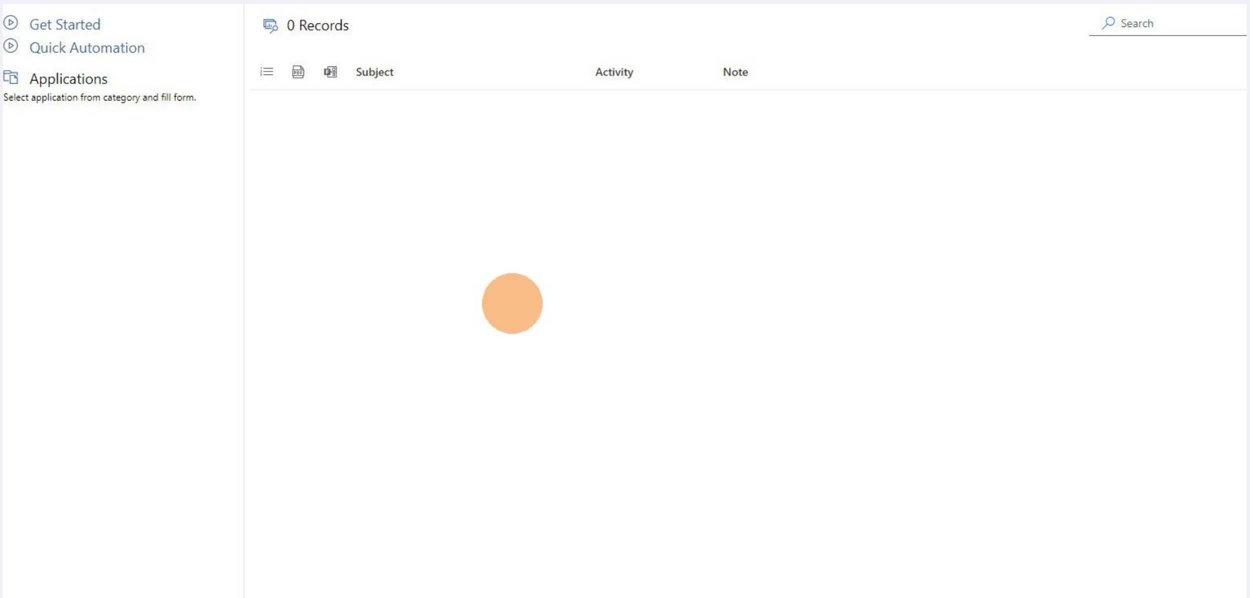
2. Upload it - How to Upload a Document, Create an Application Category (Menu Item) and Create an 'Audience' (Who Has the Rights to Use a Document).

Having tagged your document (see 1. Tag It - How Tag A Document', this step-by-step shows you how to upload a document to Kim. It shows you how to create the 'Applications' (menu) that Users can select from. It also shows you how to create an 'Audience' (the people who have the rights to use the document').

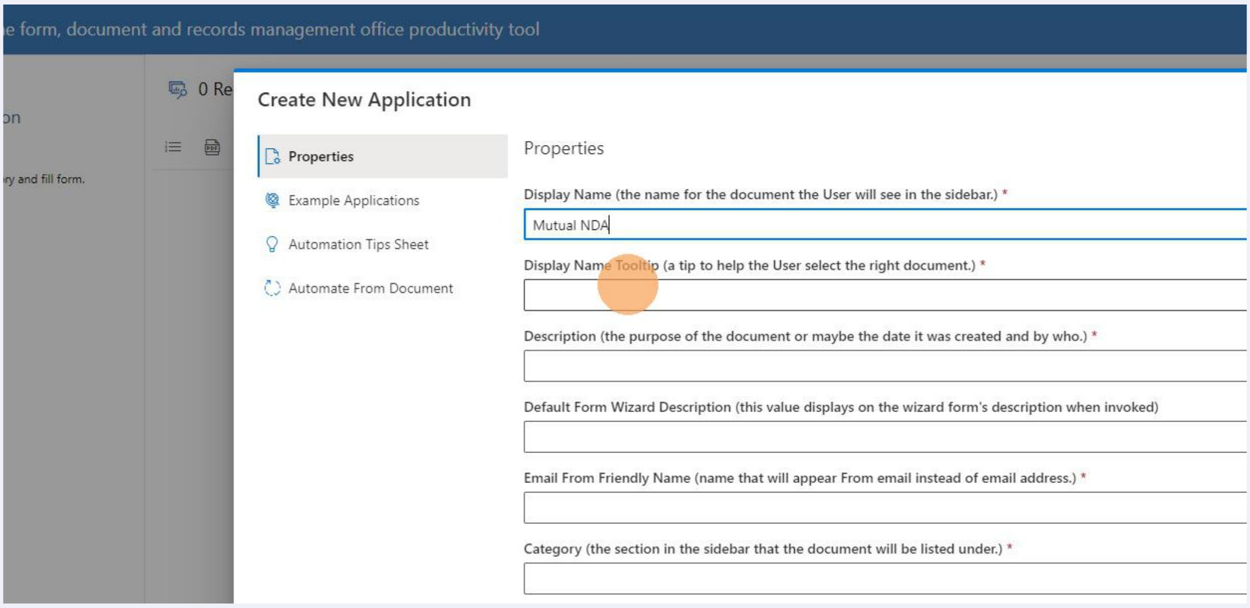
1

When you initially access Kim to upload your first document you will see the following screen with (i) no 'Applications' in the left-hand menu and (ii) no 'Records' in the workspace. Both 'applications' and 'Records' will populate as you use Kim.



