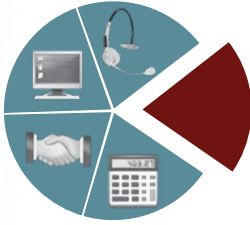




# Configured to Your Unique World

***Your work,  
your process,  
anywhere,  
any time***



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The way your legal department works is no accident. Over time, you've evolved and enhanced your processes and procedures to find the best way to get things done. That ongoing evolution is the key to your current success – so you can't rely on a software system that doesn't evolve with you.

## Configuration Means Working How You Want To

Your Legal Management Software (LMS) system should fit seamlessly into your existing processes while giving you the flexibility to continue to evolve. Good software can be configured and reconfigured through the years as your requirements change. There can be a seemingly endless amount of configurable elements in most enterprise software solutions, and LMS Systems are no exception. But, not every configurable option is an important one, nor does every system implement configuration in ways that support your existing process and future evolution. Several critical configuration areas significantly impact a software platform's capability to align with your specific requirements both initially and as your department evolves. These include data structure, user interface workflows, third-party integrations, real-time reporting, and administration/user access. Understanding what to look for in these configuration areas will help you evaluate the configurability of your spend management/matter management system – and ultimately how much room for growth you'll be buying your legal department.

### **DATA STRUCTURE**

Work with the data that's most important to you

### **USER INTERFACE**

See what you need when you need it on your dashboard

### **WORKFLOWS**

Follow the work processes that work best for you

### **INTEGRATIONS**

Incorporate other business systems into your workflow

### **REPORTING**

See what you need to see anywhere, anytime

### **USER ACCESS**

Provide a custom environment for every user



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## Fully Configurable Data Structures

Chances are, the information that's most valuable to you differs (if even slightly) from most other legal departments. It's important, then, that your LMS system can be configured to store the information you need in the format you need it. While many systems can offer some amount of custom data fields, the best software gives you the ability to create as many custom data structures as your processes require.

### Single-Instance Architectures Offer The Most Data Flexibility:

A software system built on a single instance architecture (a unique environment for every client) instead of a multi-tenancy architecture (all clients residing on the same environment) offers the most flexibility for your data structures. Your database is your own and free from any restrictions caused by sharing the structure with others.

Furthermore, the ability to create custom fields in a system is not necessarily the same as having a truly configurable data structure. Fully configurable systems will allow your custom data fields to be used in all the same ways that the standard data fields can be. That should include reporting (including report filtering), search criteria and workflow integration.

## Multi-Level User Interface Configuration

The user interface is the most obvious place for configuration to benefit the user, but many LMS systems offer limited ability to modify the user experience. However, some configurable interfaces are more meaningful than others. At a minimum, your system should allow configuration of navigation tabs, dashboards, saved searches, report layouts and filters and data input forms.

The configurability of your User interface should go beyond the areas of customization. The number of different configurations you can support are just as important. Your different departments may each want a different experience, just as your individual users may want to further refine the system to their exact needs. Ensure the system you choose offers configuration options at departmental, group, and individual user levels, enabling each user to work efficiently without compromise.

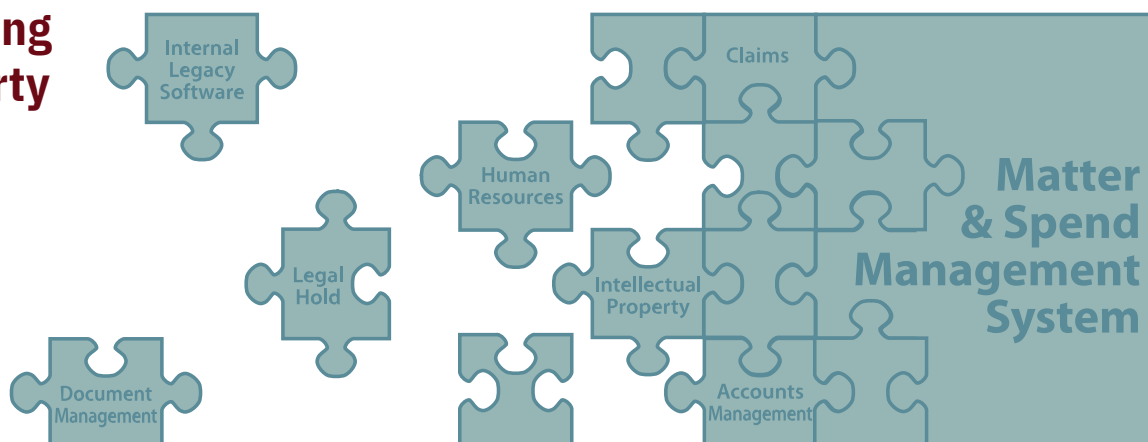


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### Completely Configurable Workflows

