



**Umbria**  
by prosperoware

# Financial Matter Management for Client Transparency



 LITERA

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# 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."*

**AmLaw 200 Firm**



We are a thought-leading enterprise software company for collaboration systems. Our core competency is our expert understanding of enterprise systems data and processes in organizations, and developing technology for digital transformation. We develop software for improving adaption and governance for collaboration systems and financial matter management.

Our customers include 50% of the Global Top 20 and AmLaw 200, 67% of AmLaw 100, 25% of UK Top 50, more than 40 global corporations including Fortune 500 and the Big Four accounting firms.