



*Matter Report*

Number of Matters: 17

Matter Status: Open, Settled, Closed

Matters by Entity: Pharmaceuticals, Pharmaceuticals, Pharmaceuticals, Pharmaceuticals, Pharmaceuticals

Number of Matters by Status: Open, Settled, Closed

Matters by Entity: Corporate, IP, Litigation (Global), Litigation (UK), M&A

Matters by Responsible Person: Baker, Adams, Baker & Adams, Baker & Adams, Baker & Adams

Overall cost of Matters by Status: Settled, Open, Settled, Settled, Settled

Overall legal fees: Baker, Adams, Baker & Adams, Baker & Adams, Baker & Adams



All features below are available in Outlook

#### Document & Email Management

- Access matters online and offline and share documents & emails
- File emails and attachments and tag emails to automate the filing process

#### Request & Matter Management

- Have business users request assistance from the legal team via friendly forms and keep track of status and KPI's

#### Knowledge Management

- Promote documents as knowhow and access/search for knowledge documents and templates

#### Template Management

- Connect standard documents with matter types to ensure compliance and up-to-date template usage
- Embed matter properties or Document ID's in documents or footers as unique references

#### Entity Management

- Register and manage entities
- Manage corporate documents
- Create appointments and reminders for important tasks

#### Contract Management

- File contracts and view contract dashboards
- Activate contract renewal warnings

#### Advanced Search

- Simplify your search by using advanced filters and preview functionality
- Save searches for quick retrieval of frequently used data sets

#### Project Management

- Convert best practices and Excel checklists into matter task lists and milestones
- Include standard documents and instructions for end-user reference and compliance
- Use tasks to keep track of matter progress, finance and deadlines

#### BI Reports

- Create advanced reporting dashboards for e.g. claim handling or billability reporting

#### Secure Collaboration

- Set up data/deal rooms for legal teams and invite external users

## What our customers are saying:

"In this agile world and era of fast IT innovation it's great to work with this trusted partner. Transform Data International's consultants have both the experience and consultancy skills to support us to align business with technology. It is a pleasure to work with these experts."

**Mr. Jos Meuwissen, ICT Manager,**  
**Boels Zanders advocaten**

"Custodian for Legal fits perfectly with the needs of our legal department and it aligns with our IT department's Microsoft Office 365 strategy."

**Ms. Sarah Wijns, General Counsel,**  
**Terumo Europe**

#### About Transform Data International

Transform Data creates context based systems on the principle of "Business First, User First" and has a specific focus on professional and financial services organizations, law firms and legal departments. Our solutions strengthen the adoption of Office 365 and SharePoint to ensure the optimal use of information within organizations. We help organizations to optimize their employees' total productivity by combining documents, tasks, workflows, external data and reports into one context based user interface.