

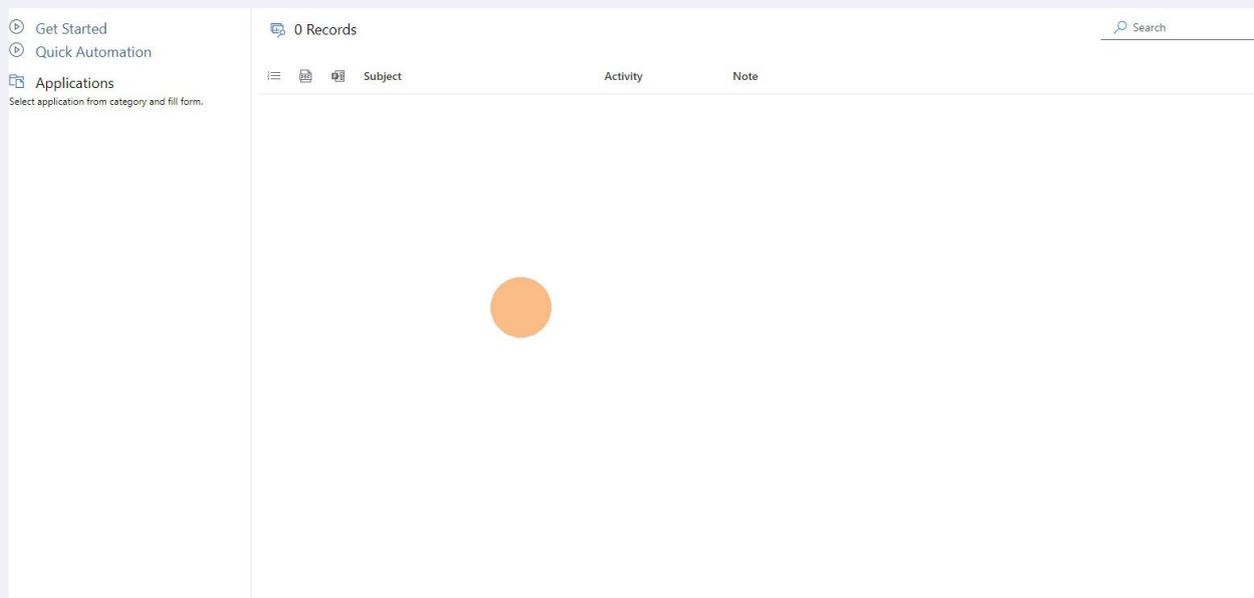
2. Upload it - How to Upload a Document, Create an Application Category (Menu Item) and Create an 'Audience' (Who Has the Rights to Use a Document).



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').

