# Thomson Reuters HighQ



## **Thomson Reuters HighQ**

A sophisticated set of interconnected capabilities designed to enable legal workflows & power diverse, scalable & differentiated solutions.

- Virtual Data Room (VDR)
- Transaction Management
- Due diligence

CASES

USE

- Litigation Management
- Client portals
- Compliance Management
- Contract Lifecycle Management

- Matter Management
- Portfolio/ Asset Management
- Citizen engagement
- Digitized subscription services
- Document Management
- Fund Formation
- Digital Vaults

- Board Management
- Bid Management
- Knowledge Management
- Matter Intake
- Contract Management
- Corporate Housekeeping
- Intranet

- Claims management
- Arbitration case management
- Regulatory investigations
- Tax management
- Legal project management
- Title IX
- Public record requests



THOMSON REUTERS LEGAL TECHNOLOGY SOLUTIONS

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HighQ™

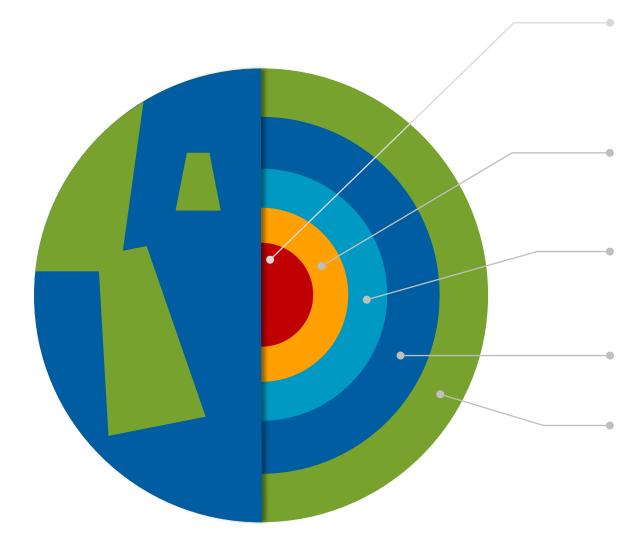
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THOMSON REUTERS DOCUMENT INTELLIGENCE THOMSON REUTERS



## HighQ Use Case Journey



## Legal services platform

Integratio	ons	Board ro	ooms	Trans	actior	ns Liti		gation M	lgt		
AI	Product	Flow	Fund formation			API					
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Docume	Document Automation										
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## Virtual Data Rooms

rketplace Market place templates	<ul> <li>Our people</li> <li>Dashboards</li> <li>Legal Home</li> </ul>	e Template Generation Knowledge Management										
> Project Alpha (8899-2021) → >	Activity Files Admin											
K Hide Search folders	Upload - New - Action - View - Project Alpha (8899-2021)					+ fischer			<b>C 1 1 1</b>		۹ (	
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1.7 COMMERCIAL CONTRACTS     1.7.1 Customer 1 (3)	G SCLIENT UPLOAD		29 IC	¢	No \$	Question \$	Organisation \$	Author \$	Asked on \$	Status 🌲	Priority \$	Related to \$
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			10	19 :	23	! there is no date on this document Legal	HighQ Thomson Reuters	Sarah Tai	09 Jun 2023	Pending	High	Project Albatross
3 CLIENT UPLOAD (4)  Index Recent			10	15	22	Please can you upload the unreacted version? General	Corp Invest	Adam Cole	30 May 2023	Pending	High	2.3.3 Loan agreement LEASING 2017.pdf
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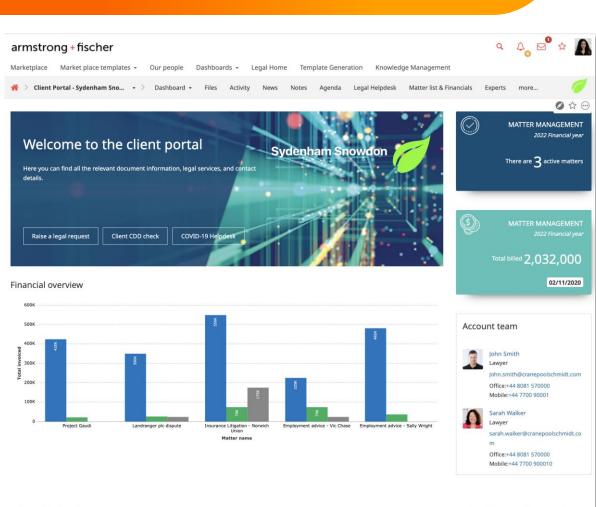
# Legal Project Management

reliance letters, and conducting other DD searches.