2 To upload the document you have previously tagged (see 1. Tag it - How to Tag a Document') select 'Create Application'.

3 A dialog box will appear that allows you to capture the details relating to the document that you will be uploading. TIP 1: Choose your language carefully because it will appear in menus and email subject headers. Think about the language from a Users perspective.



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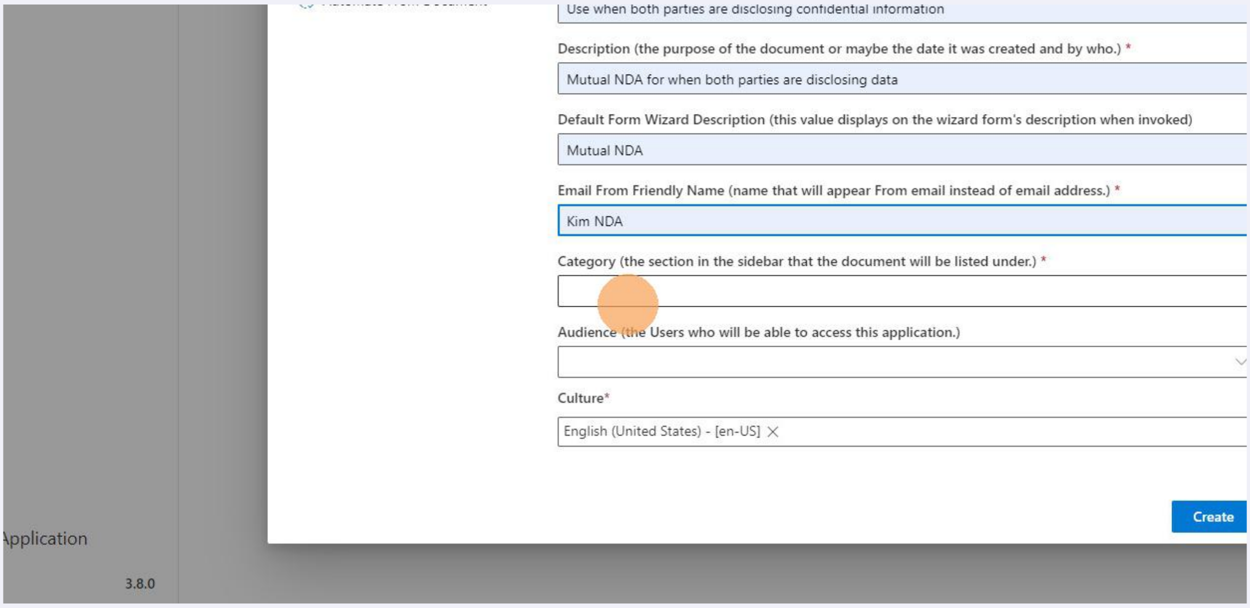
Continue to complete the fields. When you reach the 'Category' field, please note that this is the heading that will appear in the left-hand menu for Users to select from. TIP 2: If there are already Categories in the left-hand menu you can select to add this new document to an existing 'Category'. Because this is first time access we need to add the first 'Category'.



