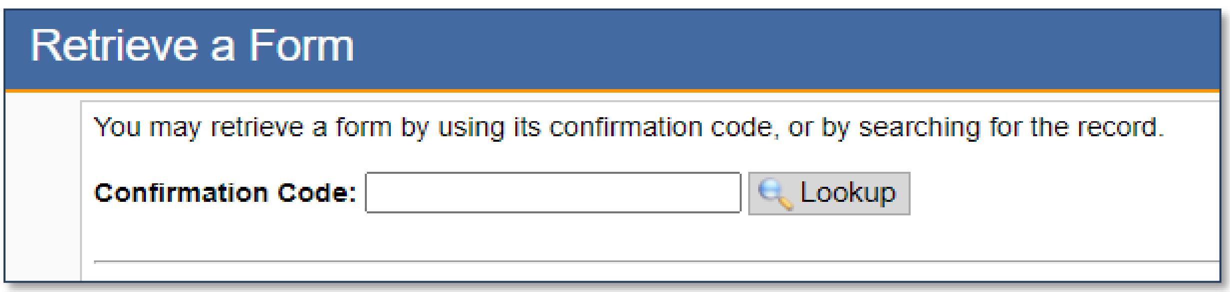
Once a form has been submitted, either partially or completely, you may retrieve the form in multiple ways. A form can be retrieved by confirmation code or by filtering the results by date or field values.

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.

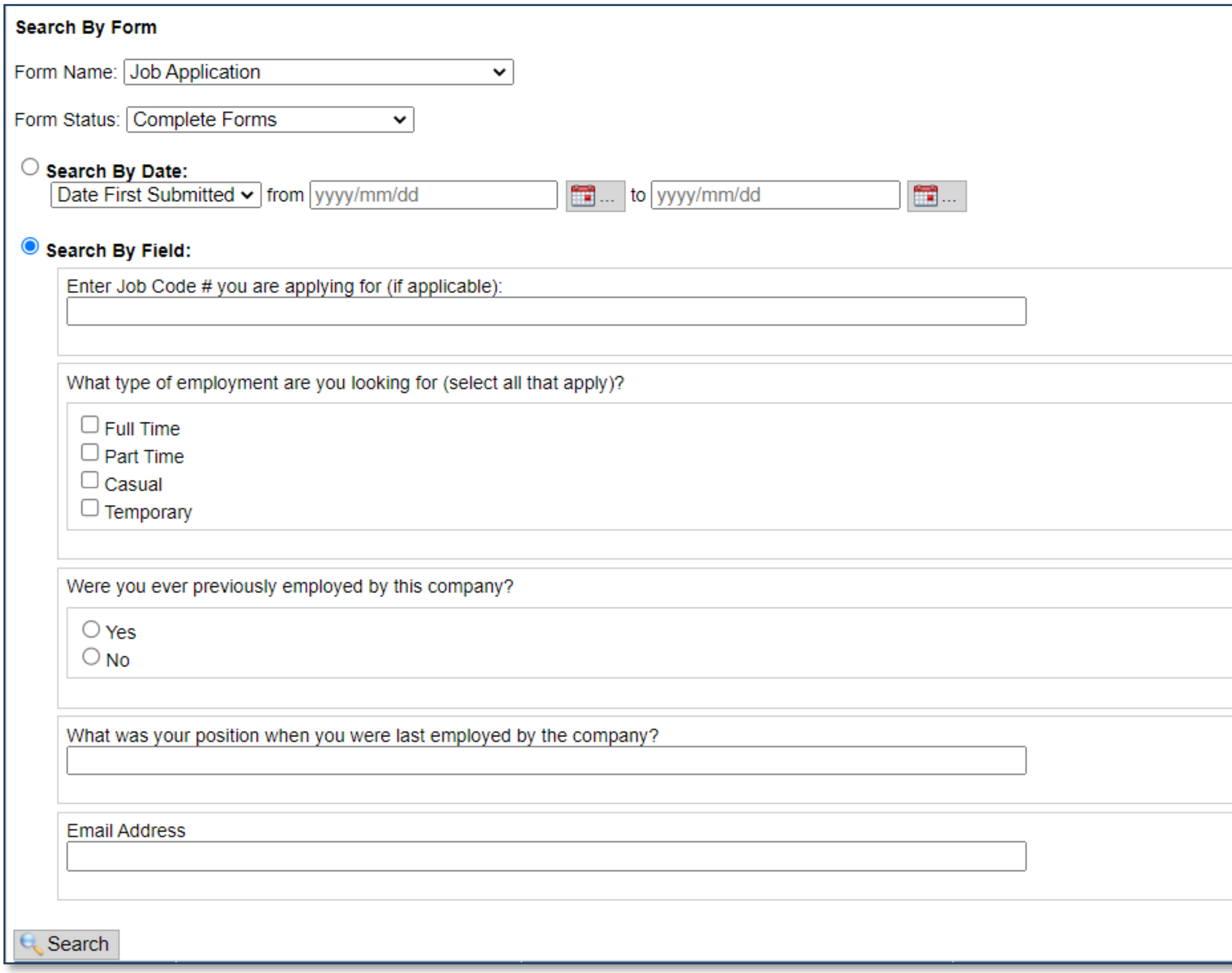


By Form Filters

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

Search By Date:

Date First Submitted from yyyy/mm/dd ... to 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)?