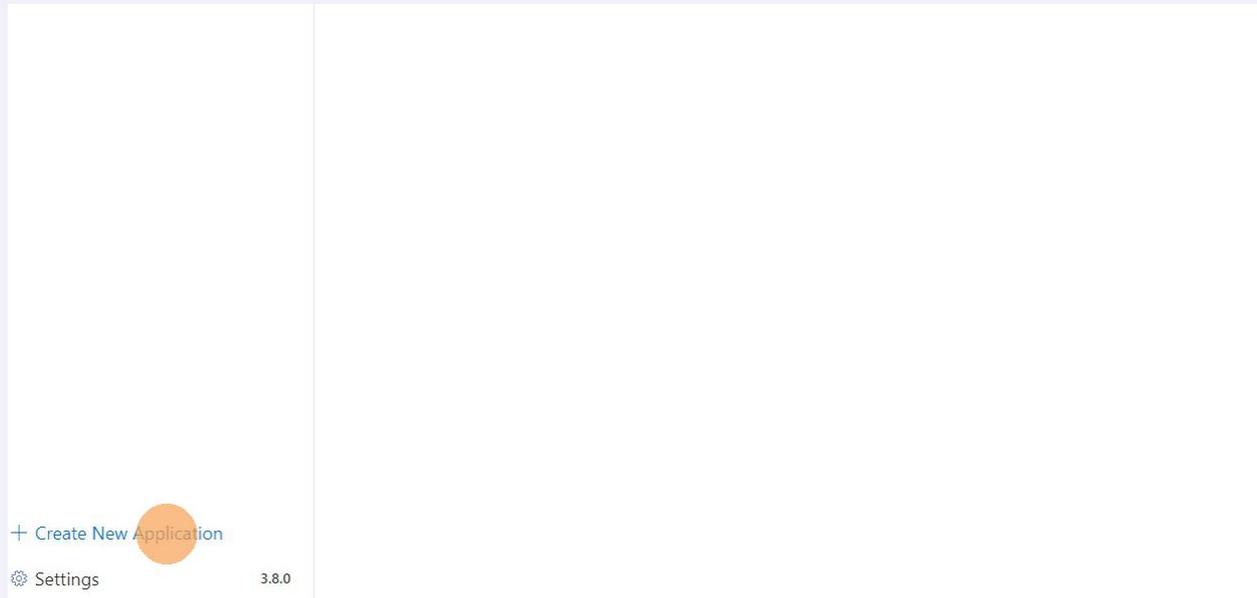
1

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.



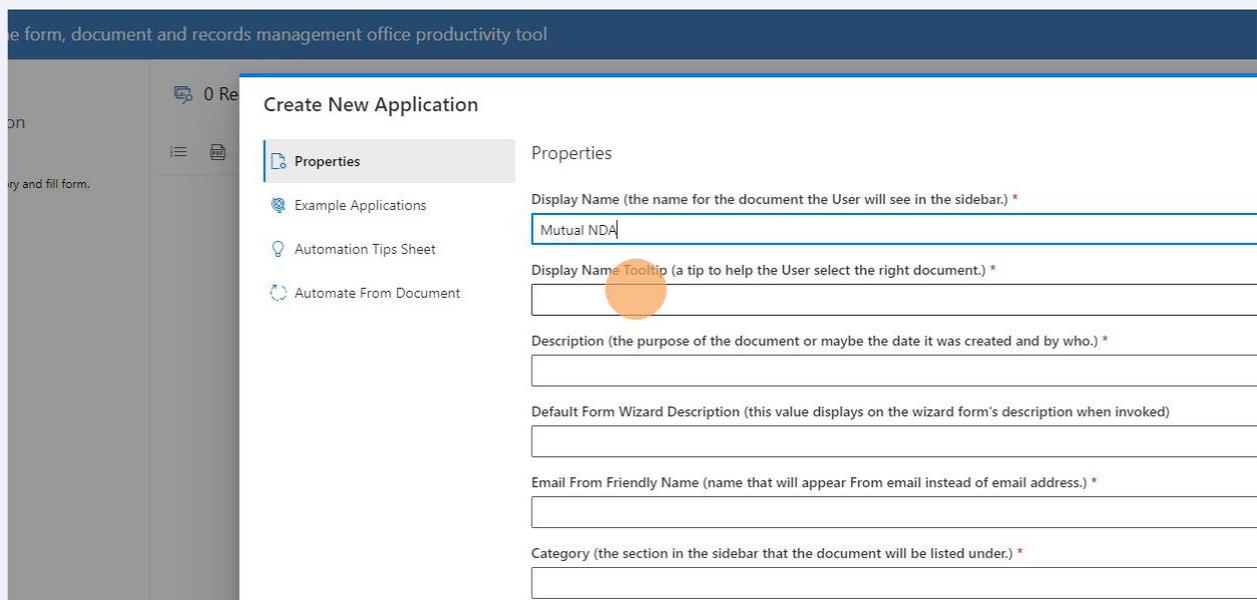
2

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.



4

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'.

A screenshot of a document creation form. The form includes several text input fields and a dropdown menu. An orange circle highlights the 'Category' field, which is currently empty. The fields are: 'Use when both parties are disclosing confidential information' (empty), 'Description (the purpose of the document or maybe the date it was created and by who.) *' (filled with 'Mutual NDA for when both parties are disclosing data'), 'Default Form Wizard Description (this value displays on the wizard form's description when invoked)' (filled with 'Mutual NDA'), 'Email From Friendly Name (name that will appear From email instead of email address.) *' (filled with 'Kim NDA'), 'Category (the section in the sidebar that the document will be listed under.) *' (empty, highlighted with an orange circle), 'Audience (the Users who will be able to access this application.)' (empty dropdown), and 'Culture*' (filled with 'English (United States) - [en-US] X'). A blue 'Create' button is at the bottom right.