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C	🛛 💮 Preliminary Matters	Preliminary Matters	Work on Preliminary Matters (Letter of Intent, Confidentiality Agreements, Exclusivity and Inducement).	Complete	Low (under budget)	23 May 2023 07:05		Task ID - 1296 Review Agreement Due on 16 Nov 2022	♂ 0/2 % 1	Add task		Task ID - 5925 • Review license agreement Due on 05 Aug 2022	⊘ 0/2	Add task	
C		Shareholder/Board Matters	Time spent on board presentations regarding du diligence findings and the transaction, drafting o		Medium (on track)	23 May 2023 07:03		In Phase 2 - Transactional Overdue	1			In Phase 2 - Transactional	8		
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		Regulatory and Specialty Matters	Work related to obtaining regulatory clearances by the subject matter expert.	done Complete	Low (under budget)	23 May 2023 07:05									
		Due Diligence and Disclosure Schedules	Reviewing documents, management presentati DD questionnaire, data room set up, negotiating	ns, In progress - on track	Critical (overrun)	23 May 2023 07:03									



## **Client Portals**



**Raise an Instruction** 

Instruction Details

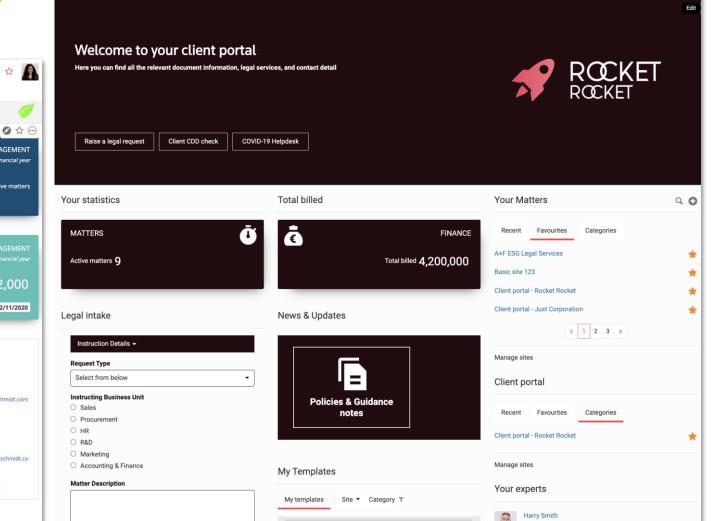
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Market place templates - Our people Dashboards - Legal Home Template Generation Knowledge Management

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armstrong + fischer



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Contract Express Document Generator

## Portfolios

Add

Actions -

Portfolio project Management - Property portfolio -

### ۹ 4 🗗 🖻 🕁 🧥 armstrong + fischer Marketplace Market place templates - Our people Dashboards - Legal Home Template Generation Knowledge Management 👫 〉 Real Estate & Legal Help Desk 🔹 👌 Home 👻 Files Portfolio 👻 Key Dates Tasks Legal Help Desk 👻 News and Updates Ask A Question Admin Ø \$ ... **Real Estate Portfolio** Go to Portfolio 👫 > Real estate lease review & Por... 🔹 > Dashboard Documents Tasks Lease Review Lease Risk Overview Property portfolio People Calenda 1 - 4 of 4 Quick sear TOTAL AREA TOTAL RENT The total occupied property rent per annum is

Overview on	project Managed DD projects							The total sq metres of the prope	erty portfolio is <b>93,143</b> sqm	£ 1,116,048	The total number of vacant units is 5
	image 👻	Object name 👻	Object address +	Status 👻	Proces step status 👻	Next party ir agreement	n Legal contra				No
		Building B	22 Place to work, BH99 6BT London	Progress	Signature missing	Legal		Portfolio Management Add a Property Legal Help Desk			Renewal Team Maria Garcia HighQ Thomson Reuters, Canary Wharf, London, London, United Kingdom, E14 5AQ, +44 20 7220 5340 maria.garcia@armstronglaw.org
		Building A	52 Front Street, BH21 9ET London	Progress	Signature missing	Finance		Ask a Question Generate a lease	Total Area		Office:+44 8081 570000
		Building C	22 Rockstone, BH99 6BT Manchester	Escalated	On hold	Finance		Envrionment al agreements			
		Building D	121 Blue Tower street, LH98 6BT London	Progress	Waiting for signature	Bank	Credit A 2004.pd	greement Finance f O agreements			



