

ELM Solutions

ELM Companion for Office

The next generation interface for seamlessly managing legal workflows and tasks within the Microsoft® Office Suite.

ELM Companion for Office helps your corporate legal and claims departments get more done by allowing staff to perform day-to-day matter and spend management activities directly within the Microsoft Office Suite.

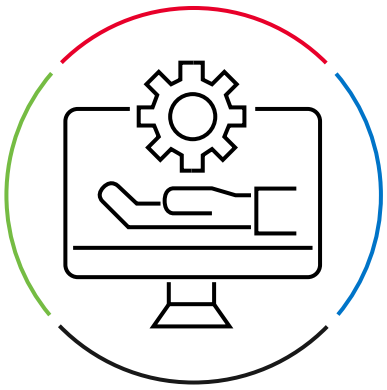
With single click access to matter creation available directly from Outlook®, Word®, Excel®, or PowerPoint®, and a customizable favorites list that ensures quick and easy access to current matters, legal professionals can more easily and efficiently manage their entire matter portfolios directly within the productivity tools they are most comfortable using.

ELM Companion for Office helps streamline Passport matter and spend workflows with an easy-to-use, intuitive interface that allows users to quickly and easily access all the emails, documents, narratives, calendars, events, tasks, and people associated with a matter – all while working directly within Office.

By empowering users with tools designed to be compatible with how they prefer to work, ELM Companion for Office saves time and improves productivity for users, encourages greater usage and adoption, supports high quality collection of matter-related information, and fosters a culture of collaboration internally and with external legal service providers.

Key benefits

- Streamlines management of matters by making the capture of documents, updates, narratives, tasks and events quick and easy.
- Embeds invoice review workflows right inside your inbox.
- Drives user adoption and system usage by all members of your legal or claims department.
- Encourages collaboration internally and with legal service providers.
- Enriches reporting and analytics with comprehensive data collection and auditing.



Users can quickly view their matter-related information, including emails, documents, and notes – all without switching applications.

Wolters Kluwer



The most comprehensive and most flexible productivity offering for enterprise legal management in the industry

- Leading edge usability, performance and breadth of functionality built on Microsoft products and related technologies.
- Event-driven connectivity eliminates constant data synchronization and ensures data and information is always up to date.
- Centralized deployment and administration reduce IT costs and eliminate time consuming desktop rollouts.
- Flexible and modular architecture allows for new apps to be easily deployed to support a wide range of legal workflows.
- Supports multiple versions of Office (Office 2010, 2013, 2016 and O365).

Key features

→ Single click access to matter creation, directly from Microsoft Outlook, Word, Excel or PowerPoint.

→ Swiftly locate current matters and all related data in a personalized list of favorites.

→ Client-configurable, dynamic matter summary pages provide visibility to matter number, status, open and close date, practice area, and matter type.

→ Find what you need quickly and efficiently using the powerful search, drag-and-drop and quickfile features of the integrated Global Documents App.

→ See at-a-glance details for every invoice: billing organization, matter name, number, invoice and submission dates, days in queue, invoice history, status, messages, and flags.

→ Drag and drop emails, documents, and other attachments to and from corresponding matters in seconds.

→ Timekeeper rate definition and billing rules enforcement – users can assign panel timekeeper rates by role, and Passport automatically enforces panel billing guidelines during invoice review.

→ Review, approve, adjust, and reject invoices right in your inbox; drill down to the line item, add comments, reason types and manage supporting documentation.

→ Edit documents with convenient check-in and check-out functionality. Document status updates are tracked and displayed automatically, with revision histories available for review right inside Microsoft Office.

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