



AUTOMATION SERVICES BRIEF

Below is a guide to providing Thomson Reuters with an efficient and accurate brief on documents for automation. Following the recommendations below will ensure that Customers have key points of input into the design of the automated document, allows for accurate automation by TR, and allows for faster progression through the automation process. The below method also ensures that information is efficiently communicated between TR and the Customer and ensures a clear and easy to follow dialogue throughout the project.

Base Documentation

To ensure a high quality end product the base document should be in the best condition possible:

- Content – The precedent should be as full as possible & contain up to date language.
- Styles – House styles should be applied throughout the document.
- Auto-Numbering – Should be applied consistently throughout the document.
- References – All foot-notes and cross references should be up to date.

Delivering the Brief

Two key elements provide the best basis for delivery of an automated document, mark up of the base document, and a clear questionnaire:

Providing the questionnaire

We recommend providing the content of the questionnaire to us in the following format, for example:

No	Question	Options	Guidance	Context
	<i>This should state what the question asked will be.</i>	<i>If there are options given for a question, these should be stated in this column.</i>	<i>If you would like to add guidance or drafting notes for the benefit of the user in the questionnaire, add in this column</i>	<i>When the questions should be asked</i>
1	Select the type of NDA you require:	Mutual Unilateral		Always used
2	Enter the name of the other party:		Please enter the full legal name of the party, for example "Thomson Reuters Limited"	Always used
3	Is the other party an individual or a corporate entity?	Individual Entity		Always used
4	What is the company number?			If Q3 is Entity.



Marking up the document

We recommend that you use Word comments to indicate in the Document where the automation should be applied. This also allows for effective communication of any complex parts of the document.

Corboda

CORBODA
[MUTUAL][UNILATERAL] OUTGOING
NON DISCLOSURE AGREEMENT

This [mutual][unilateral] non disclosure agreement ("Agreement") is entered into as of the last date signed by the parties below ("Effective Date").

As between Corboda, Inc., a California corporation having its principal place of business at 1 Corboda Drive, Santa Clara, CA, 95040, USA including all of its subsidiaries ("Corboda"), and [Other Party Name], with its principal place of business at [Other Party Address] ("Company"). Both parties agree that any disclosed Confidential Information, as defined below, provided by the disclosing Party, (as "Owner"), to the receiving Party, (as "Recipient"), for the limited purpose stated herein (the "Purpose"), shall be treated in accordance with the following provisions:

TA **Turner, Anna L. (Legal)**
Answer to Q1. Apply throughout the document.

TA **Turner, Anna L. (Legal)**
Answer to Q2. Apply throughout the document.

TA **Turner, Anna L. (Legal)**
Only if the Other Party is an Entity.

Automation Process:

To automate a document to a high standard requires a process of review and revision, the following steps will be carried out to ensure that the end result meets your expectations:

1. **Project Start**
 - a. Customer delivers over Brief as specified above.
 - b. Initial review by TR of work involved.
2. **Kick off Call:**
 - a. Discussion of document and any complex areas, chance to ask any questions
 - b. Set out dates for next steps.
3. **Automation**
 - a. TR initial automation of document
 - b. Internal TR testing of template questionnaire behaviour and outputs
 - c. Apply any corrections needed as a result of the testing.
4. **Customer Initial Review**
 - a. Document is made available for customer to review
 - b. Customer provides feedback on questionnaire, functionality and if spotted any errors
5. **(Second round for more complex documents)**
 - a. For more complex documents steps 3 and 4 may need to be repeated to ensure desired output
 - b. This may also bring in broader user testing by the customer
6. **TR Final Review**
 - a. TR to update agreement based on customer feedback
7. **Document released to user**
 - a. The automated document is delivered to the customer and if applicable uploaded to their chosen deployment for use