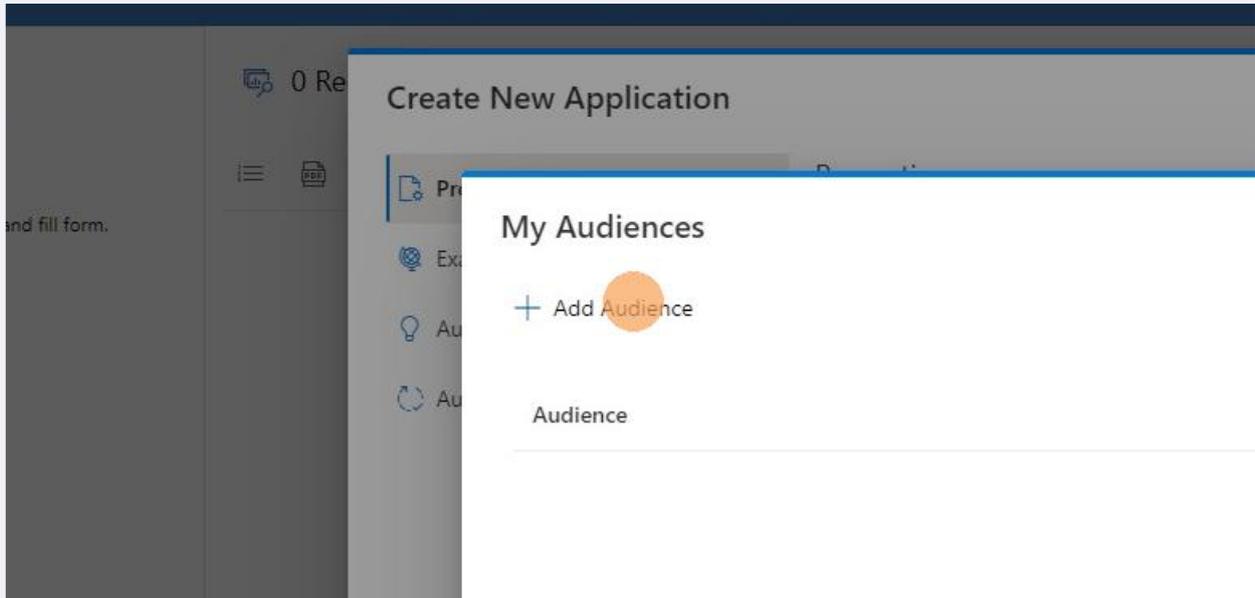
5

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 '+'.

A screenshot of the same document creation form. The 'Category' dropdown is now set to 'UK Sales Team'. The 'Audience' dropdown is open, showing a '+' icon highlighted with an orange circle. The 'Create' and 'Cancel' buttons are visible at the bottom.