## Due Diligence

#### armstrong + fischer

Marketplace Market place templates - Our people Dashboards - Legal Home Template Generation Knowledge Management

Folder -

Activity Files Tasks - DD Process Checklist & Report - People Admin

File status - Section -

Not started

02 Commercial

Contracts



[DM] Dido - Due Diligence - Default -

Co., 23-12-2015.pdf 🔮

Agreement AWS Services Sarl and

General Service Division

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File -

Issue -

1 - 100 of 163 Quick search

Review issue - Issue Title -

Change of Control

High Risk

High probability

\* \$ ...

Risk Profile - Risk Probability -

1.

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<u>لم</u>	1.1.1 Facility agreement.pdf 🔮	Complete, Voided	04 Treasury	1.1 /Commercial contracts/Customer contracts/Corporate	Yes	Exclusivity clause in agreement	High Risk	Medium probability
	1.1.2 Security agreement 2016 Final.docx 👁	Not started, Voided	01 Corporate	1.1 /Commercial contracts/Customer contracts/Corporate	Yes	1.2 Agreement not signed	Medium Risk	Low probability
••• 🚺	1.1.3 Commercial Outsourcing Services Agreement 2019.docx 🔮	In progress, Voided	02 Commercial Contracts	1.1 /Commercial contracts/Customer contracts/Corporate	Yes	1.3 Exclusivity clause found	High Risk	Medium probability
<u>لم</u> ا	1.2 Customer Agreement AWS Corp and Danielson Co., 09-01-2011.pdf ♥	Complete	02 Commercial Contracts	1 /Commercial contracts/Customer contracts	Yes	2.1.1 Agreement not signed	High Risk	Low probability
<mark>∕</mark>	1.3 First Amendment to Customer Agreement AWS Corp and Danielson Co., 19-12-2011.pdf ♥	Not started		1 /Commercial contracts/Customer contracts	No			
<u>م</u> ا	1.4 Customer Agreement AWS Corp and Mesa Verde Ltd, 20-02-2016.pdf	Not started		1 /Commercial contracts/Customer contracts	No			
⊕ <mark>人</mark>	1.5 Customer Agreement AWS Corp and Davis and Main, 03-02-2017.pdf ♥	Not started	02 Commercial Contracts	1 /Commercial contracts/Customer contracts	Yes	Change of Control	High Risk	High probability
	1.6 Second Amendment to Customer Agreement AWS Corp and Danielson	Not started	07 Real Estate	1 /Commercial contracts/Customer	Yes	Termination Clause	High Risk	High probability

contracts

P 1 /Commercial

contracts

contracts/Customer

Yes

Exhibit 10.1

#### CUSTOMER AGREEMENT

tood and agreed that this document shall constitute a separate agreement with each party listed on Exhibit A attached hereto, as if each such party had executed a separate document naming only itself as Customer, and that no party listed on Exhibit A shall have any liability under this document for the obligations of any other party engaging in Transactions with UBS-S LLC, including any other party so listed. With respect to any one such party, ۹ ♀ ◘ ☆ ♪ ences in this Agreement to Customer shall be deemed to refer only to such party, and (iii) the term "this ment" shall be construed according to the foregoing provisions.

> This Customer Agreement ("Agreement") between UBS Securities LLC ("UBS-S LLC") and each fund d in Exhibit A (jointly not severally) ("Customer") shall govern the purchase and sale by UBS-S LLC of certain res contracts, options thereon and options contracts for the account and risk of Customer through one or more ts carried by UBS-S LLC on behalf and in the name of Customer (collectively, the "Account"), as more fully ribed below. "Business Day" as used in this Agreement means any day other than a Saturday, Sunday and/or r day on which the New York Stock Exchange is closed.

