Legal Operations: Matter & Legal Spend Management 2021 Buyer’s Guide
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Welcome to Legal Tech Publishing’s 2021 Legal Operations: Matter & Legal Spend Management Buyer’s Guide
By: Cathy Kenton and Brian Dalton

This is the second of two 2021 guides dedicated to Legal Operations, and we trust that you will find this companion guide to our earlier publication helpful to your legal department.

Today’s legal departments are embracing technology at an ever-increasing pace as they take on more and more responsibility in the enterprise. Matter management and controlling legal spend are at the top of the needs list. From managing outside counsel to reporting to the C-Suite, legal operations professionals and corporate counsel in every size organization need the proper solutions to work efficiently.

The 2021 edition of the Legal Operations: Matter & Legal Spend Management Buyer’s Guide and Above the Law’s dedicated Non-Event page are your go-to resources to identify and learn more about legal department automation.

To your success,

Cathy Kenton, CEO, Legal Tech Media Group/Legal Tech Publishing

Brian Dalton, SVP, Breaking Media
Matter and Legal Spend Management

**brightflag**

Brightflag Leverages AI in an Integrated Platform to Improve Invoice, Matter, and Legal Spend Management

**LawVu**

Manage Matters, Contracts, and Legal Spending in LawVu’s Cloud-Based Platform

**SimpleLegal**

AI-Powered SimpleReview Efficiently Drives Legal Operations with Billing Data

**Wolters Kluwer**

Passport Connects Every Part of Your Legal Ecosystem to Control Costs, Streamline Workflows, and Show You All That Matters to Your Business

Wolters Kluwer TyMetrix 360° Delivers Highly Configurable and Intuitive Cloud-Based e-Billing and Matter Management to Improve Efficiency and Control Legal Spend
Brightflag Leverages AI in an Integrated Platform to Improve Invoice, Matter, and Legal Spend Management

Brightflag uses machine learning and artificial intelligence (AI) to assist with invoice review. Once billing guidelines, budgets, and approved timekeeper rates are uploaded and approved, the system identifies anything within a submitted invoice that potentially conflicts with the billing rules and activates a flag.”

Company Name Brand
Brightflag

Product Name Brand
• Brightflag Matter Management
• Brightflag Legal Spend Management
• Brightflag Legal Service Requests (coming soon)

Latest Developments and Updates
• Awarded a US patent for innovative application of artificial intelligence and machine learning in legal technology
• Released Bill.com integration to simplify collaboration between corporate legal and finance departments
• Released Microsoft Outlook integration facilitating synchronization of emails, attachments, and notes directly into a legal matter without leaving your inbox
• Expand outside counsel performance evaluation features to support law firm performance evaluation and relationship analysis

Opening a Portal to Drive Success
Effectively managing legal spend is an ongoing challenge for most, if not all, organizations. Brightflag is an integrated platform that provides a client the ability to manage matters and legal spend. To aid and encourage engagement, law firms and other service providers can submit matters and invoices via a vendor portal that does not require a client license, and Brightflag will work with their clients’ vendors to get them set up and trained on the portal at no cost to the client. Vendors have access to Brightflag support for any technical issues. There are currently over 6,500 vendors submitting invoices through the platform, and adding matters into Brightflag can be done by either a client or vendor. If a vendor submits a matter, potential discrepancies (such as billing guideline violations, inaccurate rates, or over-budget expenses) will be flagged for review and can be accepted or rejected at the client’s discretion.

Navigation & An Informative Dashboard
Brightflag has an intuitive interface empowering a client to easily navigate the application. Upon log-in, a client is presented with an informative Overall Spend Breakdown dashboard showing a 30,000-foot view of activity within the legal department. A general counsel or CFO can see what is happening by firm, preferred counsel, department, matter category, entity, country, and more. All these data points are highly customizable. When Brightflag works with a client to implement the system, the customer success team helps the client select data points that will work best and assists with building out the necessary matter-type templates. Each user’s security level limits access to data points. Filter the dashboard to show a particular department or look at a specific date range. A client can effortlessly print out the dashboard for use outside the system.

An expandable left menu pane enables a client to access the Overview, Invoice Management, Matter Management, Financial Management, Reports, Vendors, AP Export, Timekeepers, Admin Settings, and Help Center menus.

Invoice Management
Within the application, you can submit and review invoices for an end-to-end workflow. Invoice review provides several data points, including the number of active, pending, and approved invoices. Options are available to filter invoices based on status, vendor, department, category, entities, approver, date range, and search terms. Once filter criteria are selected, a list of invoices will appear. A client can see high-level information for the invoices listed, including matter name, vendor, date, billing amount, days pending, status, and flags.
Brightflag uses AI to forecast a final budget, including upper and lower thresholds, and predict an overrun date. A client can review this information related to the overall budget, or more specifically, to a particular category.

Using the savings analysis by firm report, a client can see how their firms compare against each other in critical areas, including savings, billing excess hours, research, prohibited expenses submitted, discounts, timekeeper errors, and more.

Brightflag uses machine learning and artificial intelligence (AI) to assist with invoice review. Once billing guidelines, budgets, and approved timekeeper rates are uploaded and approved, the system identifies anything within a submitted invoice that potentially conflicts with the billing rules and activates a flag. When a client clicks on an invoice, they are directed to a line-item view that provides three columns of information. High-level invoice information is visible on the left, including a matter name, totals, and a timekeeper breakdown (such as partner, senior associate, associate, and paralegal). Additionally, a client can see the activity breakdown by phase and sub-phase billing codes, which are clickable to present a filtered view of an invoice. The center panel shows flags the system identified. A client can select a flag to include it in an invoice adjustment and click on the flag’s name to see relevant narrative lines in a list below the flags. The right panel provides a space for a reviewer to leave comments and approve an invoice. Items in the narrative section can be accepted or rejected, and adjustments can be made via a pop-up window, including available reasons for the vendor or law firm to choose. Once adjustments have been made and approved, an invoice can be routed to a final approver and submitted to a client’s AP system. See Figure 1.

Choosing a matter presents a summary screen with all invoicing for that matter. This screen displays various information, including tabs for matter details, notes, reports, invoices, financial data, vendors, budget, emails, and files. A matter timeline tracks all invoicing, and a client will see a breakdown of invoices by task, category, timekeeper billing percentage, and amount billed.

Budget Overview
Budgets can be created within or synced to Brightflag. The overview screen conveys many valuable data points, such as the number of matters without budgets, amounts of approved and pending invoices, outstanding committed amounts, total budget, and remaining budget amounts. Brightflag uses AI to forecast a final budget, including upper and lower thresholds, and predict an overrun date. A client can review this information related to the overall budget, or more specifically, to a particular category. See Figure 2 on the next page.

Integrations
Brightflag has an open API and currently integrates with several applications. In the legal and productivity space, Brightflag integrates with Microsoft Outlook and various document management, intellectual property (IP) management, and legal hold products. In the financial area, Brightflag integrates with COUPA, SAP, Workday, Oracle, and Bill.com. Business Intelligence integrations include PowerBI, Tableau, and Qlik. Integrations for identity management and single sign-on (SSO) include Okta, Google, Azure, Onelogin, and Ping Identity.

Figure 1: Invoice Review displays matter information, billing flags, and an approval pane. A client will see any issues flagged by the AI system and can make adjustments.
Reporting and Legal Spend Management
Brightflag has numerous out-of-the-box reports. They provide a variety of options to review data, including spend by month, spend vs. budget, blended rate by time, accruals, matter comparison by firm, matter comparison by country, phase analysis by firm, phase analysis by country, and savings analysis by firm. Each of these reports can be filtered and modified.

