

OpenText Insight BI

Manage eDiscovery matters, counsel and legal costs with cross-matter reporting and visual analytics



Make data-driven decisions across cases, budgets and outside counsel spend



Get key performance indicators delivered to a desktop, tablet or phone



Eliminate manual reporting processes and delays with vendors

No more juggling spreadsheets, emailing PDFs or waiting on outside counsel and vendors to provide information to determine whether cases are on track and within budget. OpenText™ Insight BI aggregates and analyzes information on all matters in realtime, providing valuable insight for rapid decision-making. Insight BI helps easily track the progress of cases and spend, and spot trends across cases, without resorting to spreadsheets and calculators. And, it is all delivered to your desktop, tablet or phone.

OpenText Insight Business Intelligence features

Dashboard

- Analyze progress, performance and spend in realtime, not when it is too late to fix a problem.
- Get metrics for effective eDiscovery management across all matters with interactive charts, customizable visual analytics and filters to drill down for more detail.
- Spot trends and recent case activity.
- Track documents for all matters as they are loaded.
- View historical trends and determine activity by matter or individual(s).
- Review the status of a legal hold, data collection and storage, cross-matter budgeting, law firm and vendor billing, top grading and service efficiency for a single matter or across all matters.

Key performance indicators

- Track critical discovery metrics to better manage cases and spot problems. KPIs indicate changes from the prior month and can be set to send alerts when they go beyond specified limits.
- Create personal KPIs to track metrics that matter.

Outside counsel reports

- Track total and monthly billings by country, region, firm or date range, view total billings or see data from any active matter.
- Compare averages and effective rates to help review different firms or even "top grade" to determine which firm is providing superior service.
- Review top timekeepers and compare different firms and matters.
- Compare KPIs for different areas to determine relative value and monitor top timekeepers by hours and effective rates to keep budgets on track.

Matter budget reports

- Track budget performance by law firm, matter, discovery vendors and run comparisons for several or all cases.
- Plot vendor spend, including processing, hosting and professional services, by month to compare services spend.

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Role-level access

- Provide team members with a view into only relevant data.

Project management reporting

- View review status and detailed information on the documents being reviewed, including progress on individual custodians, responsiveness rates and production status.

Reports

- Customize reports to fit reporting needs and provide metrics to better manage department spend.
 - Schedule a daily or weekly report to review this information as often as required.
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