> > UBS-S LLC'S AUTHORIZATION TO ACT AS BROKER

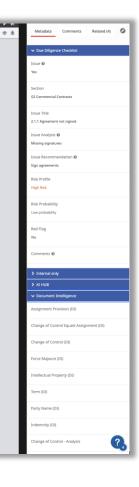
Customer authorizes UBS-S LLC, acting through employees and agents selected by it in its sole discretion, to purchase and sell for the Account contracts for certain futures contracts, options thereon and options contracts for which UBS-S LLC has notified Customer that UBS-S LLC is prepared to execute transactions (collectively, "Contracts") within or outside the United States of America in accordance with Customer's instructions

#### CUSTOMER'S REPRESENTATIONS AND WARRANTIES

(a) Representations and Warranties. Customer hereby represents and warrants (which representations and warranties are deemed to be continuing for the term of this Agreement) as follows:

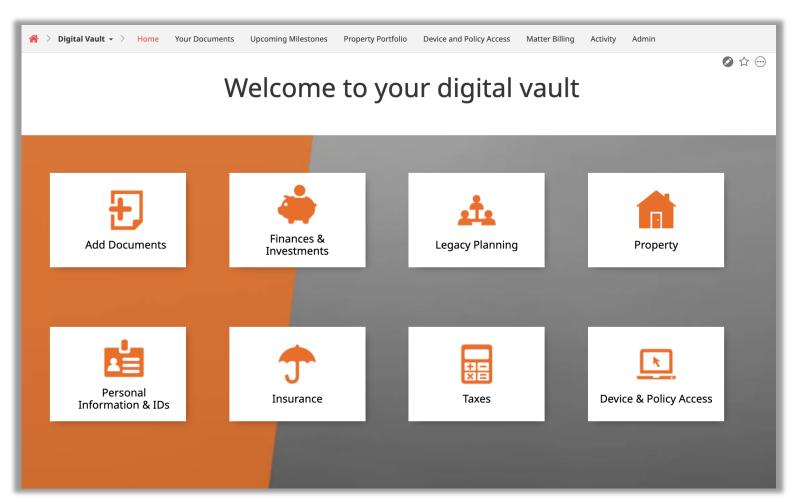
Authority. Customer has full right, power and authority to **(i)** enter into this Agreement and the Contracts, and the person executing this Agreement on behalf of Customer is authorized to do so. This Agreement is binding on Customer and enforceable against Customer in accordance with its terms;

Lawful Agreement. Customer may lawfully establish and open (ii) the Account for the purpose of effecting purchases and sales of Contracts through UBS-S LLC. Transactions entered into pursuant to this Agreement will not violate any "Applicable Law" (as defined below) to which Customer is subject or any agreement to which Customer is subject or a party and the execution, delivery and performance of this Agreement by Customer require no action by or in respect of or tiling with any governmental body, agency or official





## **Digital Vault**



Add + View: Card + Group: Li		ed by me	Favourites					Search and filter tasks	~
Vill 5 Year Review			Pre-sale reorganisation		Preliminary agreements			Legal due diligence	
Task ID - 7556 Review this Due on 04 Oct 2022 Noticiartee Overdan			Task ID - 11438 Agree pre-sale reorganisation structu Not started	ire an	Task ID - 11440 Agree confidentiality agreement Not stand			Task ID - 11444 Prepare for legal due diligence Not started	
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Task ID - 9722 5 year reminder for reviewing Will Due on 06 Mar 2028	2		Task ID - 11439 Tax planning Net started		Task ID - 11441 Agree heads of terms			Task ID - 11445 Agree legal due diligence questionn Not stanted	naire
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C Task ID - 9721	☆		Add task		Task ID - 11442 Agree exclusivity agreement			Task ID - 11446 Review legal due diligence documer	nts
5-year reminder for reviewing Will Due on 17 Mar 2028 Complete						습			☆
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Task ID - 9771 5 year reminder for reviewing Will Due on 03 Apr 2028 Notsarree					Net started	☆		Net started	☆
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	Finances & Investments	\$
Taxes Vehicles & Aviation Will for (2)	Insurance	습 (
Index	Legacy Planning	\$
Recent Shared items	Personal Information & IDs	\$
Received items Favourites	Property & Home	\$
eSignature tracking 0 Attachments	Taxes	\$
Deleted items	Vehicles & Aviation	\$
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# Board Room Management & Company Secretarial