Managing legal spend can present many challenges. Brightflag assists clients by providing insight into matters and vendors allotted in their budget. Using the savings analysis by firm report, a client can see how their firms compare against each other in critical areas, including savings, billing excess hours, research, prohibited expenses submitted, discounts, timekeeper errors, and more. See Figure 3.

Pricing
Annual subscription pricing is proportional to the customer’s legal spend under management. Brightflag does not charge additional fees for upgrades, maintenance, vendor/law firm usage, ongoing training, file storage, or custom reports.

Who is Brightflag?
Brightflag was the first company to apply artificial intelligence and machine learning to legal operations management software and has invested more than 100,000 hours in its development. Using Brightflag, in-house legal teams achieve visibility into their operations, streamline internal workflows, and engage with outside counsel more efficiently. Brightflag serves a global community of in-house legal professionals and their outside counsel partners from offices in New York, Dublin, and Sydney.

Why Buy Brightflag?
• Brightflag helps companies transform their legal operations for greater visibility
• Provides a centralized space to track, manage, and report on legal requests, matters, vendors, and costs
• Automates manual, repetitive processes related to invoice review, spend forecasting, vendor evaluation, and enables more proactive decisions
• Significant emphasis placed on proactive and strategic customer service
• Enhances collaboration with external service providers

What Customers Say
Learn more about why in-house legal teams have partnered with Brightflag and what business results they’ve realized.

Figure 2: Budget Review gives an overview of a budget with additional options to examine details.

Figure 3: The savings analysis by firm report gives a client comparative insight into how their law firms are doing and who is adhering to billing guidelines.
LawVu is a cloud-based platform featuring four modules for legal ops to access multiple software tools, provide integration, and facilitate collaboration inside and outside the organization.”

**Company Name Brand**
LawVu Limited

**Product Name Brand(s)**
LawVu

**Latest Developments and Updates**
- Gmail integration accommodates users who work in Gmail and want to save their email data to LawVu.
- Google Drive integration ensures continuity across an in-house legal team’s entire work platform by syncing LawVu with Google Drive.
- A robust request for proposal (RFP) process to ensure the in-house legal department obtains competitive pricing for all outsourced legal work. Linked to the originating matter, an RFP can be sent to a number of suppliers to request both a proposal and a quote for the work being undertaken. Once the winning proposal is accepted, the relevant firm will be assigned to the originating matter as the matter manager.
- Insights dashboards are customizable and embedded to enable reporting and decision making on legal team performance, outside counsel performance, and legal spend.

**Cloud-Based Collaboration and Communication**
When in-house legal teams reach five or more staff members, they need support collaborating and communicating among each other as well as with outside counsel and legal service providers. They also need impactful tools for contract management, document management, workflow, e-signature, reporting, and analytics to support data-backed decisions. Rather than license software for each task, organizations turn to a legal operations (legal ops) platform like LawVu.

LawVu is a cloud-based platform featuring four modules for legal ops to access multiple software tools, provide integration, and facilitate collaboration inside and outside the organization. The core module, LawVu Matters, supports issue tracking, matter management, task management, knowledge management, and document management. The

**Figure 1:** LawVu-powered homepage for a business to engage the legal department with service and contract requests and legal questions answered by a knowledge base.
Contracts module manages the entire contract lifecycle, including a repository, contract automation, approval processes, audit trails, and more, and connects with Matters for important contract context. The LawVu Engage module handles all interactions with outside counsel, including managing billing guidelines and electronic billing. The Insights module uses business intelligence (BI) to report custom attributes and third-party data sources.

A Front Door to the Legal Department
LawVu works as the front door for a business to engage the legal department. The home page is completely customizable, depending on the legal business requirements. See Figure 1 on the previous page.

The platform can create and make templated contracts available for employees to use on-demand, such as nondisclosure agreements (NDAs), master service agreements (MSAs), statements of work, and supplier agreements. Templates reduce the wait-time to receive a contract—the legal department does not need to get involved ab initio. That makes the workflow process go faster, and the business achieves results without getting bogged down in legal affairs. The knowledge base is also accessible to the business to further encourage self-service.

Matter Creation
LawVu can automatically create matters from workflows, work tickets, and even email messages in Microsoft Outlook or Gmail. From LawVu's Ribbon tool, open a panel to create a matter from email. If the email includes an attached document, LawVu adds it to the matter file.

LawVu's matter grid view opens visibility to all matters for in-house legal teams. The grid or spreadsheet provides transparency into matters and offers access to track work by matter owner, entity, or registered number. See Figure 2.

The organization can create work tickets to ask legal questions. If one does not exist, a new ticket creates a matter and routes it to the law department member responsible for answering the query. Staff can see intake requests and respond with a click to join the matter from their workspace hub.

Soon, LawVu customers will be able to create matters from within an enterprise CRM (such as Salesforce) or a conversational tool (such as Microsoft Teams).

Gaining Insight
The legal team’s workspace hub is where staff can access LawVu’s features, including intake, time entries, issue tracking, matter management, and knowledge management. Add modules to the hub to increase functionality, such as contract management and engagement features, to enhance collaboration with outside law firms and vendors. Configurable reporting provides a view of activity to glean insight from LawVu’s data warehouse and integrated third-party data sources.

Finding historical advice from outside counsel can be challenging, but not with LawVu’s connected platform. A single search in LawVu’s knowledge base and document management system (DMS) triggers a united search across the organization’s legal resources, including third-party software. With LawVu’s DMS,
LawVu scans uploaded contracts with optical character recognition (OCR) support to make them searchable.

LawVu supports matter and document tagging to develop rich metadata, adding to a knowledge management database, advanced searching, and in-depth reporting.

**Reporting**
The *Insights module* reports from an organization's data warehouse, comprising data from the legal department and across the organization. LawVu provides front-end visual graphics to report on back-end structured data. You can create custom reports by combining database fields and filtering by tags or facets. For example, report on high-risk contracts, matter turn-around time, and costly matter types.

**Azure Cloud-Based with Microsoft 365 Integration**
LawVu is a secure cloud-based platform (SOC1 and SOC2 compliant and ISO 27001 certified) that runs in Microsoft Azure. It supports tight integration with Microsoft 365, Outlook, and Word. The platform supports single sign-on (SSO) using Microsoft account logins.

The LawVu panel in Outlook allows you to interact with LawVu without directly logging in to the platform. The app eliminates handling email more than once—file a message in Outlook, and LawVu forwards the email directly to a matter. You can traverse documents stored under a matter from the Outlook panel, then select to add them to an email and send them to clients or third parties.

**Pricing**
LawVu does not charge a percentage of legal spending. Pricing is based on feature implementation, customization requests, support, and training required.

**Who is LawVu?**
Founded in 2015, New Zealand-based LawVu provides legal operations support to organizations at home and in Australia, Canada, Europe, the UK, and the US. The company's primary customers are in-house legal teams in various industries. Since 2020, the company has raised more than NZ$23M in series A funding from AirTree Ventures, Insight partners, and Shasta Ventures (Source: Crunchbase). The company has more than 80 employees.

**Why Consider LawVu?**
- LawVu supports matter, document, and contract management operations in one platform that consolidates legal operations and centralizes staff training, intake, and onboarding
- Gain visibility into your team's matters, contracts, workflows, documents, knowledge base, outsourced work, spend, and data and reporting
- A single source of truth and centralized location for collaboration among staff and with outside counsel
- Data sharing across the platform consolidates legal operations reports to drive better decision-making across an organization

**Try LawVu Today!**
Start driving better business outcomes with LawVu: the in-house legal workspace. Book a demo today.
AI-Powered SimpleReview Efficiently Drives Legal Operations with Billing Data

SimpleLegal uses flexible invoice routing workflows, advanced reporting capabilities, automated accruals, and artificial intelligence (AI) to identify common billing errors.

