

Thomson Reuters Contract Express

Automation Services Brief

Thomson Reuters (TR) provides document automation services. Below is a guide to ensuring an efficient process for automation that will allow for the best possible output. The process is reliant on the brief being delivered as below, and will give opportunities for you to provide feedback and update the document.

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:

Marking up the base document

Highlighting of the document in two colours best enables us to automate the document:

- Use one colour to denote where variable information (such as party names, or agreement dates) should be inserted:

- 2 The Tenant is **Business Integrity Limited** whose registered office is at **Watchmaker Court, 33 St John's Lane EC1M 4DB** and whose company number is B1456789.
- 3 The Premises are **2nd Floor, 8-11 St John's Lane London EC1M 4BF**.
- 4 The Term of this lease begins on Date and ends on **01/05/2011**, in full **First May 2011**.

- Use a second to show areas of text that are optional:

<p>22.4 headings are given in this Lease for convenience only and do not affect the meaning of the text.</p>	
<p>BREAK CLAUSE</p> <p>23 Either the Landlord or the Tenant may give to the other not less than [NoticePeriod] weeks' written notice to end the Term. Ending the Term will not release the parties from their accrued liabilities down to that date.</p>	<p>Will Summers A few seconds ago This should only be varied from our standard where two commercial parties are involved</p>

- You may also want to add comments, where a complex area is concerned.

Providing the questionnaire

The content of the questionnaire must be provided to TR in the following format:

Question	Options	Guidance	Contract Reference
<i>This should contain an indication of what should be asked, or if complex, the exact wording</i>	<i>What the question should be or options if relevant</i>	<i>Any further guidance for the user</i>	<i>What sections of the agreement are affected</i>
Name of Landlord	Text Box	Please use the full name, e.g. Thomson Reuters Ltd.	Recitals, Signature Blocks
How much notice should be given in order to terminate this Agreement for material breach?	2 weeks 1month Other	If choosing 'other' please be sure to specify the time unit, e.g. business days or weeks	Clause 5 termination, Clause 10 Survival.

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 Thomson Reuters 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. Thomson Reuters initial automation of document
- b. Internal Thomson Reuters testing of template questionnaire behavior 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

6. Thomson Reuters Final Review

- a. Thomson Reuters to update agreement based on Customer feedback

7. Document released to Customer

- a. The automated document is delivered to the Customer and if applicable uploaded to their chosen deployment for use

For bespoke, estimated price document automation only:

Steps 3 and 4 may be repeated to ensure desired output and may involve broader user testing by the Customer.