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About HighQ HighQ Knowledge Base HighQ Blog Client C	ommunities 👻 Template Generation Learning Cent	re Dashboard Legal spend Management				
☆ Board management Corporates - > Meeting builder Board	oard dashboard 👻 Document packs Voting Board	d administrator 🗸 Board Wiki Q&A Calendar B	oard Admin			
Board room management		My Voting Board approvals items needs Voting 3 0 approvals waiting				
		Contraction REUTERS: About HighQ HighQ Knowledge Base HighQ Blog	Client Communities + Temp	plate Generation Learning Centre Dashb	ooard Legal spend Manag	역 🗘 🖸 ☆ 📷 ement
Board packs (recent)	Upcoming board events	🖀 🖒 Board management Corporates 👻 👌 Meeting bu	uilder Board dashboard - Doc	ument packs Voting Board admini	strator 👻 Board Wiki	Q&A Calendar Board Admin
Minutes of the Board of Directors.docx 31.79KB, /Main Board/New documents added Automated document incomplete	In the future Voting topic for the board On 24 May 2023	Add -     View: List -     Group: List -       All tasks     Assigned to me     Created by me     Fater	avourites			Search and filter tasks $\overline{\mathbf{v}}$
Meeting notice & Agenda Q Board meetings.docx 26.09KB, /Main Board/New documents added	Q Board meeting (US) On 04 Jul 2023 New York Q Board meeting (US) On 04 Oct 2023 New York	Title \$	Voting \ duration ≎	/oting %	Voter 1 \$	Voter 1 actions ≎
Draft Board meeting Q1 minutes.docx 25.93KB, /Main Board/New documents added	Q Board meeting (US) On 04 Jan 2024 New York	Voting Q1 Meeting				
Printable board papers Q1.pdf 3.55MB,	Q Board meeting (US)	Real estate only vote for extension leases 2024	26 5	5 % 👷 Harry Smith	Harry Smith	e Abstain
/Main Board/New documents added	On 04 Apr 2024 New York	Review our office location in LATM	26 1	10 % 🦻 👂 👔	Sebastiaan Bos	Yes
Q1 Performance overview document.pdf 3.98MB, /Main Board/New documents added		<ul> <li>Voting topic for the board</li> </ul>	22 1	1% 🤶 🗶 🚮	Sebastiaan Bos	Reject

## 

#### A > Project Lotus (CLM Demo) - > Dashboard - Contracts Legal Intake Contract overview News Tasks Calendar Legal Team Admin ⊘ ☆ ⊙ User instructions TOTAL LEGAL REQUESTS MY LEGAL REQUESTS Use the legal intake form to create a request for the Legal team, as soon as you save the request the request is automatically added to the work list and you will receive an automated email with your There are a total of **12** pending requests **O** pending requests request and unique request number. if you have any questions please use the contact for help list. Legal Intake 👻 🕐 > Project Lotus (CLM Demo) - > Dashboard - Contracts Legal Intake Contract overview News Tasks Calendar Legal Team Admin Please provide all requested information to your request submitted Add Actions -1 - 12 of 12 Quick search Status Legal intake + All Open Requests + Requested accepted Intake folder -Status -Request ref - Department - Contracts -Name of the Request type Description -Department Vendor/Party 📌 Requested accepted /Contract Intake/Ref-12 Ref-12 HR Contract for Review -Copy.pdf 🔮 Adam B Contract Short description of the request Select from below Review Contract for Review -Copy.pdf 🔮 Requested accepted /Contract Intake/Ref-11 Ref-11 HR Adam B Contract Short description of the request Drafting Contracts O Contract for Review.docx 🔮 HR 💏 In progress /Contract Intake/Ref-10 Ref-10 Adam Contract Short description of the request Review Contract Intake/Ref-9 Ref-9 Security agreement 2016.docx 🔮 ACME Ltd Sales Please review this contract Requested accepted Contract Review Security agreement 2016\_v3.2341 -Browse or drag file(s) here Sales ACME Ltd 📌 Requested accepted /Contract Intake/Ref-8 Ref-8 Contract Please review this contract Review Copy.docx 🕲 Credit & Security Agreement 2016.pdf 🔮 ACME Ltd Requested accepted /Contract Intake/Ref-7 Ref-7 Sales Contract Please review this contract Review Name of the Vendor/Party Credit & Security Thomson Agreement 2016.pdf 🕐 HighQ Thomson Reuters GDPR Issue Check for GDPR Requested accepted /Contract Intake/Ref-6 Ref-6 Finance HR Credit Agreement 2004.pdf 🔮 ACME Ltd Requested accepted /Contract Intake/Ref-5 Ref-5 Contract Please review this contract Review Request type 🔞 Loan agreement Prime 2016.pdf 👁 Thomson Reuters 彪 Requested accepted /Contract Intake/Ref-4 Ref-4 Procurement Contract Please review this contract HighQ Review Requested accepted /Contract Intake/Ref-3 Ref-3 Finance PoA - Ltd Industries.docx 🔮 Stark Inc Security Short description of the request

₽ ☆ …

Incident report

## **Document Automation**

## TEMPLATE GENERATION

Choose your questionnaire to generate your document

#### Labour Law

#### Employment Contract - Sr Employee

An employment contract (or service agreement) suitable for a senior employee or executive. For a list of additional standard clauses which may be used with this document (including director clauses to include in directors' service agreements), see Additional standard clauses: contracts of employment. For a version of the contract that includes most of the additional clauses, see Standard document, Director's service agreement.