Company Name
SimpleLegal, Inc.

Product Branding
SimpleLegal

Feature Branding
SimpleReview, CounselGO

Latest Developments and Updates
- SimpleReview uses machine learning and natural language processing to analyze invoices and identify common billing errors
- A built-in document management system stores all matter files and ingests email and attachments directly from Microsoft Outlook

Managing Legal Operations
A legal department should build processes that drive efficiencies and facilitate data-driven decision-making, allowing in-house attorneys to spend more time handling legal matters. These processes must develop and support a data infrastructure that tracks key performance indicators (KPIs) for optimal outcomes, understand legal spending across matters to calculate case budgets, and determine when to use in-house resources or engage outside counsel.

SimpleLegal is an electronic billing (e-billing), legal spend, and matter management software solution that supports data-driven legal operations departments. The company's software solution tracks, manages, and reports on legal spending. The software uses flexible invoice routing workflows, advanced reporting capabilities, automated accruals, and artificial intelligence (AI) to identify common billing errors.

AI-Powered Billing Analysis
SimpleLegal’s software includes SimpleReview, an AI process that identifies common billing errors for legal teams to accept or reject. SimpleReview uses machine learning (ML) and natural language processing (NLP) technology to analyze invoices, line-item descriptions, and report exceptions.
SimpleReview derives billing rules that are most important to customers based on a thorough analysis and review of their vast historical billing data, which are then added to a supervised ML and NLP process. Customers further influence SimpleReview through the collection and analysis of their ongoing feedback. The rules identify and alert a reviewer to potential problems in an invoice, including block billing, vague line-item descriptions, and delivery and research charges. SimpleLegal engineers, along with legal professionals, train SimpleReview and maintain the algorithm with customer feedback.

If you had to write deterministic rules and program software to identify billing errors, it would take considerable time to trust the software to identify mistakes and determine out-of-scope charges. It would require a trial-by-error process including many false positives and true negatives which you may never even see.

With SimpleReview, an AI flag highlights any problem with any line item. SimpleLegal’s AI technology digs deeper and faster than a human reviewer can to find issues such as when a partner engages in a task an associate or paralegal should perform. See Figure 1.

SimpleLegal’s AI engine identifies billing issues and allows you to adjust or reduce an invoice, or push it back to the law firm to redo, allowing the in-house legal team to spend more time practicing law than reviewing bills.

Catching billing errors offers the opportunity for incremental savings on legal spend. But the actual savings to an organization is identifying which firms should do which work. When you start looking at the work accomplished and not the bottom line of bills, you can determine an effective balance to use in-house resources or utilize outside counsel.

**Legal Billing Workflow**

When you first log in to SimpleLegal, the software’s role and group-based security settings allow users to see the invoices and analysis, and even the search results of what they are permitted to see. If you are the general counsel with administrator rights, you see all the invoice data for the organization.

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*Figure 1:* SimpleReview uses AI technology to flag an invoice line item if a task, activity, expense, or description violates billing rules derived from machine learning and natural language processing.
SimpleLegal’s AI technology digs deeper and faster than a human reviewer can to find issues such as when a partner engages in a task an associate or paralegal should perform.”

Associate GCs or other department heads only see the invoicing and data where they are responsible. See Figure 2.

SimpleLegal’s web-based dashboard displays invoice data and other items that require attention, such as matters, budgets, timekeepers, and even legal requests via a built-in ticketing system. On the left, a navigation panel provides access to software features, including matters, budgets, accruals, reporting, and legal spending.

A spend dashboard further provides charts and reports on all expenditures by vendor or law firm, practice area, and timekeepers. Review timekeeper spending in hours, rates, and various roles, such as associates, partners, paralegals, and legal assistants. Filter spending reports by vendor, matters, and other selected entries. See Figure 3 on the next page.

The SimpleLegal CounselIGO portal allows law firms and vendors to easily upload (drag-and-drop) one or more invoices in LEDES (Legal Electronic Data Exchange Standard), PDF, or other format using UTBMS (uniform task-based management system) codes. SimpleLegal validates the invoice file, and, if successful, permits the law firm to submit the bill. The SimpleLegal solution then analyzes the invoices, reports the data, and identifies errors. You can reject an invoice to automatically notify outside counsel.

Built-in reports can be exported to Microsoft Excel for advanced reporting. The software’s matter management features include a new and enhanced native document management system (DMS). When you create a matter through an intake form or use SimpleLegal’s ticketing system, the DMS can add a preconfigured folder structure to store and tag documents and perform full-text searches. The company’s Microsoft Outlook plug-in can directly send email and document attachments to the DMS.

**Technology Platform & Pricing**

SimpleLegal software runs on the Amazon Web Services (AWS) cloud in a multitenant architecture. The company’s application programming interface (API) can work with third-party DMS providers and integrate with an organization’s finance and accounts payable systems. The company’s
API makes it easy for legal departments to implement efficient, scalable, and streamlined legal operation processes that connect with other organizational units.

SimpleLegal pricing is based on an organization's legal spending. The company sells direct to organizations and through channel partners.

**Who is SimpleLegal?**

Since 2013, Mountain View, California-based SimpleLegal has helped organizations make sense of billing data to achieve strategic business goals. The company’s web-based e-billing, legal spending, and matter management software processes more than $3.4 billion of billing data annually, supports more than 170 currencies, and manages more than 615,000 matters. SimpleLegal is part of Onit, a Houston, Texas-based provider of enterprise workflow solutions.

SimpleLegal has offices in Austin, Houston, Mountain View, and Pune, India, and employs more than seventy billing professionals.

**Why Buy SimpleLegal?**

- The ease of using the full features of SimpleLegal delivers an immediate return on investment
- Configure the software using feature flags—no programming or custom-code required
- Gain deep insight into spending with minimal effort using AI-powered SimpleReview to identify billing exceptions

**Try SimpleLegal Today!**

[Request a demo](#) to chat with a product specialist, experience a walk-through catered to your specific use case, and get dedicated time for questions.

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**Figure 3:** SimpleLegal Spend Dashboard displaying a drill-down histogram of spending and trickled-up data on total hours, billed fees, expenses, and discounts.
4 Factors That Affect Your Legal Spend (and How to Unlock Potential Savings)

By: Nathan Wenzel

What if we told you that you could shave $924,900 off your legal spend each year?

According to a combination of industry data and our internal research, the right spend management platform can help you achieve that level of savings.

We’ve identified four key factors that have a significant impact on legal department budgets. We’ll walk you through how a spend management platform can help you automate more tasks, gain better visibility into your overall spend, and unlock potential savings.

1. Timekeeper Rate Enforcement

Attorneys have specific hourly rates based on their experience and expertise, which is why you should only be paying expert timekeeper rates for expert work.

Timekeeper rate enforcement ensures that you are only billed at the agreed-upon rate for each attorney. Manually monitoring rates across multiple vendors is time-consuming and error-prone. Automating timekeeper rate enforcement is the most efficient way to keep a close eye on who is billing you and for how much.

With automated enforcement, you can also set rate caps for each timekeeper role and firm. That way, if an attorney bills over their authorized rate or number of hours, the system will catch it. You can even set rules for automatically rejecting or reducing flagged invoices.

You can set rules based on factors such as:
- Attorney classification level
- Matter-level expertise
- Agreed-upon discounts
- Hourly caps (i.e., no more than eight hours per timekeeper, per day)

Tracking time by timekeeper also helps you forecast budget needs for future matters. You can refer to historical data to estimate expenses or leverage the information to negotiate alternative fee arrangements (AFAs) or blended rates with your vendors.