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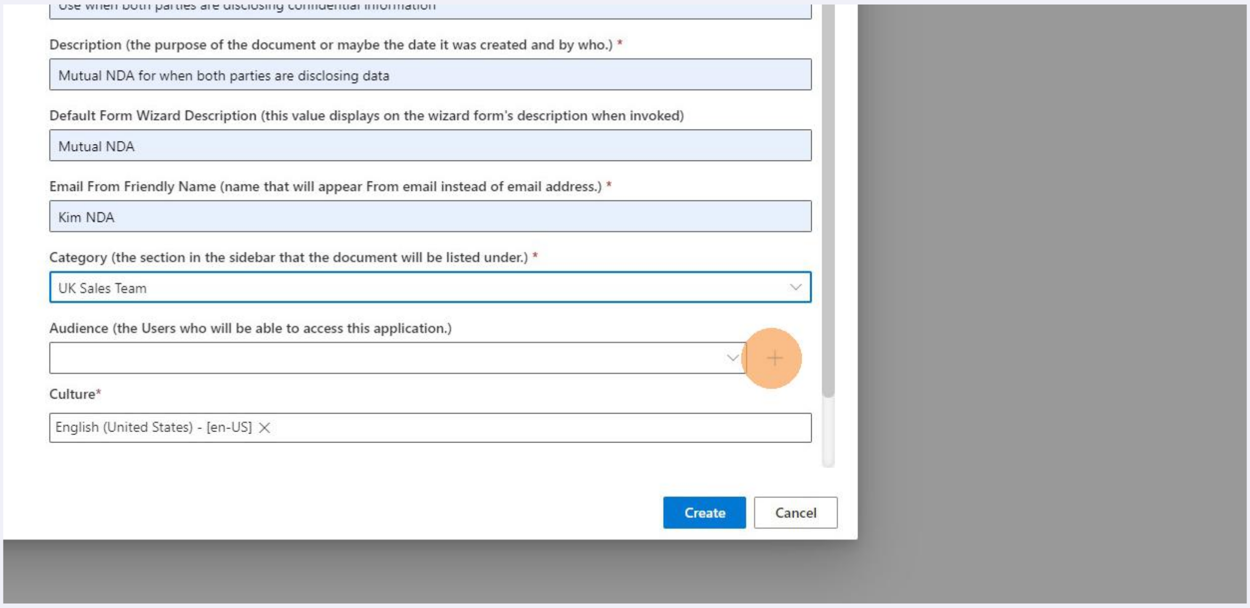
The document we are uploading is a Mutual NDA for the UK Sales Team to use. In Category' add 'UK Sales Team'. When you save, 'UK Sales Team' will appear in the left-hand menu and, when selected by a member of the UK Sales Team, 'NDA Mutual' will appear. TIP 3: If your next document is an 'Order Form' or 'Proposal Template' for the 'UK Sales Team', you will save to this 'Category' and they will appear under the 'UK Sales Team' Application heading. Now select 'Audience' and the '+'.



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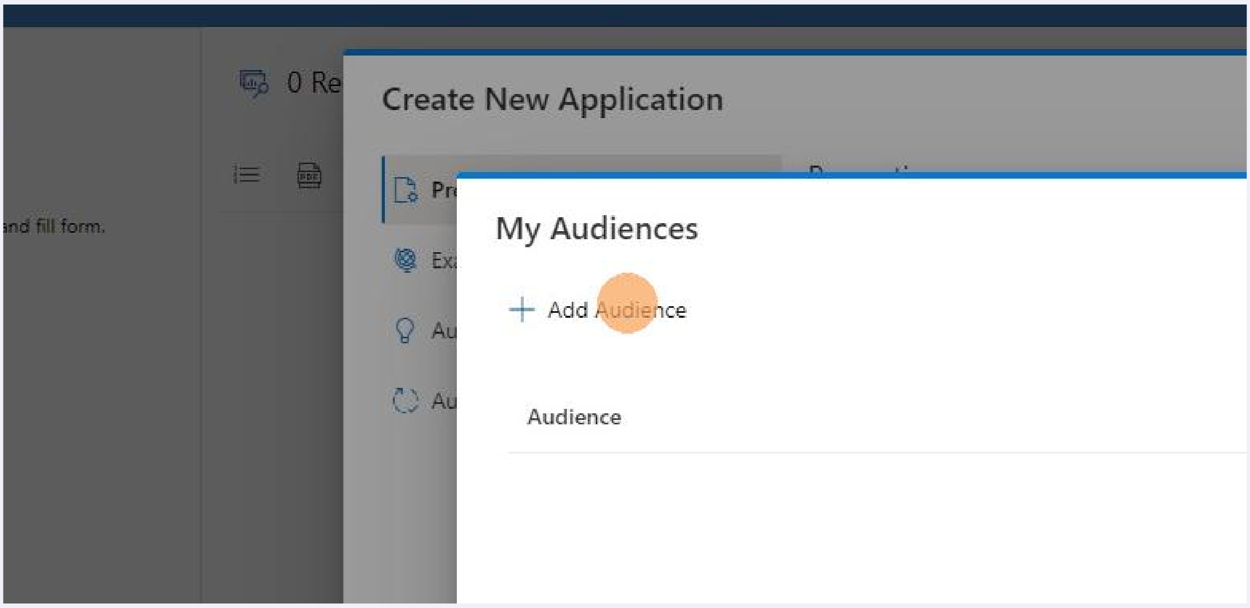
This is where you will select the 'Audience' that will be able to see the document you are uploading. Because there are no audiences to select from yet, we need to add ' UK Sales Team' as an 'Audience'. Click '+ Audience'. TIP 4: If you have previously set up audiences, and you want to allow the document you are uploading to be viewed by an existing 'Audience', you will be able to select it from the drop down list.