- 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

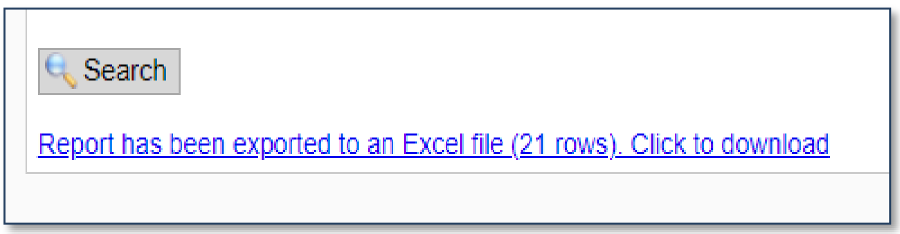
Generate Reports

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.



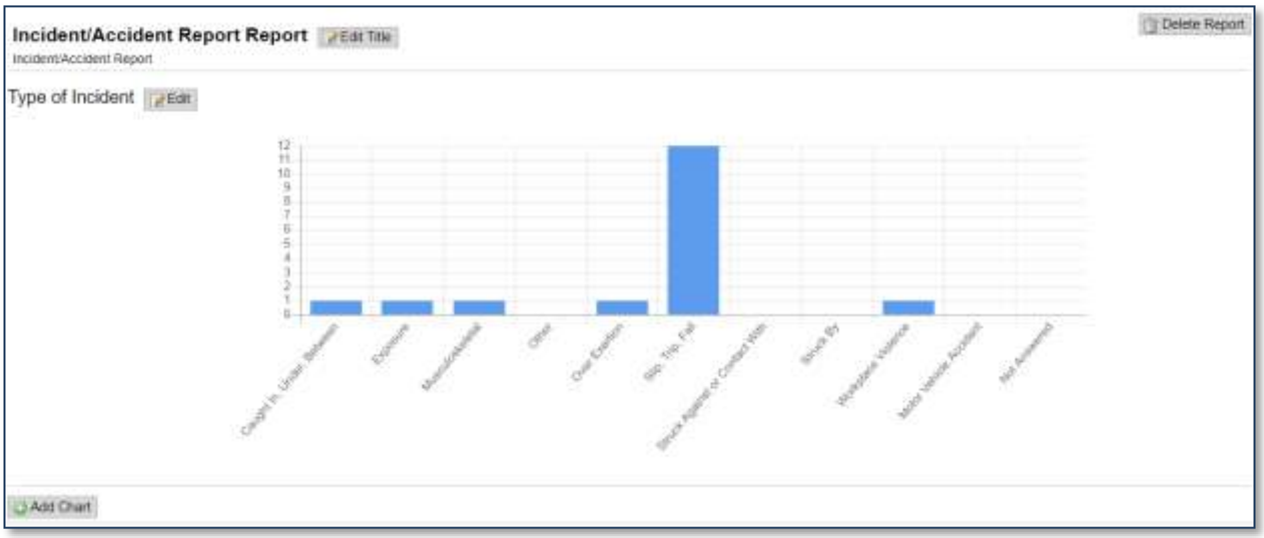
Response Analytics

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

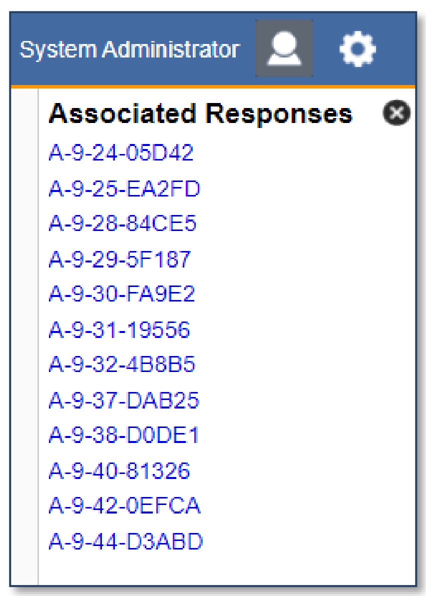
To create a custom report:

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

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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Parklane Systems

10-521 Nottinghill Road

London, ON N6K 4L4

519.657.3386

ContactUs@parklanesys.com

Access the KICS web site for more details about KICS products

www.parklanesys.com