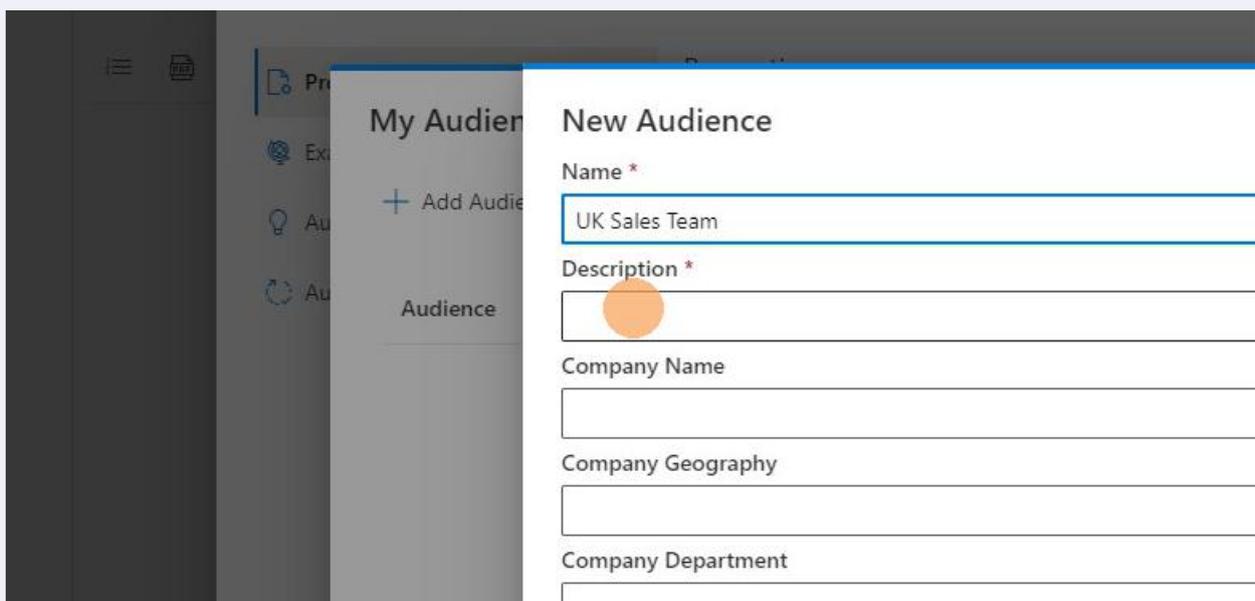
6

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.