2. Matter Staffing Insights

You choose the vendors you work with for a reason; matter staffing insights ensure that your vendors have enough matter-level experts on staff to handle the workload.

Much like with timekeeper rate enforcement, matter staffing insights protect you from overpaying. Matter staffing, however, focuses on matching work with a person with the proper level of experience and expertise.

Think about university professors and teaching assistants (TAs). While both professors and TAs are capable of grading a multiple-choice quiz, would that really be a valuable use of a professor’s time? Conversely, if a peer-reviewed journal needs an expert to weigh in on recent research, is that really a job for a TA?

Matter staffing insights prevent you from paying a professor (high-level partner) for TA (associate) work.

Tracking the amount of matter-specific work you send to outside counsel also allows you to predict future staffing needs, both internally and externally. For example, if a vendor has only one attorney who can complete matter-specific work, you may need to find additional law firms to avoid relying on a single attorney.

Insights could also highlight a need for additional in-house experts. For instance, if your patent matter spend increases by 20% every quarter, it may be prudent to recruit more intellectual property experts for your department.

3. Billing Guidelines Enforcement

Legal billing guidelines, also known as outside counsel guidelines, define expectations for invoicing and payment. Sending vendors your billing guidelines is
Again, this kind of automated enforcement gives you tighter control over your legal spend and eliminates a lot of manual work.

4. Workflow Automation
Manual processes lead to silos — invoices get lost in someone’s inbox, budget approvals get delayed, etc. And, when you don’t have a standardized process for handling different tasks, high-paid staff end up wasting time on low-value admin work.

Consider all the steps you go through when setting up a new matter. It might look something like this:
• Collect information about the matter
• Input data into your matter management system
• Assign internal and external people to the matter
• Track progress until completion

In reality, there are probably hundreds of other small tasks that will add up to hours of your valuable time. With workflow automation, you can decide how to handle the new matter intake process and automate the grunt work.

Established workflows create predictability. When the process is laid out ahead of time, you create a single source of truth. Everyone involved knows where to look for documents, how long each part of the process takes, and who they should talk to if there is a delay.

Invoice workflow automation is a great example. Because invoices often require sign-off from several people, it’s easy for them to get held up. Workflows allow you to push invoices through the process automatically. Plus, if an invoice gets stuck somewhere, you’ll know exactly who to talk to about it.

This process also feeds into your accruals management. It’s much easier to predict upcoming spend when you can see all of the invoices in a central location, regardless of their payment status.

How Much Could Your Legal Department Save?
Narrowing in on how to increase productivity and optimize spending with these four factors is easier than you’d think. A simple Savings Calculator would let you plug in information, such as your outside counsel spend, in-house staffing salaries, and current control (or lack thereof) over a few key areas.

In just a few clicks, you could discover how much money you could save for spend management—as much as hundreds of thousands of dollars each year.
Passport offers a wide variety of analytics and KPIs both during firm selection and for reporting/evaluation."

**Company Name Brand**
Wolters Kluwer ELM Solutions

**Product Name Brand**
Passport

Latest Developments and Updates
- Integration with Wolters Kluwer CLM Matrix
  - Option for artificial intelligence (AI) bill review, hard-copy invoice conversion, and data analytics for total spend management
  - Innovations with Office Companion, Legal Service Requests, and LegalVIEW dashboards

Legal Spend and Matter Management
Wolters Kluwer Passport is a legal spend and matter management platform, one of the company's enterprise legal management solutions that also includes contract lifecycle management and analytics software. There are many applications for the platform, including matter and spend management, and claims defense.

Control Costs
Passport allows an organization to gain visibility into its legal spending to control costs. From the very first log in to a business unit, you can see a collection of dashboards and reports to choose from that inform strategic decisions, improve matter outcomes, and mitigate legal risk.

Staff can work smarter with powerful data insights and efficiently assign and manage tasks for outside counsel. Dashboards can include a user's invoices to approve, open matters, tasks, and other actionable items. Dashboards for managers include average case closures by business unit, top-rated law firms, spending by business unit, and heat maps of open matters.

Passport can automatically create matters using various modules, including a service of process and a legal services request module. For example, when a customer files an insurance claim that requires litigation, Passport creates the matter. If you need to create a matter or accomplish other tasks, simply click the Menu tab. See Figure 1.

*Figure 1*: Passport's tools menu is available to create and manage matters, invoices, budgets, and more.
Office Companion lets you manage the entire matter portfolio, invoices, and documents without having to leave Microsoft Office.”

“Passport’s financial tracking includes accruals, budgets, expenses, and invoices. A Collaboration Management module allows the organization to communicate with outside counsel on documents, budgets, rates, timekeepers, and more.”
Total Spend Management is an approach that includes AI-powered legal bill review (LegalVIEW BillAnalyzer), paper invoice conversion (Intelligent Invoice Conversion), and data reporting/analytics. Passport serves as the foundation for these advanced technologies, which can increase cost savings, billing guideline compliance, and visibility.

**Deployment, Integration, and Applications**
Wolters Kluwer can host Passport in a private cloud, or customers can deploy the platform on-premises. **Passport Office Companion** allows users to access and manage matters, invoices, tasks, documents, and even legal workflows using the Microsoft Office Suite. See Figure 3.

Office Companion lets you manage the entire matter portfolio, invoices, and documents without having to leave Microsoft Office.

Tailor Passport to meet the organization’s requirements with a library of application modules that complement and enhance the platform’s legal spend management. Modules include support for alternative fee arrangements (AFAs), eDiscovery legal hold, third-party due diligence, and more.

**Pricing**
Package pricing is available with flexible options based on the number of users and application modules.

Who is Wolters Kluwer?
Wolters Kluwer NV is an American Dutch information services company headquartered in Alphen aan den Rijn, Netherlands, and Philadelphia, Pennsylvania. The company was formed in 1987 from the merger of Kluwer Publishers and Wolters Samsom. Wolters Kluwer has more than 100 data scientists, 400-plus compliance experts, and over 50 process experts to develop and enhance products and solutions. The company operates in more than 150 countries and offers products and services to the accounting, audit, business, compliance, finance, healthcare, and tax markets.

Why Buy Passport?
- Select a law firm from preferred panels or use an AI algorithm to help choose the most optimal law firm to handle a matter
- Convert hard-copy invoices to LEDES format and analyze them using in-depth business rules and AI-powered LegalVIEW BillAnalyzer to identify line items that need adjustment
- Manage legal workflows right where you work—in Microsoft Office—with Office Companion

Try Wolters Kluwer Passport Today!
Request a Passport demo today.

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**Auditing and Reporting**
The built-in audit log in Passport allows for tracking and reporting of all system actions, which can be audited with tools like Glowroot. Passport can automatically record the addition, modification, and deletion of critical information in the system through the history utility. This captures who made a change, when it was made, and the original value of the data that was modified or deleted. In addition, the system itself records all changes and actions taken by users in an audit table that can be examined through Glowroot so any system action can be tracked and audited. Users can receive immediate notifications or alerts in a daily digest when fields are changed or removed. Passport also separately tracks a matter’s history within a matter file.

You can add child objects to matters to support multi-matter requirements, such as insurance coverage, mass tort, multistate, and multi-district litigation. Reports roll up totals for all child matters.

Passport tracks internal and external people with the matter data and assigns them a role or involvement type, such as an in-house attorney, primary internal contact, or business contact. Roles determine what data a user can view and edit. All lists, tabs, search results, etc., are filtered by security rules, which operate down to the database field level. Even Passport’s report engine, an IBM Cognos server, inherits all the security permissions assigned in the platform.

Track and report on various matter information and data points in Passport, including settlements, records, record requests, and docket information. The platform works with American LegalNet docketing software to create, send, and receive docketing events. Passport also presents actionable information in workflows using AI-powered predictive analytics, benchmarking, and data visualizations.