Workflow automation, which facilitates the seamless progression of processes from one step to the next, constitutes a fundamental feature of LMS systems. Many systems, however, will implement their vision of a perfect process and expect you to adapt to it. What if your process is unique or multi-faceted and requires additional steps? You shouldn't have to change the way you work in order to use your spend management/matter management system. However, the absence of fully customizable workflows would leave you with the options of either modifying your processes or seeking alternative methods outside your LMS system, potentially compromising the advantages of centralized system management. A suitable software system should have the capability to replicate and automate your existing internal processes effectively.

### Integrating Third Party Systems



Your matter and spend management system shouldn't be an island on its own. To fully integrate into your business processes, look for a software that can integrate with your other systems.

### Support for Integration with 3rd Party Systems

The LMS System is not the only critical software platform in your legal department. You'll avoid any delays or wasted time if all those platforms can talk to each other right from the start. Processes like invoice processing should be automatic – once a batch of invoices is approved in your LMS system, the invoices should be automatically processed by your accounts payable system. Without a system that allows for 2-way integration with 3rd party platforms, you could be required to manually migrate this data each time it's needed. And the same goes for all of the other business systems that touch your matters and legal spend.



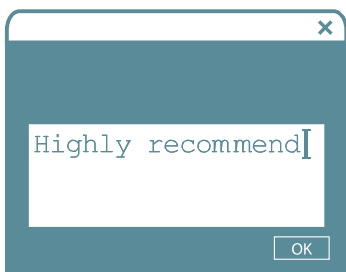
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### Create Data Confidence with Conditional Editing

Conditional editing reduces the need for (and resulting costs from) manual data verification.



For example, when a user changes the status of a matter to 'Closed', a new field can show up (and be required) that allows the attorney to enter



their comments regarding the finalization and disposition of the matter. No more closed matters without any information on how they got that way!



### API Means DIY:

Some LMS platforms will offer 3rd party integration by giving you access to their API (Application Programming Interface). That means that you have the ability to create any integration you like... so long as you program it yourself and adhere to the restrictions of the API. It's like providing you with the zoning requirements and building materials for a home and then telling you that you can build any home you want – you can do it, if you have the expertise and resources to get it done. The best LMS partners provide an infrastructure designed for 3rd-party integration and a team with the expertise to build the integrations for you. Your LMS system becomes most effective when it communicates with all your other systems: accounts payable & general ledger, intellectual property, document management, claims, legal hold, human resources and internal legacy software.

### Configurable Real-Time Reports

Every LMS system will provide you with some level of configurable reports – they are a core feature, after all. That doesn't mean that all configurable reports are the same. Many reporting infrastructures will allow that configuration only if you're willing to wait for batched data and use reports that don't reflect up-to-the-minute changes. The best LMS System platforms will offer configurable real-time reports. The ability to see the reports you designed, reflecting the exact position at that moment in time, is crucial to collaboration and data confidence.





### Highly Granular Administrative Configuration

There's more to a highly configurable system than the storage and manipulation of matter data. It is just as important, if not more so, that you can configure access levels at a very granular level. Any software should be able to prevent one practice group from seeing another practice group's matters – but platforms with high levels of configurability go farther. An ideal software provider offers comprehensive user and group-level access control across pages, reports, processes, functions, and icons. This provides you with the flexibility to restrict functionality, ensuring that users cannot make adjustments as required. Moreover, if you prefer to restrict adjustments for attorneys while granting administrators the capability to make changes, a highly configurable administration tool will accommodate this requirement. Find a tool that lets you configure access to your environment the way your department is organized and you'll never have to deal with problems caused by people going beyond what they're supposed to do.

### Conclusion

The operational framework of your department is deliberate, and when change is deemed necessary, you should possess the flexibility to evolve and address those needs effectively. Your LMS System should change with you and not keep you tethered to an old process, or a process that's someone else's idea of "the right way to do things." Don't settle for a software provider that just offers surface-level configurations and requires your team to "fit in." Find a partner that offers a deeply configurable platform and that cares to work the way YOU want to work.