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HYPERIONGP

Key Solution Components

Enterprise Legal Management

Corporate legal departments require a broad and integrated set of capabilities that span the enterprise legal management lifecycle. The following Key Solution Components (KSCs) are considered fundamental requirements of a viable ELM solution.

The KSCs should be considered minimum capabilities and as a starting point for developing your own requirements and selection criteria based on your specific business needs:

Matter Management

- [ ] Support multiple matter types, practice areas, and sub-areas
- [ ] Comprehensive case information capture; configuration specific to matter types, practice areas
- [ ] Seamless integration with electronic invoicing and spend management functionality
- [ ] Availability of specialized operational and practice modules
- [ ] Task and workflow management (rule-based and ad-hoc)
- [ ] Reminders (automated notifications; reports)
- [ ] Easy-to-read matter calendar by matter, by user, by department and/or Practice area
- [ ] Organizations and contacts management (CRM)
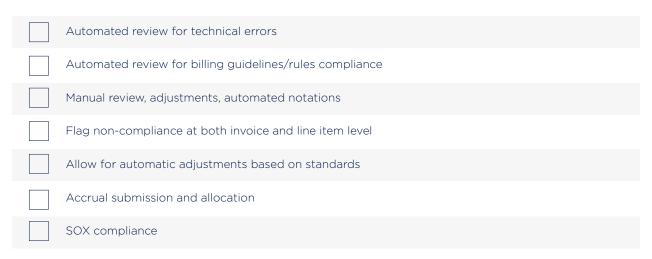- [ ] Integrated basic document management by matter

Outside Counsel and Partner Management

- [ ] Electronic outside counsel collaboration

- [ ] Support third-party/vendor account management

- [ ] Configurable rule sets configurable by firm/vendor

- [ ] Ability to configure fields, data objects specific to outside counsel management

- [ ] Performance reporting related to outside counsel work and performance on multiple components

- [ ] Support for outside counsel scorecards

Electronic Invoices and Submission Process

- [ ] Invoicing in industry standard formats

- [ ] Web-based submission

- [ ] Support for all LEDES format and alternative electronic formats

- [ ] Support for electronic manual invoice submission

- [ ] Compatibility with UTBMS codes and custom task codes

- [ ] Support for configurable alternative fee arrangements

- [ ] Support for alternative fee arrangements performance measurements.

- [ ] Collaborative budgeting and tendering

- [ ] International currency support

- [ ] Jurisdiction-specific billing rules

- [ ] VAT and other global tax tracking, management, compliance controls

- [ ] Support for "draft" invoice submission processing

- [ ] Storage of electronic supporting documents

- [ ] Approach for 100% P.O. compliance objectives

Billing Compliance

- [ ] Automated review for technical errors
- [ ] Automated review for billing guidelines/rules compliance
- [ ] Manual review, adjustments, automated notations
- [ ] Flag non-compliance at both invoice and line item level
- [ ] Allow for automatic adjustments based on standards
- [ ] Accrual submission and allocation
- [ ] SOX compliance

Invoice Review and Payment Processing

- [ ] Automated rules-based reviewer routing
- [ ] Automatic workflow routing for multistep reviews
- [ ] Automated "pre-auditing" of invoices against system rules prior to submission
- [ ] Approval of partial invoices
- [ ] Support for header and line-item level adjustments
- [ ] Notification and notations to outside law firms
- [ ] A/P transmittal process (customization for specific AP systems)
- [ ] A/P payment status posting (customization for specific AP systems)
- [ ] Law firm visibility into approval/payment status
- [ ] Law firm visibility into pre-submission data accuracy
- [ ] Automated technology assisted review (TAR) and intelligent legal review automation

Budgeting and Financial Tracking

- [ ] Flexible budget configuration; rules-based and ad hoc
- [ ] Budget by matter and by task
- [ ] Support for budget groups and "roll-ups"
- [ ] Collaborative budgeting and tendering with vendors
- [ ] Accruals by matter and by task
- [ ] Automated accruals to actual conversion
- [ ] Robust budget reporting
- [ ] Ability to compare internal and external budgets

Searching

- [ ] Intuitive Field-based, full-text and Boolean searching
- [ ] Document indexing and searching
- [ ] Multiple export formats (CSV, XML, XLS)
- [ ] Ability to report search results using analytical graphical tools

Reporting and Analytics

- [ ] Standard report library provided with the ability to export and modify
- [ ] User-available ad hoc reporting/searching
- [ ] Custom report builder toolset
- [ ] Support for decision-support analytics and Key Performance Indicators (KPIs)
- [ ] Graphical and visually rich reports
- [ ] KPI and performance metric dashboards
- [ ] Support for integrated reporting and data modeling
- [ ] Multiple report formats (RTF, DOC, PDF)

Contract Lifecycle Management

- [ ] Support for Contracts as discrete system object

- [ ] Automation of pre-signature, signature and post-signature processes and tasks

- [ ] Pre-packaged and support for configurable templates

- [ ] Document merge/assembly

- [ ] Support for customized clause libraries

- [ ] Tools for contract comparison and variance

- [ ] Store, manage and relate agreements

- [ ] Import existing paper and electronic contracts into system

- [ ] Contract terms and metadata management

- [ ] Contract compliance monitoring

- [ ] Contract analytics

- [ ] Native e-signature or third-party e-signature integrations

- [ ] Integrations with third-party CLM systems

- [ ] Integrations with third-party procurement systems

Automation and Efficiency

- [ ] Robust, configurable workflows and process automation

- [ ] Detailed task assignment and tracking

- [ ] Automated rules-based notifications

- [ ] Ability to integrate with third-party practice management systems, including Outlook, SharePoint, SAP, etc.

- [ ] Batch or bulk update of records

- [ ] Data upload from external data source

- [ ] Contact and organization management

- [ ] User collaboration

- [ ] Outside counsel access and collaboration (custom views)

- [ ] Ability to "Global Reassign" Matters and responsibilities

Usability

- [ ] Feature rich UI and intuitive, engaging UX
- [ ] Responsive design, UX consistency across platforms/devices
- [ ] Personalized views and dashboards
- [ ] Minimal clicks to perform common tasks
- [ ] Mobile accessibility and functionality
- [ ] Support for single sign-on and integrated security models
- [ ] Field-level security and UI configuration
- [ ] Internationalization/Localization