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**Figure 3:** Office Companion provides access to all Passport documents, emails, people, events, and tasks.
Wolters Kluwer TyMetrix 360° Delivers Highly Configurable and Intuitive Cloud-Based e-Billing and Matter Management to Improve Efficiency and Control Legal Spend

Law firms can email documents directly to a matter-specific email address and upload invoices, receive updates, and communicate with the organization in a secure portal.

Company Name Brand
Wolters Kluwer ELM Solutions

Product Name Brand
TyMetrix® 360°

Latest Developments and Updates
• Integration with Wolters Kluwer CLM Matrix
• AI-powered bill review, hard-copy invoice conversion, and data analytics for total spend management
• Continual user interface improvements support high user adoption with minimal training

SaaS Matter Management
TyMetrix 360° is an e-Billing and matter management software-as-a-service (SaaS) platform. The web-based software lets you manage matters, invoices, budgets, timekeeper rates, and more in an intuitive user interface (UI) that leads to high user adoption and minimal training.

Improve Staff Efficiencies
TyMetrix 360° is highly customizable, making it easy to streamline the management of legal matters and e-Billing to improve staff efficiencies. You can directly log in to the web-based platform or use single sign-on (SSO) support, including SAML (Security Assertion Markup Language). Customize your home screen with gadgets or widgets to work with matters, invoices, accruals, and budgets. Add widgets for recent items, assigned tasks, emails, invoices pending payment, and more.

The web-based interface is clean and intuitive, providing access to the main menu of tools and favorite links (up to five). The tools menu features separate tabs for matter management, invoices, spend management, data exchange, legal holds, and administration. See Figure 1.

Manage matters in tab-separated task views arranged by organizations, people, invoices, time entries, eDocketing, documents, and reports. TyMetrix 360° can automatically create a matter, such as from a workflow, and it's easy to set one up manually with a name, work area, open date, and status. Add team members and

Figure 1: The TyMetrix 360° UI is easy to use and learn with minimal training required to navigate and manage a matter from the left panel or the menu selections across the top.
tag them as a responsible professional (RP) who owns and manages invoice review on a matter. While you can only have one RP per matter, you may have multiple team members and member groups for matter viewing and collaboration.

If enhanced security is required, using the conceal option will hide the matter from the view of any users, including administrators, that are not designated team members on the matter. Matter invoices can be created and reviewed using standard tax codes built into TyMetrix 360°.

TyMetrix 360° features enhanced collaboration with outside counsel to improve matter outcomes. Law firms can email documents directly to a matter-specific email address and upload invoices, receive updates, and communicate with the organization in a secure portal.

Detailed business rules can automatically catch billing errors and enforce compliance with billing guidelines. For example, every line item needs a timekeeper in a LEDES (Legal Electronic Data Exchange Standard) file, but a timekeeper is not required for certain task codes.

You can also use artificial intelligence (AI) features that integrate with TyMetrix 360° to get a better handle on all spending.

Total Spend Management
Managing outside counsel spend is a top priority for corporate legal departments. TyMetrix 360° uses AI, machine learning, and data analytics to reduce spending leakage, marshal cost savings, and make data-driven decisions.

AI-enabled review improves outside counsel’s adherence to billing guidelines. TyMetrix 360° works with LegalVIEW BillAnalyzer to analyze invoices and highlight line items that need adjustment based on best practices to meet external counsel guidelines. The software incorporates AI-powered predictive analytics and benchmarking to provide actionable data in workflows and pre-built dashboards.

TyMetrix 360° also supports AI-enabled invoice conversion to LEDES format, adding visibility to all submitted invoices. If a vendor cannot create a LEDES file, it can send a PDF file to a designated email where it is read and turned into a valid LEDES file. See Figure 2.

Improve decision-making with easy to run reports that provide real-time visibility into legal spending and other performance metrics, including more than 30 best practice reports available in TyMetrix 360°. Filter the actionable data to meet requirements and schedule reports to run at regular intervals.

Deployment, Integrations, and Applications
TyMetrix 360° software is part of a secure hosted cloud environment that is managed by ELM Solutions. Flexible administration tools provide the capability to fine-tune, administer, and configure the SaaS platform using graphical tools—no coding required. See Figure 3 on the next page.

Pricing
Package pricing is available with flexible options based on the number of users and application modules.

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**Figure 2:** The TyMetrix 360° interface presents straightforward access to review, approve, and comment on invoices and line items.
Who is Wolters Kluwer?
Wolters Kluwer NV is an American Dutch information services company headquartered in Alphen aan den Rijn, Netherlands, and Philadelphia, Pennsylvania. The company was formed in 1987 from the merger of Kluwer Publishers and Wolters Samsom. Wolters Kluwer has more than 100 data scientists, 400-plus compliance experts, and over 50 process experts to develop and enhance products and solutions. The company operates in more than 150 countries and offers products and services to the accounting, audit, business, compliance, finance, healthcare, and tax markets. Wolters Kluwer extended its Enterprise Legal Management (ELM) solutions in 2019 with the acquisition of CLM Matrix, targeting legal operations across all industries and focusing on midsized to enterprise companies.

Why Buy TyMetrix 360°?
• No-nonsense UI makes it easy to manage matters and review invoices to meet outside counsel guidelines
• Option for total spend management, which includes AI-powered tools to convert hard-copy invoices to standard formats, review line items for exceptions to rules, and analyze actionable data

Learn About TyMetrix 360° Today!
Request a demonstration to learn more about TyMetrix 360°.

Figure 3: TyMetrix 360° allows users to create easy custom forms to collect vital information from both internal and external parties. The Law Firm Case Assessment form is an example that facilitates gaining early insight into the vital fact patterns of litigation.
Collaboration & Enterprise Legal Management (ELM)

MOXTRA
Power a Private Digital Channel for Your Law Office with Moxtra

Onit
Onit’s Enterprise Legal Management Solution Helps You Assess Legal Spend, Increase Collaboration, and Improve Workflow Efficiency

Xakia
Xakia Legal Hub Streamlines Department Outcomes and Value
The 2020 Small Business Digital Resilience Report showed an increase in the number of consumers who said digital capabilities are a primary requirement for small service providers.

Company Name Brand
Moxtra, Inc.

Product Name Brand
Moxtra Customer Collaboration Platform powering OneStop Customer Portals

Latest Developments and Updates
• Application Programming Interface (API) version 6 and Software Developer Kits are available for custom configurations and integrations with law firm computer resources
• Compliant with W3C Accessibility Guidelines version 3
• Web and client apps maintain support for end-to-end AES-256 encryption

Living in a Digital World
The client-lawyer relationship relies on trust and communication. In today’s digital world where clients and prospective clients demand immediate attention, law firms need a digital or virtual branch to communicate with them and deliver services. Supporting that perspective, the 2020 Small Business Digital Resilience Report showed an increase in the number of consumers who said digital capabilities are a primary requirement for small service providers. The Moxtra OneStop Customer Portal offers to build strong law firm brands around client-centric communication and services. The company’s namesake portal makes it easy, seamless, and frictionless for clients to engage with attorneys anytime and anywhere.

Responsive Team-Oriented Workspaces
With Moxtra’s OneStop Customer Portal, you can create a workspace for each case or matter to provide responsive services to clients, oversee the firm’s communication, and gauge performance levels toward meeting client objectives. To maintain an appropriate level of protection, clients and staff use two-factor and optional biometric fingerprint and facial recognition authentication to access Moxtra.

Moxtra develops web-based, Windows, and mobile apps for Apple iOS and Google Android that work on phones and tablet.