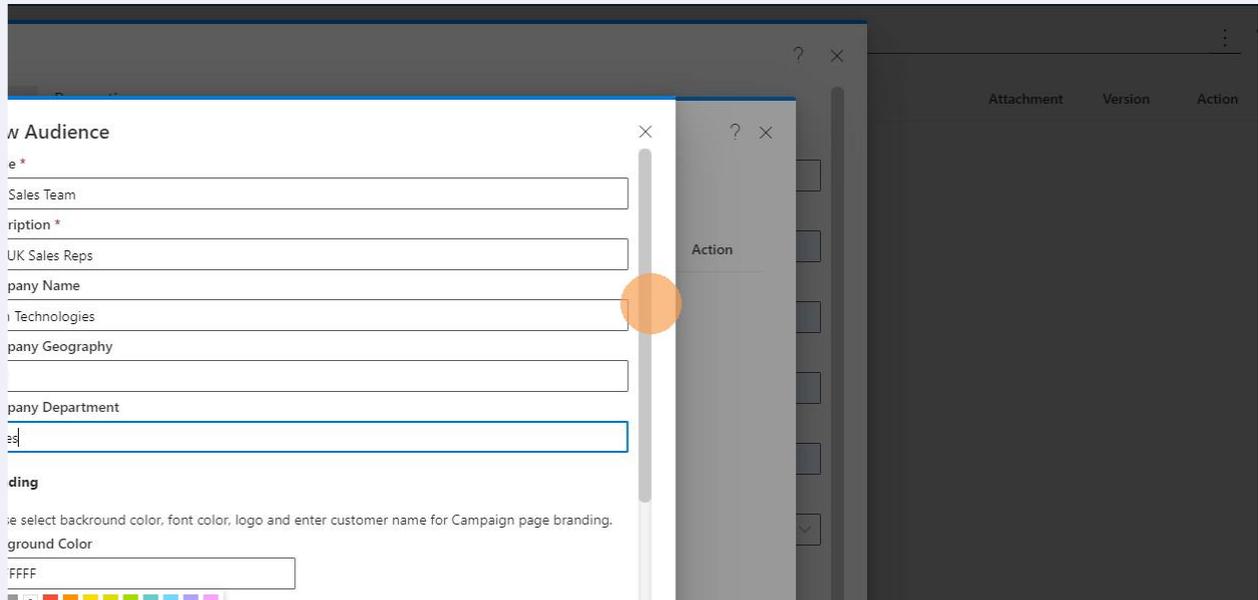


7

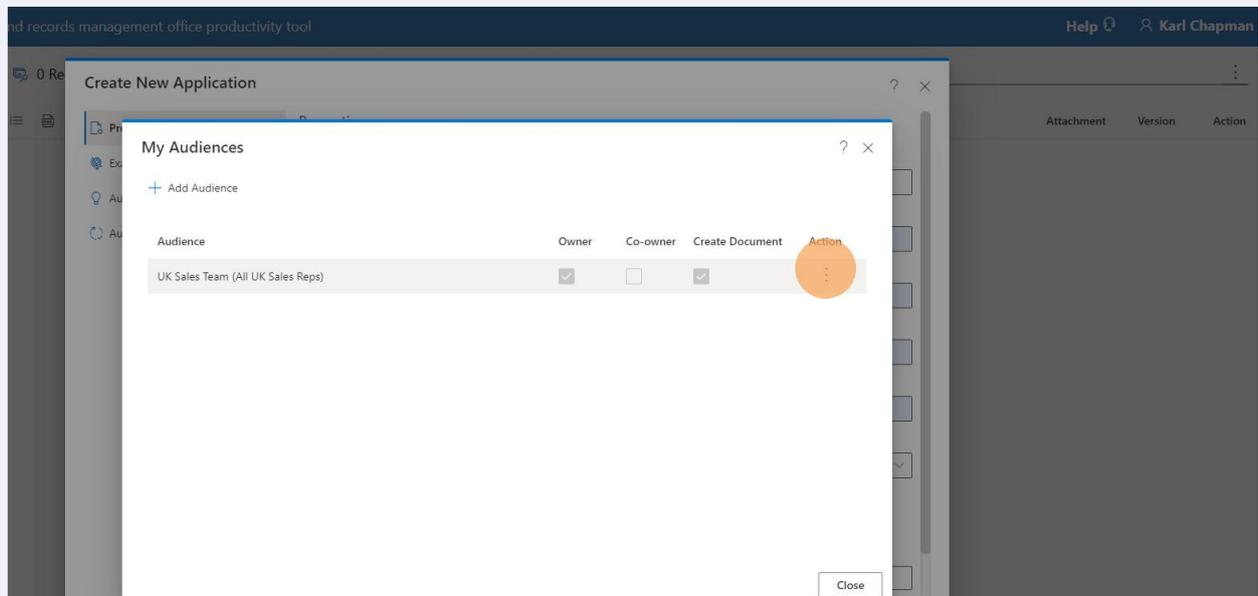
Under 'Name' put UK Sales Team (or whatever the audience name is).



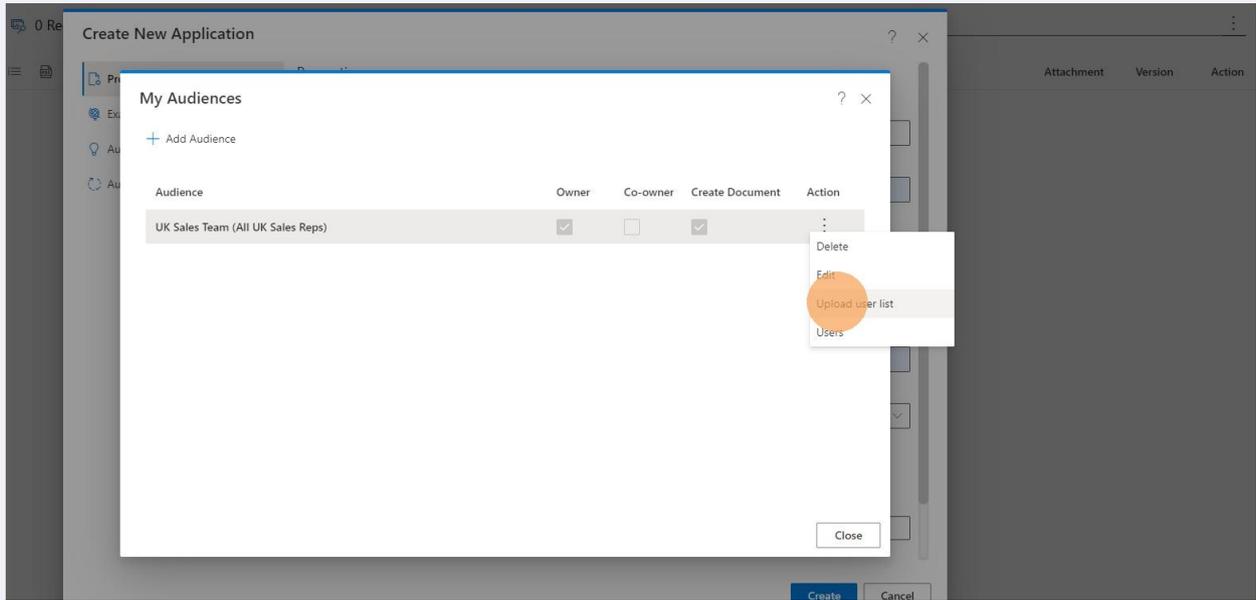
8 Complete the rest of the dialog box.