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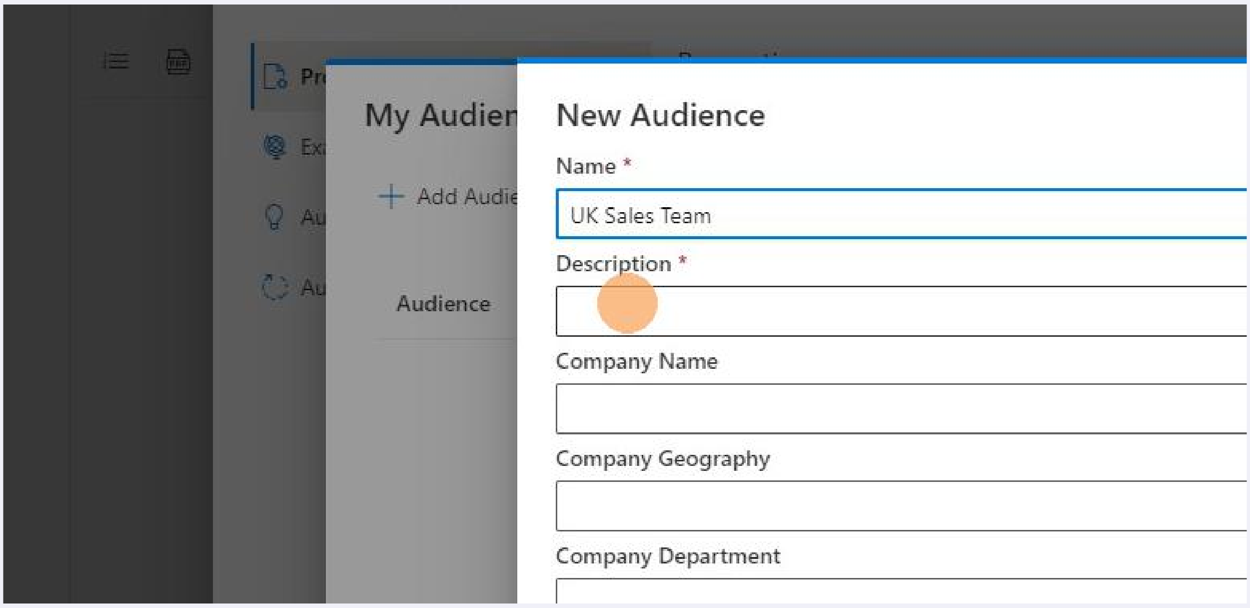
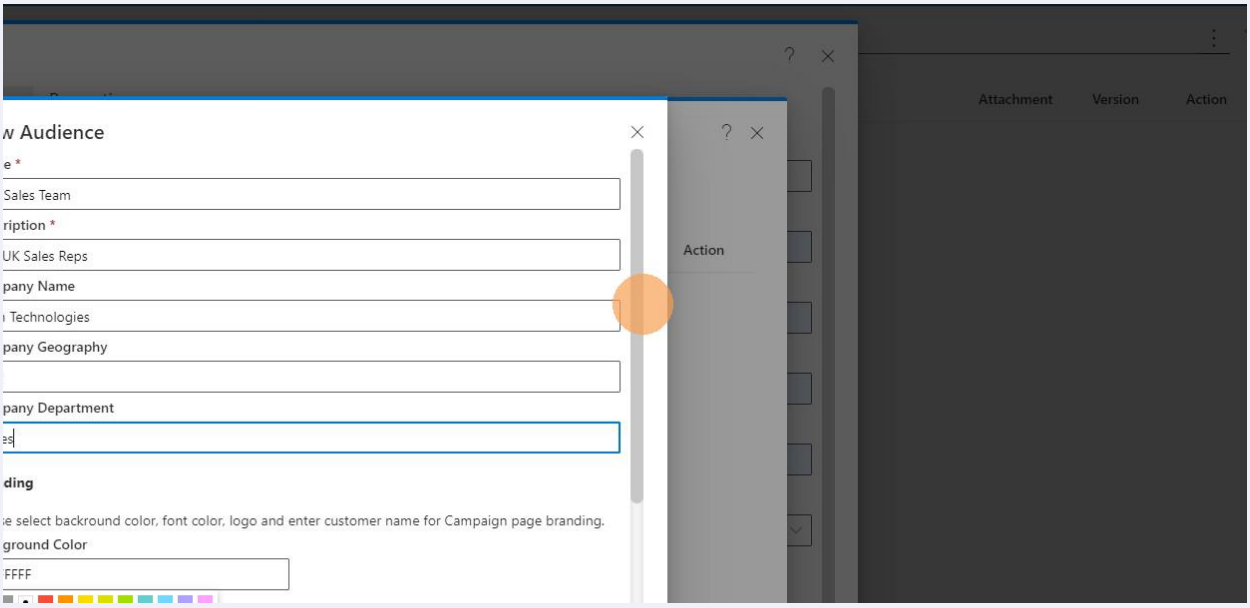
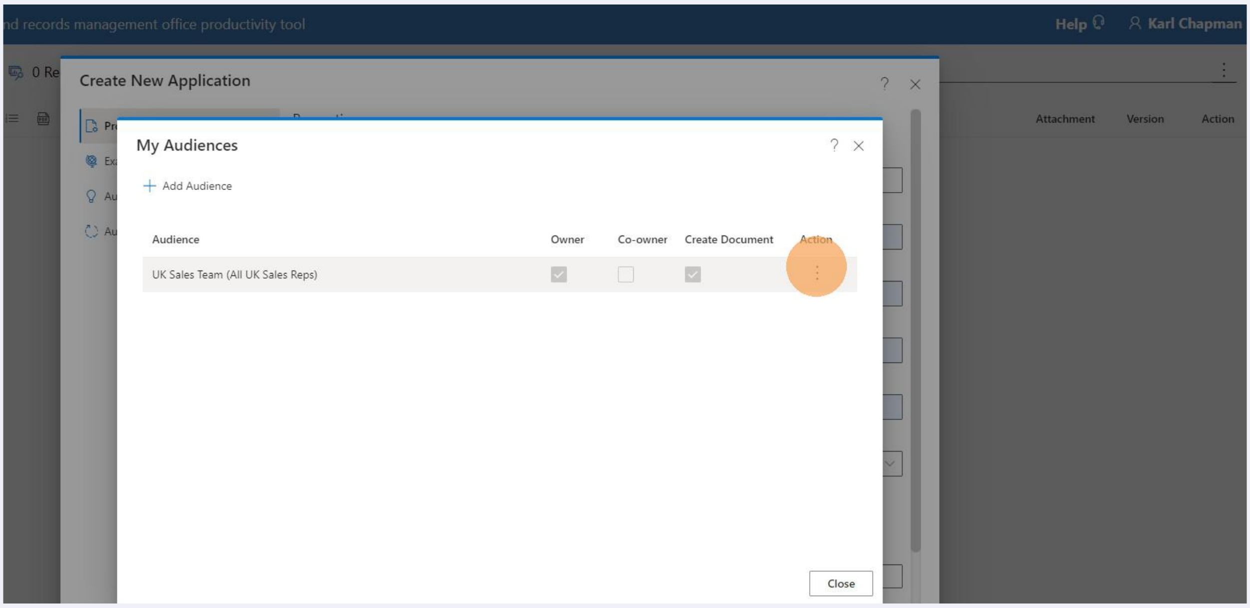
Under 'Name' put UK Sales Team (or whatever the audience name is).