![Figure 1: It's hard to get lost in Moxtra's mobile (left) and web app (right). A team section allows you to select private channels for one-on-one conversations. A project section lists a client's open projects with the firm where multiple staff members may be associated with a project.](image-url)
computers. There is a native desktop app also under development. Those software vehicles tie into the Moxtra OneStop Portal, supporting user and role-based security to authorize project access. Other role-based permissions are also available using a firm’s established access controls.

When clients log in to the portal, whether on the web or from a mobile device, they can see their top talkers at the firm and they can review a history of work and project discussions which may include third-party engagement with experts and outside attorneys.

The portal comes with a complete suite of teamwork-oriented capabilities including secure messaging, video meetings, e-signatures, and document collaboration to redline, annotate, and edit content. See Figure 1 on the previous page.

Communicate and Collaborate with Confidence
Legal professionals can send and receive text, voice, and video messages with clients in the portal which functions as a secure messaging center. Moxtra powers your OneStop Portal in an environment designed to meet the security requirements of even highly regulated industries. The portal meets the cross-border regulatory requirements of the Securities and Exchange Commission (SEC) and the Financial Market Supervisory Authority (FINMA) of Switzerland. Advanced capabilities enable the portal to log and capture conversations per geolocation standards including the European Union’s General Data Protection Regulation (GDPR) and the Second Payment Services Directive (PSD2). Moreover, Moxtra documents every interaction sent and received in the portal where you maintain visibility of all communications.

Moxtra takes a conversational approach to messaging and sharing content with clients. When you select a project from the list it looks like a chat string. The conversation and collaboration happen in the workspaces as Moxtra logs every message and file related to the project to ensure all important data is maintained. Each action, event, and document has a thread for collaboration. It is easy for clients to enhance information storage with visuals by taking pictures or capturing video on their phone or tablet and uploading them to Moxtra and the same is true for scanned documents. Legal professionals and clients can connect to a local or shared drive to upload any file types and Moxtra will render it and make it available in the project. See Figure 2.

The portal collaboration features give clients immediate feedback that would typically take hours, even days, to accomplish. Moxtra renders files uploaded to the portal in a proprietary format to enable annotations and collaboration on a document. You can download the original copy or a PDF version with the annotations for use in disconnected or other appropriate situations. You can also share

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Figure 2: Moxtra’s project interface is a familiar chat listing of conversations, documents, images, and videos. You can add files from numerous sources including a local device or a network share.
Moxtra powers your OneStop Portal in an environment designed to meet security requirements of even highly-regulated industries.”

screens, co-browse materials, and host or attend real-time meetings with clients. For additional flexibility, you can record any conference for review and reference.

Moxtra’s asynchronous tools allow clients to review material at their leisure. Law firms can create audio-visual annotations on documents to present and disseminate exact details to clients. The same feature lets you easily send out regular communications to clients with embedded videos for added clarity.

Adaptable Client Engagement
The portal can present documents such as intake forms, payment systems, and review-and-approval workflows to clients. Moxtra’s API can call another system application or a payment processor such as Stripe or Plaid. You can share online binders or folders of files, to-do lists, and scheduling features in order to plan and detail case progress internally or with clients. The portal maintains an organized record of all shared files with categorization tools for flexible data management.

To streamline interactive processes, Moxtra can present clients with transactions for approval. When a client selects a transaction, data and options are provided using API-connected applications. Enhanced activity tracking is provided by notifications that are available for most events in Moxtra such as when new tasks or documents are completed.

Sign Here Please
You can prepare documents for convenient client e-signature by setting up a record to sign. Drag and drop functionality allows fields to easily be placed on a form with options to configure the document order of appearance for the signing process. See Figure 3.

Clients can e-sign documents using text boxes on the web, they can select a preset signature, or they can sign their name with a finger on a phone or tablet. If users sign in to Moxtra using two-factor authentication, it saves many steps in a compliant signing process.

During the signing process, Moxtra logs all the activities and alerts clients as steps are completed. When the signing is complete, clients can download the files to a secure folder on the desktop that ensures no document changes. Moxtra also discreetly adds a document ID to signed pages.

Your Portal to Success
The portal supports custom white labeling to enhance branding. Moxtra makes it easy to configure the site, whether adding new features or changing the brand appearance, to make the portal more appealing and functional for clients.

Figure 3: Set up a document for e-signature in Moxtra by dragging and dropping signature, date, and text fields onto a form.
Law firms deploy Moxtra’s portal in a private cloud, a multi-tenant Amazon Web Services (AWS) cloud, or on premises. At the top of the portal’s multi-layered architecture, the user interface (UI) supports custom conversation templates and workflows. A collaboration layer interjects a range of Moxtra collaboration tools and an integration layer connects Moxtra with third-party applications.

Moxtra uses webhooks to integrate legal applications and facilitates connection to WhatsApp and WeChat to manage and monitor client interactions on social platforms. The company’s software development kit (SDK) and application programming interfaces focus on iOS and Android development. To support the web, the company uses JavaScript SDK and representational state transfer (REST) APIs.

Subscriptions
Moxtra is available on a per-user subscription basis depending on the total number of clients and internal users accessing the portal. The essential subscription includes all features with some add-on options such as launching a private labeled app or embedding Moxtra into an existing legal application. Other options depend on the deployment choice in the cloud or on premises.

Who is Moxtra?
Founded in 2012, Cupertino, California-based Moxtra arose from its co-founders’ roots in WebEx. Moxtra’s co-founder and CEO, Subrah Iyar, was the co-founder and CEO of WebEx Communications until its 2007 acquisition by Cisco Systems. Moxtra’s co-founder and CTO, Stanley Huang, was a senior director of engineering at WebEx and Cisco Systems. The company aims to reimagine business collaboration in the age of mobility. The name Moxtra combines the words mobile with extra. The company lets law firms power and manage high-touch digital channels with a suite of collaboration features for their clients under their own brand. Moxtra offers its services to global customers, of which 20 percent consists of law firms. The California company has additional offices in New York, London, Singapore, Sydney, and Bengaluru, India. Moxtra holds US patents for unified communications for online collaboration and a family of patents for online binders.

Why Buy Moxtra?
• Drive ongoing client relationships with a private, branded app for your law firm
• Manage identities, designate roles and responsibilities for staff, and design interactive workflows to ensure appropriate communication and information sharing with clients
• Centralize document storage and engage clients with comments, notes, and audiovisual materials
• Record and preserve all interactions with the client to make a searchable audit trail

Try Moxtra Today!
Contact Moxtra to see how we can support your practice.
Onit's Enterprise Legal Management Solution Helps You Assess Legal Spend, Increase Collaboration, and Improve Workflow Efficiency

The legal operations dashboard presents an overview of pending outside counsel budgets, active or closed matters, pending invoices, year-to-date spending, and other related items.

Company Name Brand
Onit

Product Name Brand(s)
Enterprise Legal Management (ELM)

Latest Developments and Updates
• The Bodhala acquisition adds AI-powered analytics for legal spend and market intelligence
• Automate NDA streamlines the NDA process using artificial intelligence
• The newly released online App Catalog has more than 5,500 applications and solutions built on the Apptitude platform
• InvoiceAI provides artificial intelligence-assisted review with legal invoices

Enhancing Collaboration
Onit provides a collaborative environment to enhance enterprise legal management. Straightforward navigation allows for easy access to various features and information, starting with an expandable top-left corner navigation. The menu gives the user access to reporting options, legal requests, retention of counsel, a knowledge repository, matter information, invoicing, vendor information, timekeepers, and timekeeping rates. The top bar shows what area of the system you are working in, along with a quick start button to access intake forms and a global search bar. For consistency, five primary screens comprise every Onit solution: Dashboards, Intake Forms, Notifications, Record, and Grid.

