

1. Tag It - How to Tag a Document Ahead of Uploading and Automating it in Kim



If you are not familiar with the term 'tag', then think of it as a way of indicating something that is going to be automated. For example, if you write the word 'date' in a word document, that's just a word. But if we 'tag' it, using the dollar sign and square brackets (i.e. [Date]), then Kim recognises it and changes it from a simple word into an active element (or field if you want the technical term). When Kim sees this in a document, it translates it into a field which prompts Users to enter the necessary information, generate the document, enabling data analysis.

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Open your Word document (letter, record, checklist, compliance form, contract ...).
TIP 1: Before starting to tag make sure that the document is laid out as you want, with your branding and style guide. The document you upload is what an end User will generate and use internally and/or with customers, suppliers and other stakeholders.

Confidentiality Agreement Mutual

This Agreement is made on the date of last signature of this Agreement between:

1. KIM TECHNOLOGIES LIMITED incorporated and registered in England and Wales, registered office: Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG, U.K.
2. [CounterpartyName] whose registered office is at [CounterpartyAddress]

(each a "Party" and together, the "Parties").

BACKGROUND

Each Party wishes to disclose Confidential Information to the other Party in connection with the Purpose. Each Party wants to ensure that the other Party maintains the confidentiality of the Confidential Information. In consideration of the benefits to the Parties of disclosing and receiving the Confidential Information, the Parties have agreed to comply with the following terms in

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Identify all the areas in the document where you need Users to enter data so that they can automatically generate the document. For example - 'Counterparty Name', 'Counterparty Address', 'Date' ...

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2. [CounterpartyName] whose registered office is at [CounterpartyAddress]

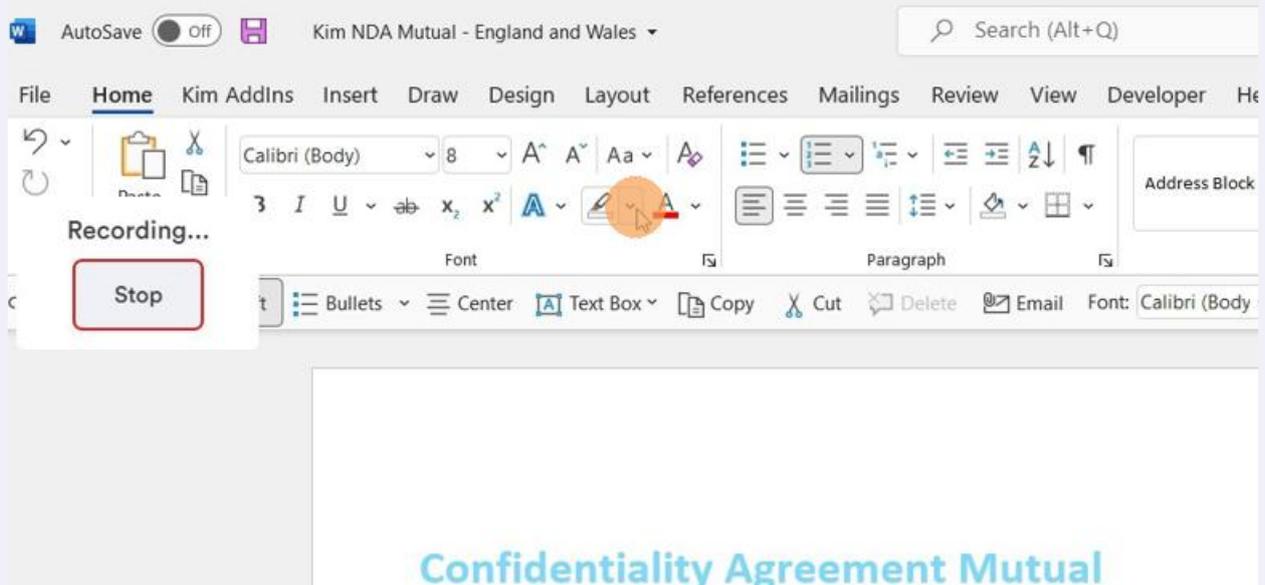
(each a "Party" and together, the "Parties").