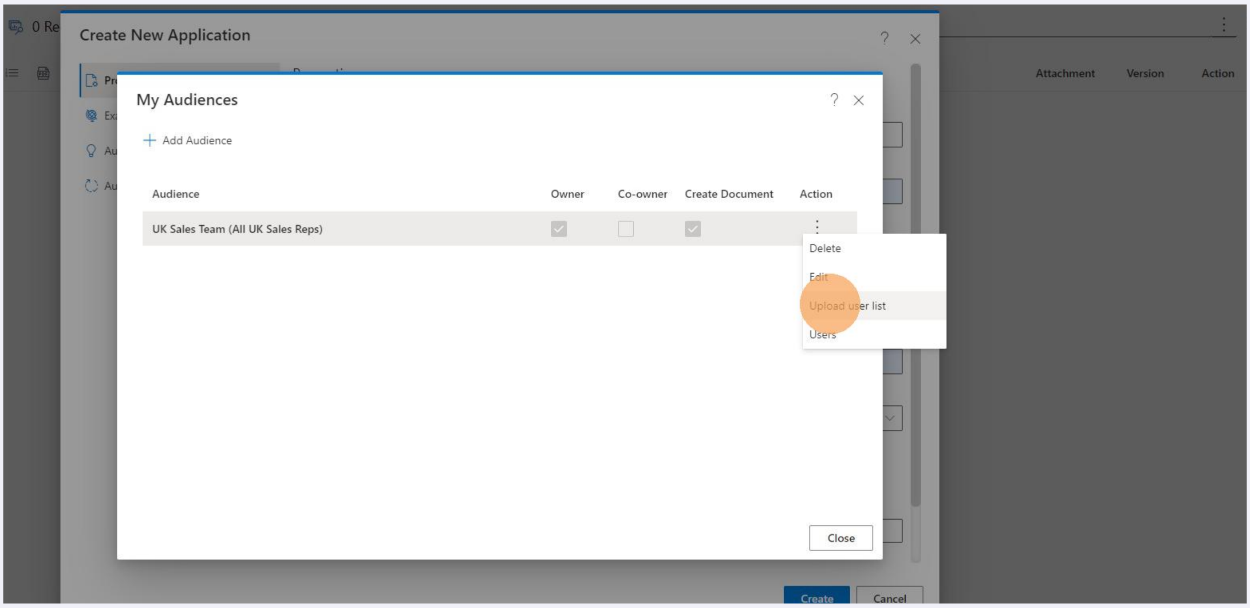
8 Complete the rest of the dialog box.