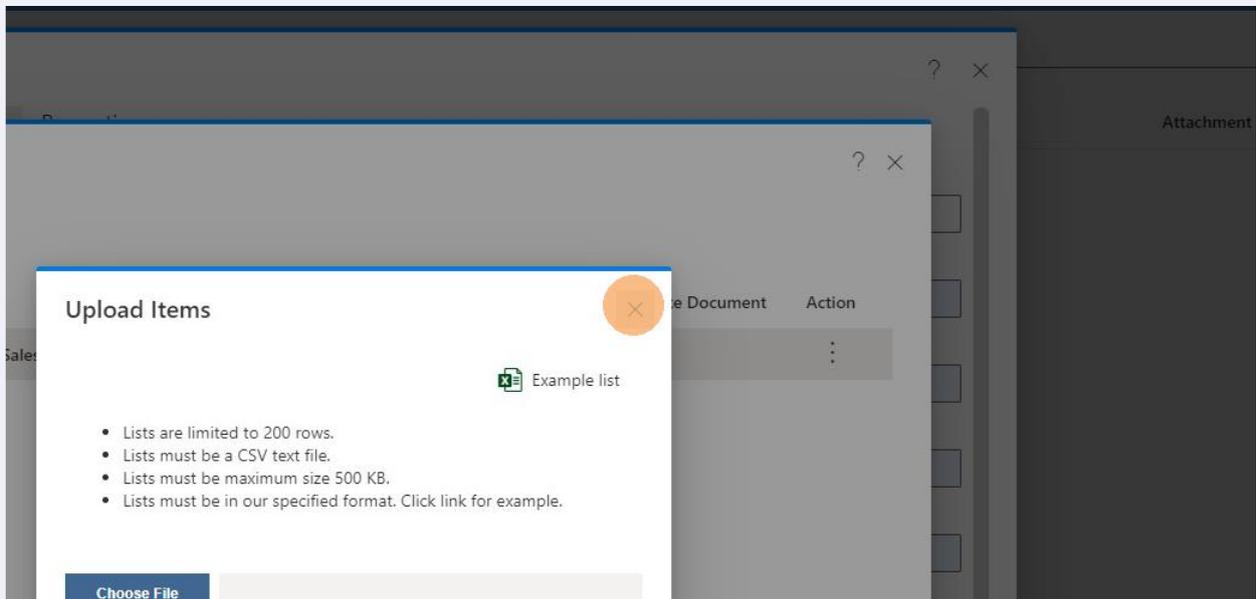
9 Having created the 'Audience' you can now add Users to this 'Audience'. In this example these Users will be all members of the UK Sales Team. Select 'Action'



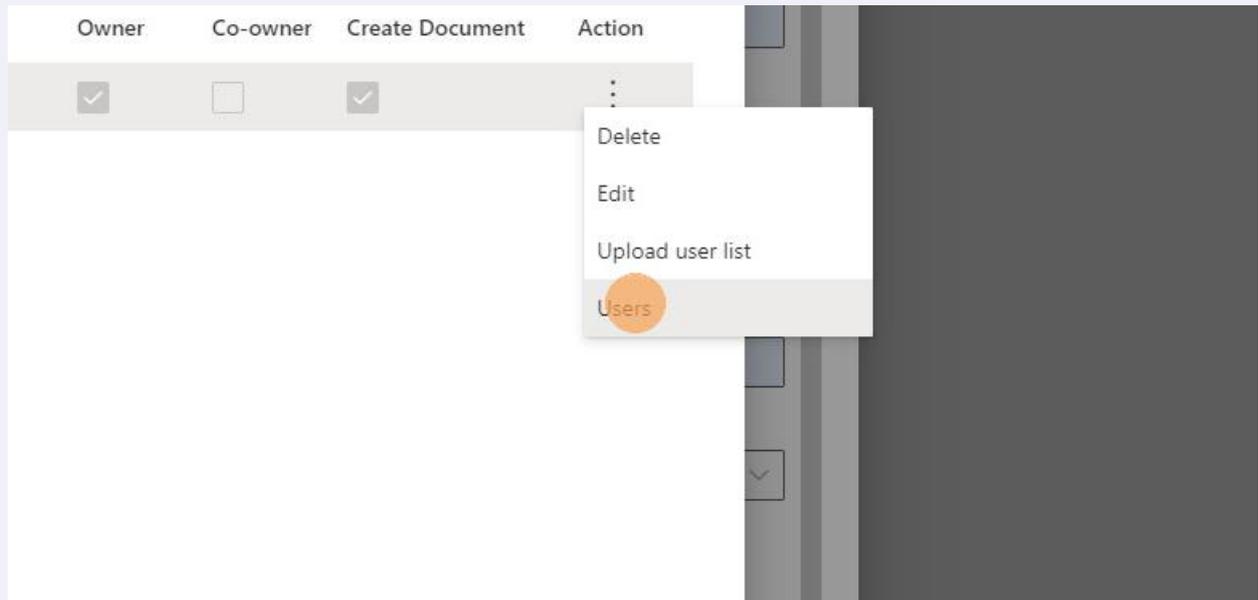
10 Either select 'Upload User List' ...