BACKGROUND

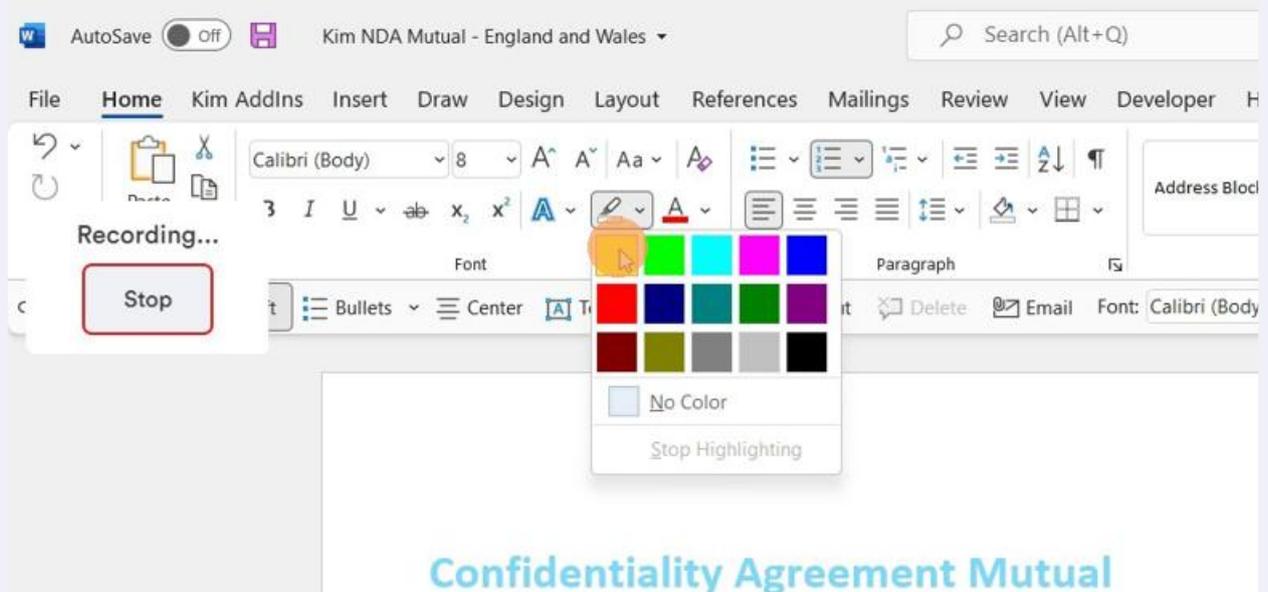
Each Party wishes to disclose Confidential Information to the other Party in connection with the Purpose. Each Party wants to ensure that the other Party maintains the confidentiality of the Confidential Information. In consideration of the benefits to the Parties of disclosing and receiving the Confidential Information, the Parties have agreed to comply with the following terms in

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TIP 2: So that you do not miss any areas (fields) that need tagging, highlight them all before you start to tag (you will remove the highlighting before saving and uploading to Kim Document).



4 To highlight a field, highlight the text, select a colour ...



5 ... and colour all your tag areas (fields) in yellow.

Confidentiality Agreement Mutual

This Agreement is made on the date of last signature of this Agreement between:

1. KIM TECHNOLOGIES LIMITED incorporated and registered in England and Wales with company number 09687973 w Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG, United Kingdom; and
2. [SCounterpartyName] whose registered office is at [SCounterpartyAddress]

(each a "Party" and together, the "Parties").

BACKGROUND

Each Party wishes to disclose Confidential Information to the other Party in connection with the Purpose. Each Party wants to ensure that the other Party maintains the confidentiality of the Confidential Information. In consideration of the benefits to the Parties of disclosing and receiving the Confidential Information, the Parties have agreed to comply with the following terms in

- a) is or becomes generally available to its disclosure by the Recipient or its Agreement);
- b) was available to the Recipient on disclosure by the Disclosing Party;
- c) was. is or becomes available to the Re

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Make sure that you highlight all tag areas. Apart from identifying all fields this process will also help you to see where the same field appears multiple times (e.g. Date). Doing this will make your tagging process easier and quicker.

For and behalf of KIM TECHNOLOGIES LIMITED

Job Title: [SKimJobTitle]

Name: [SKimSignatoryName]

Signature:

Date: [SDate]

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TIP 3: Before starting to tag, review your document and make a note of where the same data is entered multiple times. Start to tag!

Confidentiality Agreement Mutual

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1. KIM TECHNOLOGIES LIMITED incorporated and registered in England and Wales, registered office: Central Boulevard, Blythe Valley Park, Solihull, West Midlands, B90 8BG, U.K.
2. I [SCounterpartyName] whose registered office is at [SCounterpartyAddress]

(each a "Party" and together, the "Parties").

BACKGROUND

Each Party wishes to disclose Confidential Information to the other Party in connection with the Purpose. Each Party wants to ensure that the other Party maintains the confidentiality of the Confidential Information. In consideration of the benefits to the Parties of disclosing and receiving the Confidential Information, the Parties have agreed to comply with the following terms in

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To tag a field you use the same format - [TagName]. For example, [CounterpartyName] or [CounterpartyAddress]. TIP 4: Make sure that are no spaces in the tags you create.

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2. [CounterpartyName] whose registered office is at [CounterpartyAddress].

(each a "Party" and together, the "Parties").

BACKGROUND

Each Party wishes to disclose Confidential Information to the other Party in connection with the Purpose. Each Party wants to ensure that the other Party maintains the confidentiality of the Confidential Information. In consideration of the benefits to the Parties of disclosing and receiving the Confidential Information, the Parties have agreed to comply with the following terms in

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TIP 5: Tags must be named differently for each unique field. For example, imagine you have two addresses, 'your address' and the 'counterparty address'. You need different tags - [OurAddress], [CounterpartyAddress] - to capture these individual addresses.