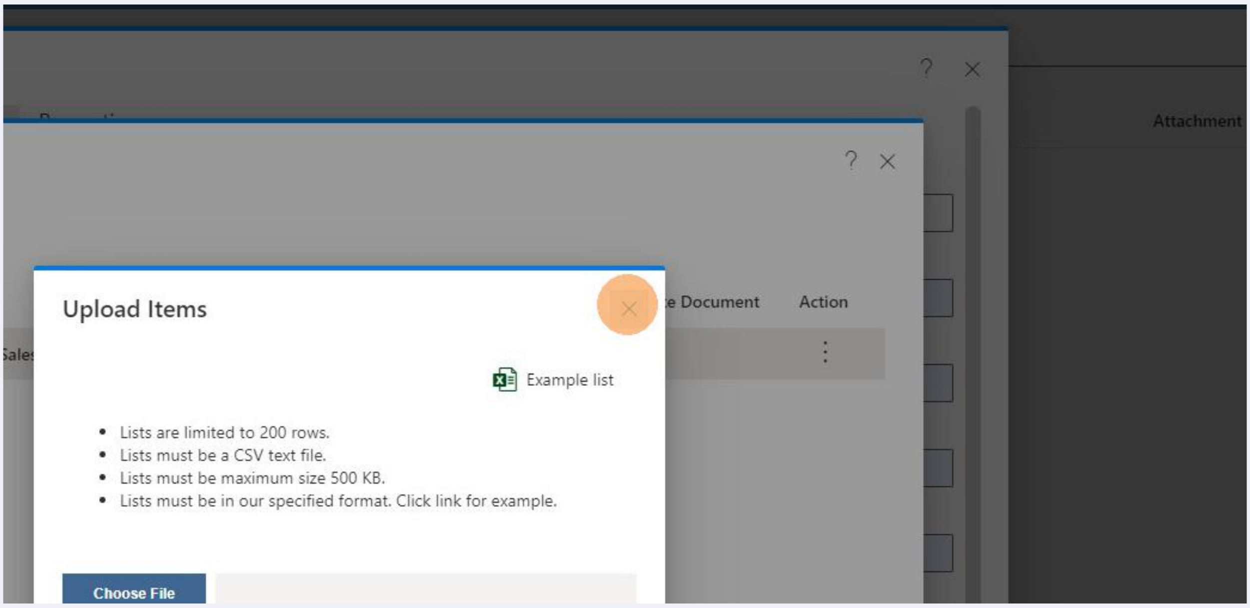
9 Having created the 'Audience' you can now add Users to this 'Audience'. In this example these Users will be all members of the UK Sales Team. Select 'Action'



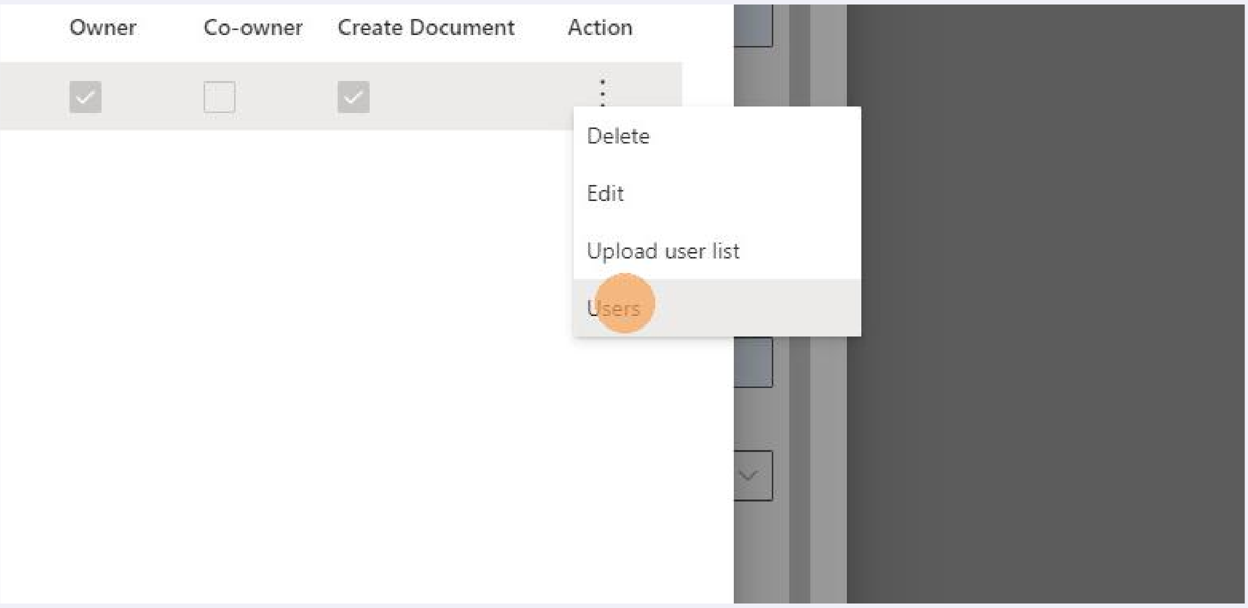
10 Either select 'Upload User List' ...