Dashboards
Dashboards are configurable for different users like a frontline lawyer, a practice or legal operations manager, or a top-level attorney or general counsel (GC). There are informative visualizations, or widgets, suited for every role. A frontline lawyer's dashboard could display everything they need, such as timekeeper approvals, pending or overdue invoices, open matters, and pending tasks. The legal operations dashboard presents an overview of pending outside counsel budgets, active or closed matters, pending invoices, year-to-date spending, and other related items. When reviewing a top-level dashboard, a GC can see in-depth information generated from Tableau, which is embedded in the solution and provides a dynamic and analytics-driven view of data. Every data point in a visualization can be used to access a report. For example, a standard report for matters by country shows a world map with the ability to generate a list of matters for a particular country or region while providing matter-specific information.

Intake Forms
There are several types of forms within Onit, all designed for simplicity, including new matter intake, task, contact, and status update. Forms are dynamic, template-based, configurable according to client needs, and utilize if/then logic to minimize manual data input. Additional fields based upon conditional logic may become available as you select information from particular drop-down menus.

Any single value or combination of values can drive automation and workflow. For example, if a particular matter is selected, the system will automatically assign that manager's paralegal; or if a specific matter type is created, a set of tasks are automatically generated. Document management (DM) workspaces can leverage templates to drive automatic document creation.

Notification
Notifications are configurable, information or event-driven (such as new matter, new task, or invoice approval), and you can embed required actions in a notification. For example, when an invoice is submitted, a notice will go to a team member with the relevant information for
the invoice and include embedded actions that are required to review and approve the invoice.

**Record**

Every record in Onit has five elements: data, workflow, actions, collaboration space, and participants and their roles.

An overview appears across the top, including matter name, type, budget, and invoice total. When an action takes place, it becomes available in the tabs. For example, adding a task to a project will insert a task tab. Every record has some workflow associated with it that is visible in the right panel and represented by a drop-down menu. Below that are action items represented by blue buttons, including Add Document and Add Task. Every record has a collaboration space for posting comments or showcasing activity. Finally, every record has a section identifying participants and their roles (i.e., approver). See Figure 1.

The integration of document management systems facilitates the creation of a document tab with the necessary folder structure built by following system rules mapped during DM implementation. A user can work in the document management system within Onit, minimizing the need to move between programs.

**Grid, Reports, and Searching**

The Grid is made up of rows and columns for straightforward data assessment. For example, to look at all invoices in the system, you can pull up the invoice grid from the expandable navigation pane. Every row displays an invoice, and every column shows a field. Think of grids as advanced spreadsheets. Reorganize fields by dragging and dropping, and everything is sortable and clickable. Complex searches can be generated, without sophisticated experience, with field filters for entering relevant criteria in the respective drop-down menu. Create a report by filtering all necessary fields and saving it as personal or public or exporting the report. Bulk actions can be taken on the grid screen for invoice approvals.

Global search is available across all data throughout the system. Results look and feel familiar, similar to what you see in Amazon, including filtering options on the left panel. You can filter results by App (such as invoice or matter), result type (like transaction or comment), vendor name, invoice number, matter type, or area of law.

Onit delivers approximately 200 highly interactive reports across nine reporting suites, as well as some additional categories. Options are available in the expandable menu on the left, including matter, GC, savings, law firm, timekeeper, self-service, and audit. The additional categories include a timekeeper rate report, budget to actual, diversity spend, matter count, and vendor matter detail.

Figure 1: A record shows logistical information along the top with tabs representing actions that have taken place. Workflow appears on the right with blue action buttons, a collaborative space, and a list of participants and their roles.
Select a category or suite to start an initial report with a dashboard of tabs across the top, filtering capabilities down the left, and the primary report information with interactive visualizations in the center. Every dashboard tab provides at least one, and up to four new reports, and every clickable data point generates a new report. For example, if a user clicks on the Timekeeper Suite, the ELM standard report appears, including rates, task codes, staff classifications, and timekeepers. The filtering area on the left includes areas of law, matter type, and matter status. Click on any data point to be taken to that area in the system. See Figure 2.

Vendors, Budgets, and Invoices

When creating a vendor, Onit accommodates a wide array of fee arrangements that drive billing rules, including hourly, blended rates, and fixed fee. Select matter and vendor-related attributes to drive automation, such as volume or early pay discounts, requesting a budget, and statement of work requirement.

The budget collaboration tool enables a client to send a budget request with a link for a vendor to submit a budget. This doesn't require additional licensing fees, allowing all activity to occur in one place.

― BillingPoint is Onit’s billing portal for vendors to manually enter an invoice or upload a LEDES-formatted invoice, providing real-time collaboration. When an invoice is submitted, the system can utilize artificial intelligence (AI) to run validations and audits and generate an alert when an invoice falls outside billing rules.”

Figure 2: This highly active report from the Timekeeper Suite shows several dashboard tabs, filtering information, and interactive visualization with key reporting information.

Figure 3: All areas needed to adjust and approve an invoice are available and easy to navigate, with the invoice broken down into easily consumable pieces of information.
BillingPoint is Onit’s billing portal for vendors to manually enter an invoice or upload a LEDES-formatted invoice, providing real-time collaboration. When an invoice is submitted, the system can utilize artificial intelligence (AI) to run validations and audits and generate an alert when an invoice falls outside billing rules. As an invoice is ready for review, a user sees a screen showing information from the invoice, alerts, recommended adjustments, a breakdown of line items, timekeepers, fees, and expenses. Because an invoice is just another record in the system, a user has all the benefits of the standard record set up from the workflow area, action buttons, and the collaboration area. See Figure 3 on the previous page.

**Integrations**

Onit integrates multiple applications empowering users to work in those systems while staying within Onit to reduce jumping between programs. Document management systems like iManage, NetDocuments, and eDocs are available, as well as other software including Outlook, a Microsoft Word add-in, and native integration with Tableau and Slack. Service process integrations include CT and CSC. Onit considers accounts payable (AP) and most master data sources, such as a human resources (HR) system, as standard integrations and will work with a client’s single sign-on (SSO) protocols.

**Pricing**

Onit offers Enterprise Legal Management as a standalone product or as a solution on our enterprise platform, Apptitude. Our ELM solution can also be combined with our other offerings: contract lifecycle management, legal holds, legal service requests, and other workflow solutions.

**Who is Onit?**

Onit is a global leader in enterprise workflow and process solutions for legal, compliance, sales, procurement, IT, HR, and finance. In the last 10 years, the Houston, Texas-based company has grown and now encompasses enterprise legal management, contract lifecycle management, legal holds, and configurable workflows while focusing on driving efficiency through automation. The company has more than 10,000 law firm customers and 600 corporate customers, with 35 in the Fortune 100. Onit has more than 500 employees and secured a $200 million investment from K1 Investment Management in 2019.

**Why Use Onit?**

- ELM enables you to better manage, track, and analyze legal spend and reduce risk across all of your matters
- AI streamlines and simplifies the invoice review, adjustment, and approval process
- Automate and optimize legal and business processes to save time, improve overall performance, and increase efficiency
- A no-code platform provides flexibility to automate tasks and meet client requirements

**Try Onit Today!**

For more information or to schedule a demo, visit [www.onit.com](http://www.onit.com).
Xakia Legal Hub Streamlines Department Outcomes and Value

"Xakia provides visibility into legal operations and workloads, makes matter intake and triage consistent and transparent, manages legal spend and outside counsel assignments, and empowers data-driven decisions."