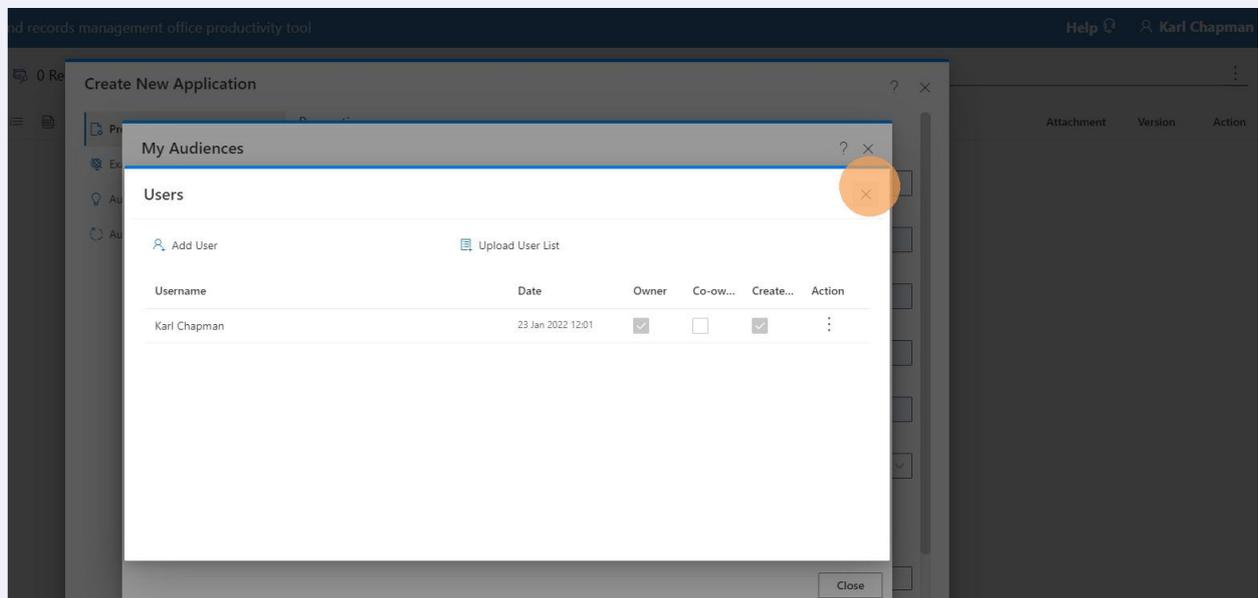
11 ... and when you do you will be able to use the 'Example list' format to upload the names and email addresses of all the UK sales team.



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)'

Kim NDA

Category (the section in the sidebar that the document will be listed under.)

UK Sales Team

Audience (the Users who will be able to access this application.)

UK Sales Team (All UK Sales Reps)

English (United States) - [en-US] X

Choose File

15

Finally, select 'Choose File'

Audience (the Users who will be able to access this application.)

UK Sales Team (All UK Sales Reps)

Culture*

English (United States) - [en-US] X

Choose File

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

Properties

Example Applications

Automation Tips Sheet

Automate From Document

Display Name Tooltip (a tip to help the User select the right document.) *

Use when both parties are disclosing confidential information

Description (the purpose of the document or maybe the date it was created and by who.) *

Mutual NDA for when both parties are disclosing data

Default Form Wizard Description (this value displays on the wizard form's description when invoked)

Mutual NDA

Email From Friendly Name (name that will appear From email instead of email address.) *

Kim NDA

Category (the section in the sidebar that the document will be listed under.) *

UK Sales Team

Audience (the Users who will be able to access this application)

UK Sales Team (All UK Sales Reps)

Culture*

English (United States) - [en-US] X

Choose File

Kim NDA Mutual - England and Wales.docx

Create Cancel

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".

Kim Document - The

Application (Mutual NDA)

Drag controls from the left panel onto the palette when you have finalised the Wizard slide to blue so

CounterpartyName

CounterpartyAddress

KimJobTitle

KimSignatoryName

Date