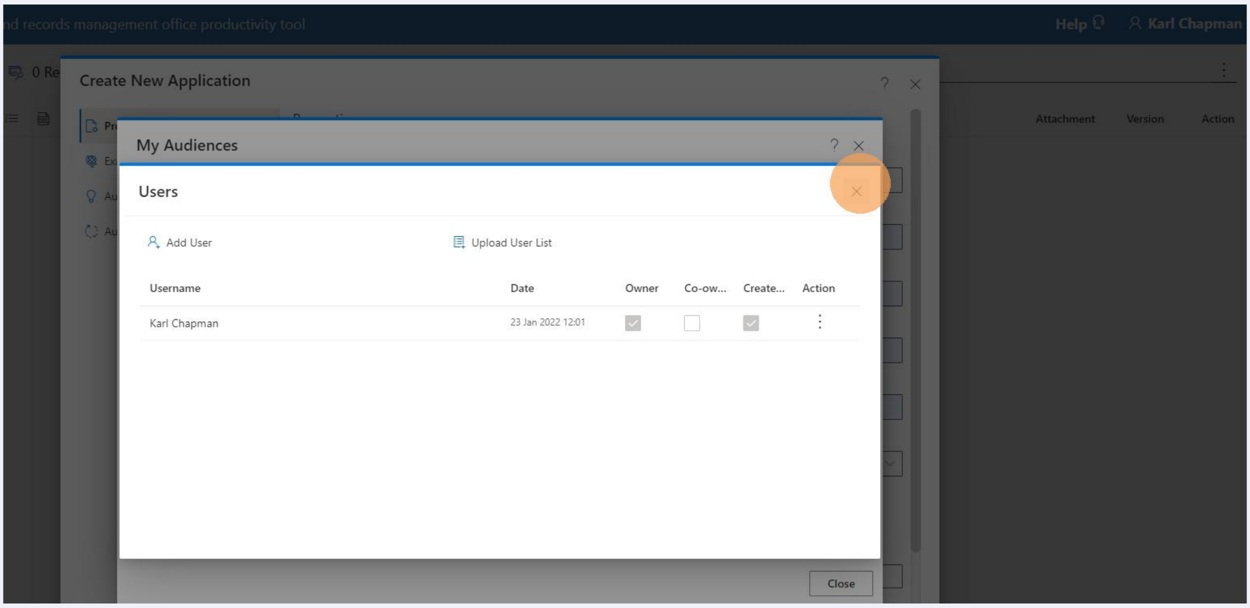
11 ... and when you do you will be able to use the 'Example list' format to upload the names and email addresses of all the UK sales team.



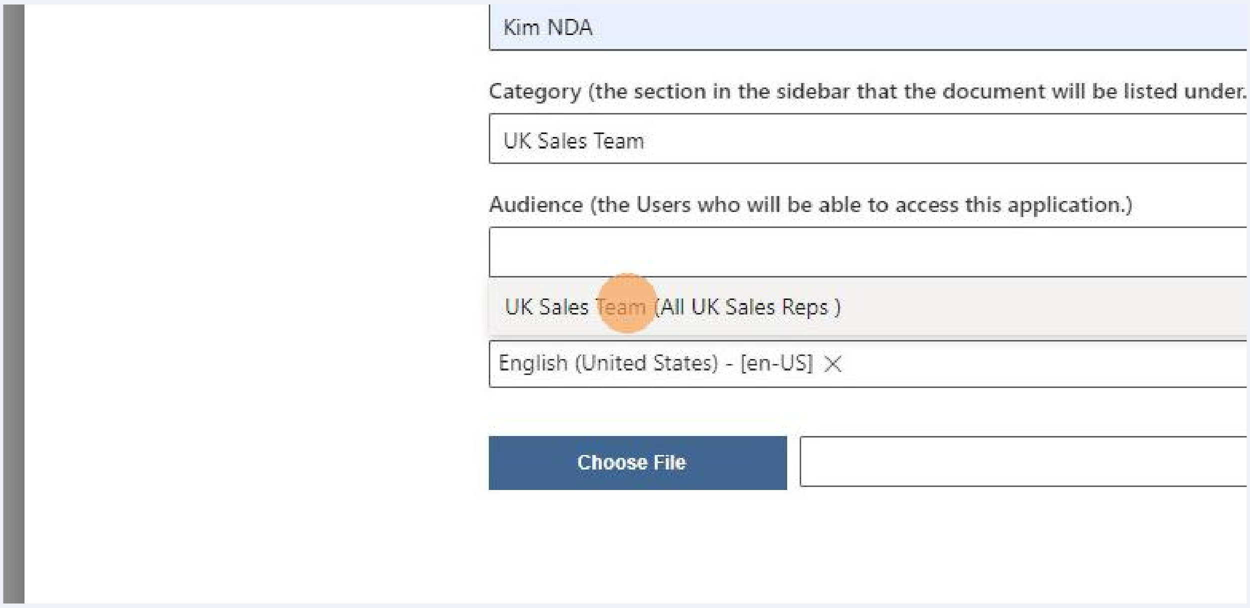
12 Or select 'Users' from the menu ...



