Insight Business Intelligence

Cross-matter reporting and visual analytics to help manage cases, counsel and legal costs.

Your New Dashboard for E-Discovery Management
Advanced Enterprise Legal Dashboard
Cross-Matter Reporting at Your Fingertips

Jet pilots have a heads-up display so they know how their craft is performing at all times. You need the same kind of reporting to effectively manage your cases, counsel and legal costs.

Insight Business Intelligence provides information on all your matters—delivered to your desktop, tablet or phone. Easily track the progress of your cases, counsel and even legal bills. Get key performance indicators at your fingertips in real time; not weeks or months later, when it’s too late to take corrective action.

- E-discovery management
- Cross-matter budgeting
- Key performance indicators
- Law firm and vendor billing
- Top grading and service efficiency

Take advantage of our standard dashboard or design your own. Our professional services team can customize data, reports and filters to meet your needs. And, with role-level access, team members see only the data they require.

No more juggling spreadsheets, emailing PDFs or waiting weeks to get the right information to determine whether cases are on track and matters are on budget. Insight Business Intelligence provides the data you need, when it matters most, in a visual, easy-to-read format.

Customizable visual analytics and filters let you analyze progress, performance and spend in real time, not when it’s too late to fix the problem.
Your discovery dashboard provides information about all your active matters. Each chart or graph is interactive, allowing you to drill down for more detail.

Each tab can be filtered to show specific information about individual matters.
Track documents for all your matters as they are loaded. Charts show which matters are active and specifics for each.

Daily reports let you see what data was loaded and for which cases. Filter to see a specific matter or pull in statistics from several.

Spot trends and recent case activity without resorting to spreadsheets and calculators.
User reports provide information on case and review activity.

View historical trends, then drill into specifics to determine activity by matter or by specific individuals.
E-Discovery Management

PROJECT MANAGEMENT REPORTS

Your discovery dashboard includes an individual, customizable report for each matter.

You can drill down to see progress on individual custodians along with information on responsiveness rates and production status.
Track critical discovery metrics to better manage cases and spot problems while they can still be addressed.

E-Discovery Management

KEY PERFORMANCE INDICATORS

KPIs show changes from the prior month and can be set to send alerts when they go beyond specified limits.

Hosting GBs

-32% change

5,585 prev. month

3,808

Track review progress or activity by matter. Or create your own KPIs so you can track the metrics that matter to you.

3 more filters applied

Set alert

Cancel

Review Progress (Summary by Stage)

Activity Trend (User Hours)
Insight Business Intelligence can also include information on law firm and vendor performance. Our Professional Services team can work with you to acquire the data and provide custom financial reports.

Data from your law firms and discovery vendors can be exported and loaded into an integrated data warehouse for reporting and reuse.
COUNSEL SPEND

- Track total and monthly billings by country, region, firm or date range. View total billings or drill down to see data from any active matter.

- Compare averages and effective rates to help review different firms or even “top grade” to determine who is providing superior service.

- Customize graphics to fit your data and provide the metrics you need to better manage department spend.

- Review top timekeepers and compare different firms and matters. Schedule a daily or weekly report so you can review this information as often as you need it.
**COUNSEL REPORTS**

- Track the performance of individual firms in this drill-down report. You can review firm performance by country, matter or by other criteria you select during report creation and customization.

- Compare KPIs for different cases or your top 10 cases to determine relative value.

- Monitor top timekeepers by hours and effective rate to keep budgets on track.

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**Fiscal Year Counsel Report**

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<tr>
<th>Timekeepers</th>
<th>Hours Billed</th>
<th>Total $ Billed</th>
<th>Effective Rate</th>
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<tr>
<td>Westor Rails Patent</td>
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</tbody>
</table>

**Billed per Month (Top 10)**

- Gallinano, Brennan: $218.5 K
- Anthony, Anna: $194.3 K
- Ellis, Jose: $150 K
- Deves, Skyler: $187 K
- Merriman, Sofia: $126 K
- Wilger, Matilda: $90 K

**Matter Details**

<table>
<thead>
<tr>
<th>Matter Details</th>
<th>Opened</th>
<th>Total $ Billed</th>
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<th># Hours</th>
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</table>
MATTER BUDGETS

- Track budget performance by law firm, matter or practice group.
- Run comparisons for several or all cases.

VENDOR SPEND

- Monitor current and accrued spending on discovery vendors across matters, by matter or by department.
- See spend summaries by month for processing, hosting and professional services. Plot fees by month to compare services spend with hosting.
ENTERPRISE ANALYTICS
Advanced legal operations tools to help manage cases, counsel and legal costs

Catalyst’s Professional Services team can customize visual analytics, filters and reports to incorporate data from Insight, your legal department or from other vendors, all imported into a central data warehouse managed by Catalyst.

Dashboard reports can be developed for different roles, recognizing that some people need to see only highlights, while others need more detailed dashboards. Reports can be sent via email as PDFs daily, weekly or monthly or viewed online through your computer, tablet or phone.

Insight Business Intelligence is part of the Insight unified discovery platform providing full EDRM coverage—from legal hold and collection, through processing, search, analytics, review, production and trial—backed by Catalyst Professional Services team and a global partner network.

Contact Us Today for your Discovery and Reporting needs 877.557.4273 | catalystsecure.com