



**Umbria**  
by prosperoware

# Financial Matter Management for Client Transparency



 LITERA

prosperoware

Prosperoware Umbria is the financial matter management platform for law firms. It enables partners, legal project management, and pricing departments to plan, alert, monitor, and report on matters, allowing firms to deliver matters within scope and expected budget.

Umbria allows firms to flexibly plan for any matter scenario in one place, without relying on disparate Excel sheets.

It allows partners to stay informed on the progress of their matters and meet client expectations with efficient, accurate and relevant reports.

## Umbria enables firms to:

- Empower partner-client relationship and win new business.
- Increase fee and cost predictability.
- Deliver greater client value and transparency.
- Optimize profitability and improve realization.
- Initiate matter plans from historical data, templates, or blank plans.
- Plan by phase, task, activity, location, time period multi-year, user named phases, and hourly or alternative fee arrangements.
- Test different matter scenarios and predict overruns using what-if, write-down, or discount analysis.
- Efficiently create accurate and visual dashboards through a widget-based architecture with 300+ out-of-the-box and custom KPIs.



### Integrations

Practice Management Systems

Active Directory

HR Systems

Human Workflow (self-initiated)



### Plan Multiple Different Ways

Historical Matter Data

Map Phases to eBilling Codes

↓ ↓

**TEMPLATING**

Top-down/  
Bottom-up

Hourly/Alternative Fee Arrangements

User Named Phases

Location

Recurring Amounts/  
Retainers

Portfolios



### Alerts & Monitoring

Threshold Alerts	Other Alerts
↓	↓
WIP/Billed/ Billable	Recurring Values
With/ Without Adjustments	Escalation Alerts
Write-Off/ Collected	Scheduled Alerts
Expenses	



### Dashboard & Reporting

Widget-based dashboards

Monitor multiple budgets at once

300+ Customizable KPIs

Flexible Outputs



### Decision Support Tools

What-If

Write-Down

Burn Analysis

Rate and Cost Increases

# MAJOR FEATURES



## Integrations

Umbria integrates with Practice Management Systems (Aderant, Elite, Elite 3E, Rippe Kingston), Active Directory, Human Resource and other systems to allow firms to create plans, add resources and select rates.



## Flexible Planning for Any Level of Complexity

Plan in any way you need to fulfill client expectations hourly or by alternative fee arrangements. Plan at a top level or break down by phase, task, activity, location/cost center, periodic, recurring amounts and user named phases, to name a few. Utilize out-of-the-box templates and historical matters to create new plans. Prepare to report what the client wants by mapping multiple eBilling codes to phases. Plan ahead for multi-year matters with rate and cost increases and test different scenarios with What-If Analysis.



## Monitor and Alert on Anything You Can Imagine

Ensure matters stay within budget and time by setting up email alerts and notifications on anything from WIP, Billed, Billable, Collected and Write-Offs. Schedule Threshold, Escalation and Recurring Alerts with configurable templates to receive notifications in a timely manner and create global alerts for client, client families and matter portfolios. You can also attach additional content such as Excel reports, PDFs and custom URLs.



## Widget-Based Dashboard for Efficient Reporting

Tailor reports the way they best work for you through custom Widget-Dashboards. Select from pre-defined dashboard layouts or your customized options. Mix and match widgets and visualizations such as grid, pie chart, stacked chart, etc. Choose from 300+ KPIs to report on or create your own. Export dashboards and reports via Excel, PDF, or PNG.



## Decision Support Tools: What-If, Write-Down and Burn Analysis

Enable partners and pricing departments to make the best planning decisions for any matter and client. Understand multiple scenarios with What-If Analysis and Customizable KPIs. Forward forecast with simple discounts and alternative fee arrangements. View the impact of adjustments during the matter lifecycle with Write-Down and Burn Analysis.

*"We can report on any data point within Umbria. High-end users can use the raw data and transform it in any way they want. The flexibility to do the reports the way we want saves us a lot of time and manual work."*

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