**Company Name Brand**  
Xakia Technologies Inc.

**Product Name Brand**  
Xakia

**Latest Developments and Roadmap**
- Enhanced existing functionality to collaborate with external resources (such as law firms)
- Salesforce integration to increase efficiency and unify data
- DocuSign CLM integration to facilitate a secure e-signature process

**Comprehensive Matter Engagement**
Xakia Technologies is an all-in-one platform born of the need for in-house counsel to manage and prioritize workloads, receive work, report to stakeholders, and demonstrate legal team value to the organization. Xakia provides visibility into legal operations and workloads, makes matter intake and triage consistent and transparent, manages legal spend and outside counsel assignments, and empowers data-driven decisions.

The platform is built around four key features: legal matter management, legal intake and triage, legal spend and external counsel management, and legal data analytics and reporting. The platform is API-driven to integrate with an organization’s existing systems, including email, contract, and document management systems (DMS).

**Legal Matter Management**
Xakia’s **matter management** provides workload visibility across your team, using tools to efficiently capture, track, and manage workflow. Xakia features a straightforward user interface with powerful database and workflow capabilities that are surfaced intuitively and as required to minimize visual noise for users and provide immediate, actionable insight into legal work. In Xakia, it is easy to search and find information quickly to analyze data for intake, matters, and litigation trends.

Matter management in Xakia is a broad concept, including contract management, dispute management, and document management where required. See Figure 1.

**Legal Hub**

**Figure 1:** Xakia’s user interface provides a tabbed view of matter details, resources, discussions, notes, tasks, contracts, disputes, budgets, and documents.
Xakia features a straightforward user interface with powerful database and workflow capabilities that are surfaced intuitively and as required to minimize visual noise for users and provide immediate, actionable insight into legal.

Xakia’s dashboards include visual graphics on all matters, contracts, disputes (litigation profiles), external resources, intake, and more. You can select various widgets in a dashboard to focus on categories, complexity, and matter size.

The Matters List screen is a gateway to everyday actions to manage your workload and matter updates. You can edit a matter, add notes, and assign tasks in a slide-out panel, quickly collecting information that drives a matter forward, or needs to be automatically captured through to reporting. You can also view matters in Xakia’s Card View and arrange them in columns organized by date, status, priority, and users for those who work in a more visual or agile style. Filter matters by various aspects such as category and hashtag, and drag and drop cards in data columns for easy tracking. See Figure 2.

There are several ways to capture matter information in Xakia, including via Outlook, Gmail, legal intake, templates, and through automation tools. The form to create a matter captures all necessary information of who is working on what and why and records qualitative measures such as matter complexity and the strategic value of work. These measures aid decisions about the proper resources to apply to a matter and whether work should go to junior or senior staff, internal resources, or an outside legal service provider.

As you create an individual matter, you can build family matters, link it to Xakia’s built-in document management system, or integrate a third-party DMS (such as SharePoint, NetDocuments, or iManage). You have the option to set up custom fields for matters and display them on an intake form. To further simplify matter creation, set up templates to prefill information on a matter form.

The Dispute tab provides input for litigation management. Capture information on a claim, parties, finances, insurance, and multiple proceedings. Xakia analyzes and reports on the data, such as the likelihood of prevailing in litigation, and other trends.

Xakia supports approval workflows and maintains a post-signature database; however, it does not yet support pre-signature workflows and contract creation. The platform handles contracts differently than matters, using a separate database since contracts have many to one and one to many relationships with matters. And frequently, the legal department receives third-party hard-copy and completed agreements that only need recording and storage.

A contracts database reports extensive metadata for the organization, such as governing law, key clauses, currency, contract value, even hashtags. A new contract can simultaneously become part of a matter and contracts database or be linked to a document stored in the DMS.

Legal Intake and Triage

Legal intake processes in Xakia save the organization time and effort. The legal team can set up intake types, such as a contract approval or new employee request, and automatically route specific types to dedicated staff for triage and assignment.

Business users connect to Xakia to make and review legal requests in authenticated mode, supporting single sign-on (SSO) or unauthenticated mode via a secure link.

Figure 2: Xakia’s Card View allows for visualization of your workload and can be managed from a single screen with drag & drop to add, assign, and complete tasks, and update due dates, status notes, and more.
Either way, users can view the status of pending requests and communicate with legal counsel throughout the journey of the matter.

**Spend Management**

Matter Resources provides the ability to collaborate with law firms and external service providers. The platform features tools to receive, review, and approve invoices for legal services, while recording and tracking matter and overall budgets. The legal department can invite law firms to access Xakia and enter invoices via a dedicated external portal. Xakia manages legal spending while maintaining simplicity and communication between parties. Although Xakia provides its own features to manage e-billing, it also integrates with specialist point solutions such as Brightflag.

**Legal Data Analytics and Reporting**

Legal departments produce notable work for organizations but often lack the resources to demonstrate it or make data-driven decisions on the basis of work demands. With Xakia, you can fully understand work profiles, make informed decisions on new work submissions, and deliver informative reports to stakeholders.

Xakia’s dashboards include visual graphics on all matters, contracts, disputes (litigation profiles), external resources, intake, and more. You can select various widgets in a dashboard to focus on categories, complexity, and matter size. You can also view the complexity and strategic value of work to analyze resource expenditures. This analysis helps identify where complex cases may require more resources to succeed and where there are opportunities to optimize resources on non-complex cases of little strategic value, for example, by identifying opportunities for automation. See Figure 3.

The 29 standard reports available in Xakia show how the legal team supports their operations and highlight areas that need additional resources to improve results. You can easily view concise matter lists with metadata, matter descriptions, and status updates. You can also filter on various categories of work or work done for a specific division or group within the organization.

**Deployment and Integration**

Xakia runs in the Microsoft Azure cloud and maintains an ISO 27001 security certification. The company deploys Xakia’s legal hub in a multitenancy architecture using the platform’s all-in-one tools or integrating third-party software—all in less than one hour. Bespoke integrations and data migration require more time, but Xakia measures it by hours and days, not weeks and months.

The Microsoft Outlook add-in and Gmail extension offer an alternate path to create and manage matters from email. Other integrations include SharePoint, Active Directory, and Okta identity and access management.

The platform supports user access permissions and locations for global operations with varying data security and regional storage requirements. An audit function reports all system transactions.

**Pricing**

The platform scales up or down for per-user per-month licensing, with flexible payment options using a credit card or invoice. **Pricing** starts at $55 USD per user per month for Matter Management, Dashboards and Reports, and Legal Hub and Integrations. Add Legal Intake and Triage along with Spend Management for $70 USD per user per month. Get all Xakia features for $90 USD per user per month. Bulk discounts are available for 50 or more users.

**Who is Xakia?**

Since 2016, Xakia Technologies has provided visibility into productivity and simplified managing and reporting matters for legal operations of two to 200 staff members in global organizations. The predominantly woman-led company is privately owned and operated out of Melbourne, Australia, and Kansas City, Missouri. It has more than 25 employees in Australia, Canada, and the US, and channel partners in Canada, Hungary, Japan, Singapore, and the UK. Xakia supports all industry verticals and is used across five continents, offering the platform in eight languages.

**Why Consider Xakia?**

- Xakia deploys quickly (<1 hour) to optimize legal operations in matter management, legal spending, intake, and reporting
- Dynamic, customized forms and templates prepopulate data for recurring matters
- Integration with Microsoft Azure, Active Directory, Outlook, Gmail, SharePoint, and others, and API support to integrate third-party legal software with the platform
- Data analysis and reporting support data-driven decision making and inform stakeholders of legal operations’ value

**See it for Yourself!**

Watch a 4-min Xakia demo video to see how it can optimize the efficiency of your legal department in < 1 hour.

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**Figure 3:** Xakia provides interactive, configurable dashboards to understand the composition of legal work, to demonstrate the strategic value of work, and to inform decision making for operational efficiencies.
Thank you for reading, let’s keep in touch!

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