



ELM Solutions

## Passport® Legal Matter Management

### Key Benefits

- Simplify and streamline the way attorneys and legal staff work
- Improve collaboration and knowledge sharing among internal and external team members
- Gain better visibility into legal risk
- Make more proactive and strategic business decisions
- Configure and extend Passport to meet new business needs

*“...optimizes legal department performance with its ability to provide a comprehensive view of the relationships between costs, financial and business risks...”*

Passport Legal Matter Management combines more than two decade’s worth of matter management experience from ELM Solutions with the power of Passport, a patented technology platform. The software, which is available as a standalone application or as a part of a suite of Enterprise Legal Management applications from ELM Solutions, enables more proactive management of legal risk. Passport Legal Matter Management also optimizes legal department performance with its ability to provide a comprehensive view of the relationships between costs, financial and business risks, legal department workload, outside counsel use, and matter status.

#### Simplify and streamline the way attorneys and legal staff work.

- Deliver the most relevant information, tasks, reminders, and reports to each team member via a highly-intuitive user interface and role-based dashboard views
- Conveniently manage day-to-day matter activities directly through Microsoft® Outlook®
- Use wizards and rules-based workflows to efficiently drive legal staff through common activities like matter set-up, automatically assign tasks, and generate reminders and notifications
- Empower staff to quickly locate the information they need, when they need it, with powerful search capabilities

#### Improve collaboration and knowledge sharing among internal and external team members.

- Use the Outlook Module to quickly and easily communicate matter updates and information and streamline their capture in the matter management system
- Easily share knowledge and work product among a global legal team with a single, secure place to track all information associated with a vast matter portfolio
- Securely collaborate with outside counsel on budgets, matter narratives, and timekeeper rates via the Passport Collaboration Portal

## Passport® Legal Matter Management

Improve visibility into risks and trends and make more proactive and strategic business decisions.

- Monitor and track the status of matters throughout their lifecycle, including their associated risk and exposure
- Leverage Passport's advanced business intelligence capabilities to produce actionable analytics and identify potential areas for cost savings or efficiency improvements
- Enjoy at-a-glance views of key performance indicators via dashboard reports that make it easy to spot trends and potential risks

Rely on a matter management solution that easily adapts to meet current and long-term business needs.

- Support unique business and user needs with Passport's industry-leading level of configurability, which allows clients to tailor screens, workflows, rules, reports, and more for both litigation and transactional practice areas
- Leverage localization features to meet the needs of a multi-national workforce
- Take advantage of Passport toolkits, which empower clients to administer, configure, and even extend their Passport solutions to quickly meet changing business needs



## Key Features

- Highly-configurable matter screens for each practice area
- Wizards for common tasks like matter creation and outside counsel assignment
- Rules-based workflows that automatically assign tasks and generate reminders and notifications
- Ability to manage matters directly from Outlook
- Calendaring and docket management
- Budget, timekeeper, and matter narrative collaboration
- Available library of best practices-based matter management report packs
- Essential document management and document assembly capabilities
- Integration with systems such as document management, IP management, and others

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