#### Letter of claim (trade mark infringement)

Letter of claim (previously known as a "letter before action" and also referred to as a "cease and desist" letter) to be used in relation to the infringement of registered trade marks, with separate undertakings.

#### **Distribution Agreement**

Litigation

A standard document primarily designed for appointing an exclusive distributor in the UK in respect of a particular territory or a particular customer group.

#### **Commercial Contracts**

#### **Distribution Agreement**

A standard document primarily designed for appointing an exclusive distributor in the UK in respect of a particular territory or a particular customer group.

#### Franchise Agreement

Franchise agreement, which may be adapted according to whether pon-exclusive or exclusive

## r group..

#### Commercial Contracts - T&C

#### Terms and Conditions - Supply of Goods (procustomer)

Standard terms and conditions for a one-off supply of goods, drafted from the customer's perspective. This document is for use in business-to-business transactions.

#### Terms and Conditions - Supply of Goods (prosupplier)

#### Lease Package A commercial lease package that includes the

**Real Estate** 

main lease and optional rent deposit deed, licence for alterations, landlord notices and statutory declerations.

#### **Client Advice Letter**

Confidentiality

NDA with Clause Library

This Client Advice Letter covers what information you need to provide to your client, whether that is in your client letter, at an initial interview, or in whatever context you are providing legal services.

NDA (Non-Disclosure Agreement) is a contract

through which the parties agree not to disclose

information covered by the agreement. An NDA

creates a confidential relationship between the

parties, typically to protect any type of confidential

and proprietary information or trade secrets. As

such, an NDA protects non-public business

### Automation Request

Click below to raise a new automation request

#### Corporate Governance

#### Articles of Association for Private Company

Specimen short form articles of association for a private company limited by shares based on the model articles for private companies limited by shares contained in Schedule 1 to the Companies (Model Articles) Regulations 2008 (SI 2008/3229).

Minutes of the Board of Directors

#### Pages Probationary period Is there a probationary period? Scope $\bigcirc$ O Yes Parties O No Term of employment Commencement Probation ≮ Back Next > Professional gualification Warranties Duties Place of work Work overseas Hours of work Salary Benefits Expenses **Relocation** expenses Bonus Permanent health insurance Life assurance

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Preview

🔚 Save & Close

### Companies 2008/3229).





## Popular Automated Documents

## Corporate

Share Purchase Agreement Company Formation Documents

### Commercial

NDAs Term and Condition Creation

### **Real Estate**

Leases and Licences Rent Deposit Deeds Deeds of Variations Employment

Employment Contracts Settlement Agreements

### Private Client

Wills Power of attorney

### **Banking & Finance**

Facility Agreements Security Agreements Credit Agreements

### Litigation

Litigation Suites Court Forms

### **Intellectual Property**

Permissions Licenses Publication agreements

### Other general documents

Risk and Compliance documents Engagement Letter Offer documents



## **HighQ Solution Templates**

A sophisticated set of interconnected capabilities designed to enable legal workflows & power diverse, scalable & differentiated solutions.

- Virtual Data Room (VDR)
- Transaction Management
- Due diligence

CASES

USE

- Litigation Management
- Client portals
- Compliance Management
- Contract Lifecycle Management Digital Vaults

- Matter Management
- Portfolio/ Asset Management
- Citizen engagement
- Digitized subscription services
- Document Management
- Fund Formation

- Board Management
- **Bid Management**
- Knowledge Management
- Matter Intake
- Contract Management
- Corporate Housekeeping
- Intranet

- Claims management
- Arbitration case management
- Regulatory investigations
- Tax management
- Legal project management
- Title IX
- Public record requests

## **THOMSON REUTERS** | Marketplace

### Choose trusted solutions

- anytime and anywhere
- Easily find, demo, trial, or purchase trusted, proven solutions that can help increase ROI and expand the value of existing technology investments.