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2. [CounterpartyName] whose registered office is at [CounterpartyAddress].

(each a "Party" and together, the "Parties").

BACKGROUND

Each Party wishes to disclose Confidential Information to the other Party in connection with the Purpose. Each Party wants to ensure that the other Party maintains the confidentiality of the Confidential Information. In consideration of the benefits to the Parties of disclosing and receiving the Confidential Information, the Parties have agreed to comply with the following terms in

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Another example covers dates. You may have 'Date of Signature' and 'Effective Date'. You cannot use [\$Date] to capture these two items. You need [\$DateOfSignature] and '[\$EffectiveDate].

ment Mutual

signature of this Agreement between:

incorporated and registered in England and Wales with company number 09687973 whose registered office is at One Park, Solihull, West Midlands, B90 8BG, United Kingdom; and registered office is at [SCounterpartyAddress]

Information to the other Party in order to ensure that the other Party does not disclose Confidential Information. In consideration of the Disclosing Party providing and receiving the Confidential Information, the other Party shall comply with the following terms in relation to Confidential Information.

- a) is or becomes generally available to the public (other than as a result of its disclosure by the Recipient or its Representatives in breach of this Agreement);
- b) was available to the Recipient on a non-confidential basis prior to disclosure by the Disclosing Party;
- c) was, is or becomes available to the Recipient on a non-confidential basis from a person who, to the Recipient's knowledge, is not bound by a confidentiality agreement with the Disclosing Party or otherwise

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Of course, you may have areas where the same data is being captured, for example 'Counterparty Address'. If 'Counterparty Address' appears in four places copy the same tag ([SCounterpartyAddress]) into the four fields. By doing this a User can enter these details once and they will appear in all four places in your document.

ment Mutual

signature of this Agreement between:

incorporated and registered in England and Wales with company number 09687973 whose registered office is at One Park, Solihull, West Midlands, B90 8BG, United Kingdom; and registered office is at [SCounterpartyAddress]

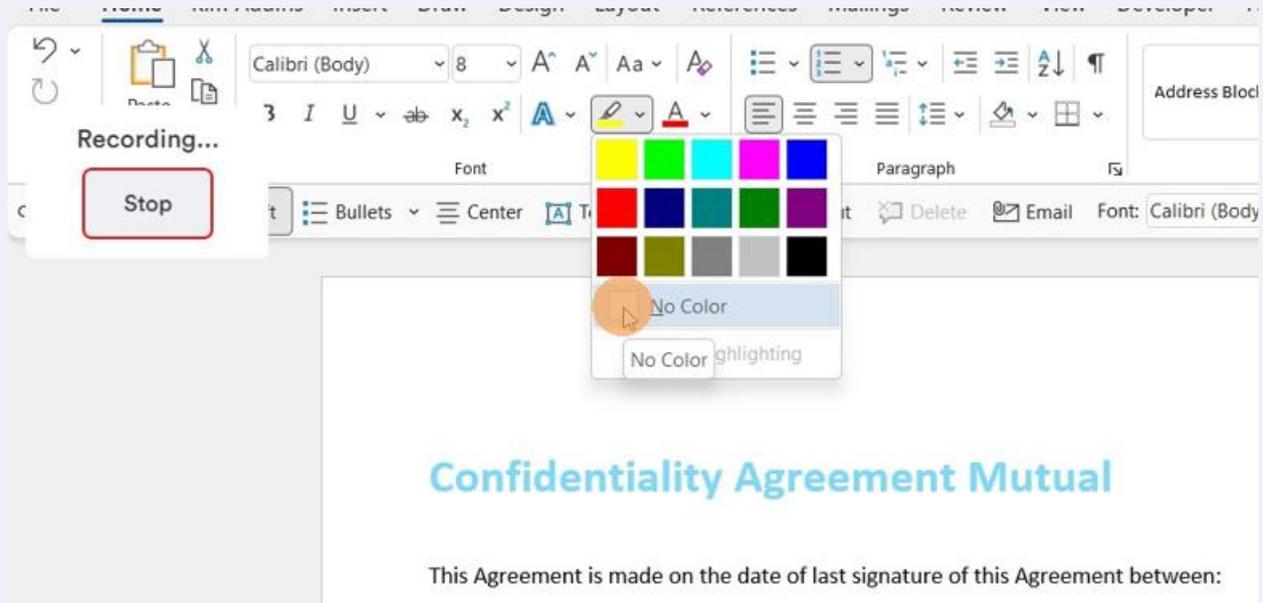
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- b) was available to the Recipient on a non-confidential basis prior to disclosure by the Disclosing Party;
- c) was, is or becomes available to the Recipient on a non-confidential basis from a person who, to the Recipient's knowledge, is not bound by a confidentiality agreement with the Disclosing Party or otherwise

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Having finished tagging the document, make sure that you remove all highlighting. If you leave the highlighting in, the fields will be highlighted in the final document!



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Save the document. You are now ready to upload the document to Kim. See our module '2. Upload It - How To Upload a Document to Kim'