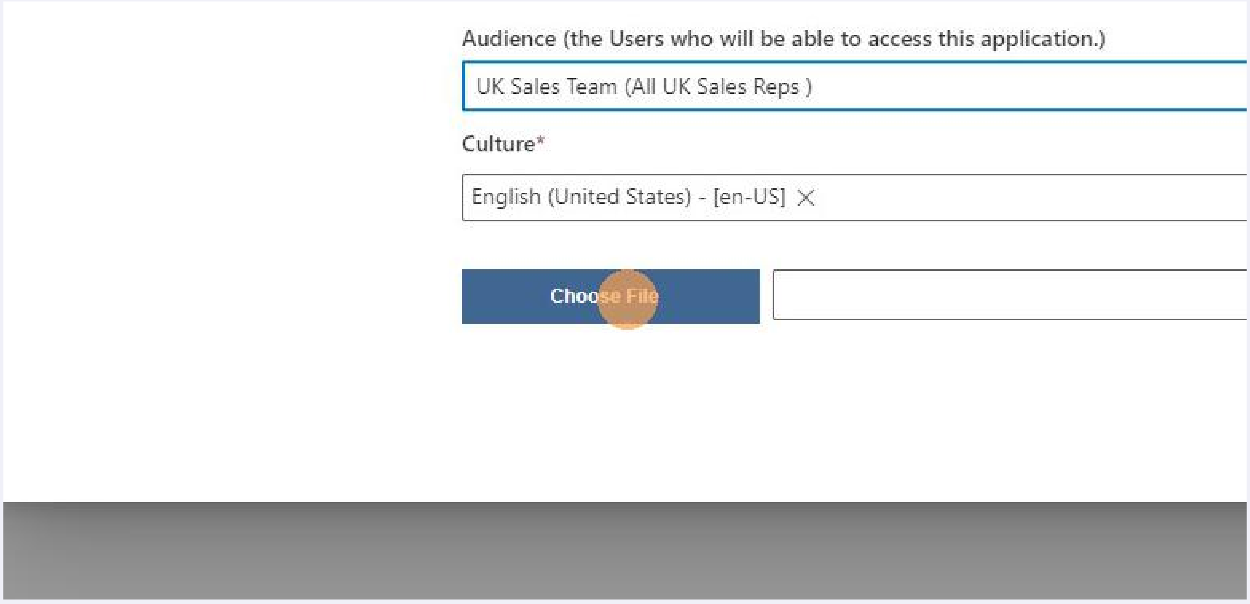
13 ... and add Users manually. When you have added Users, however you have added them, exist this screen.



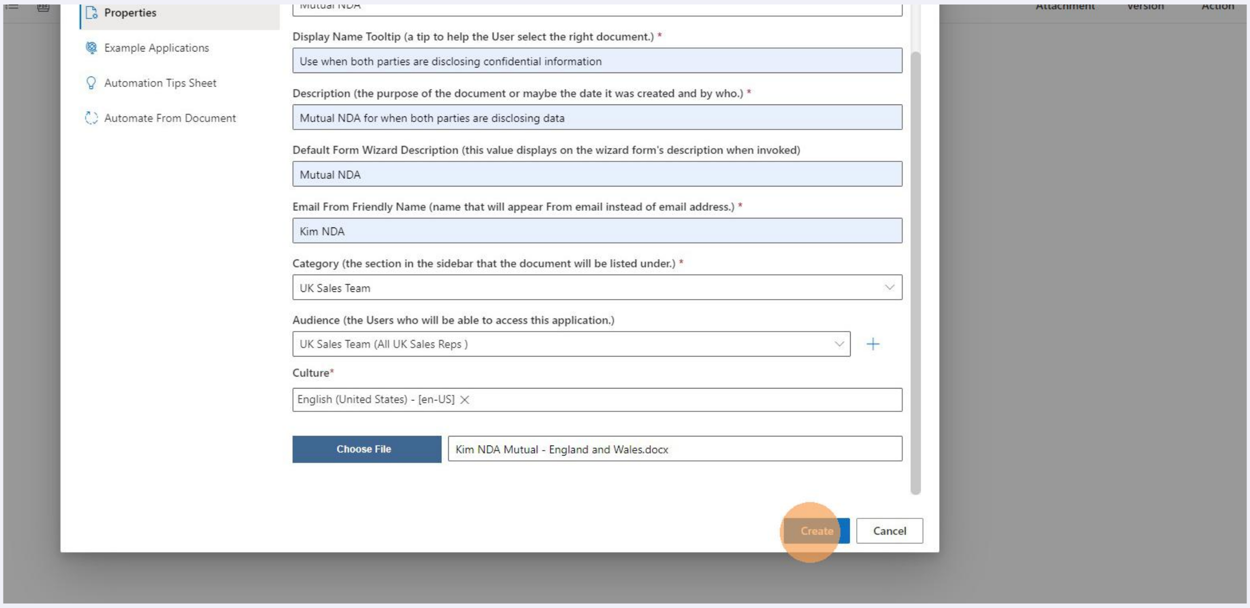
14 You are now back in the main dialog box to upload your document. Select 'Audience' and now select UK Sales Team (All UK Sales Reps)'



15 Finally, select 'Choose File'



16 Upload the document you have previously tagged and select 'Create'



17 After a few seconds you will see the screen below. To the left in the 'Applications' menu you can now see 'UK Sales Team'. In the centre of the screen all the tags from the document you have uploaded appear as blue buttons in the left-hand menu. You are now ready to use the the Kim Wizard to create the form Users will input data into the generate the document. Save the document and go to "3. Automate It - How To Automate A Document'.