



PSO

LegalOne



Stefan Kim

Partner/CSO

stefan@psaconsulting.com



Bjørn Tore Aurlien

Senior Director

bta@psaconsulting

But first...



‘One More Thing...’



[PARTNER NEWS](#)

PSA unveils pervasive Legal AI capabilities with Custodian AI+

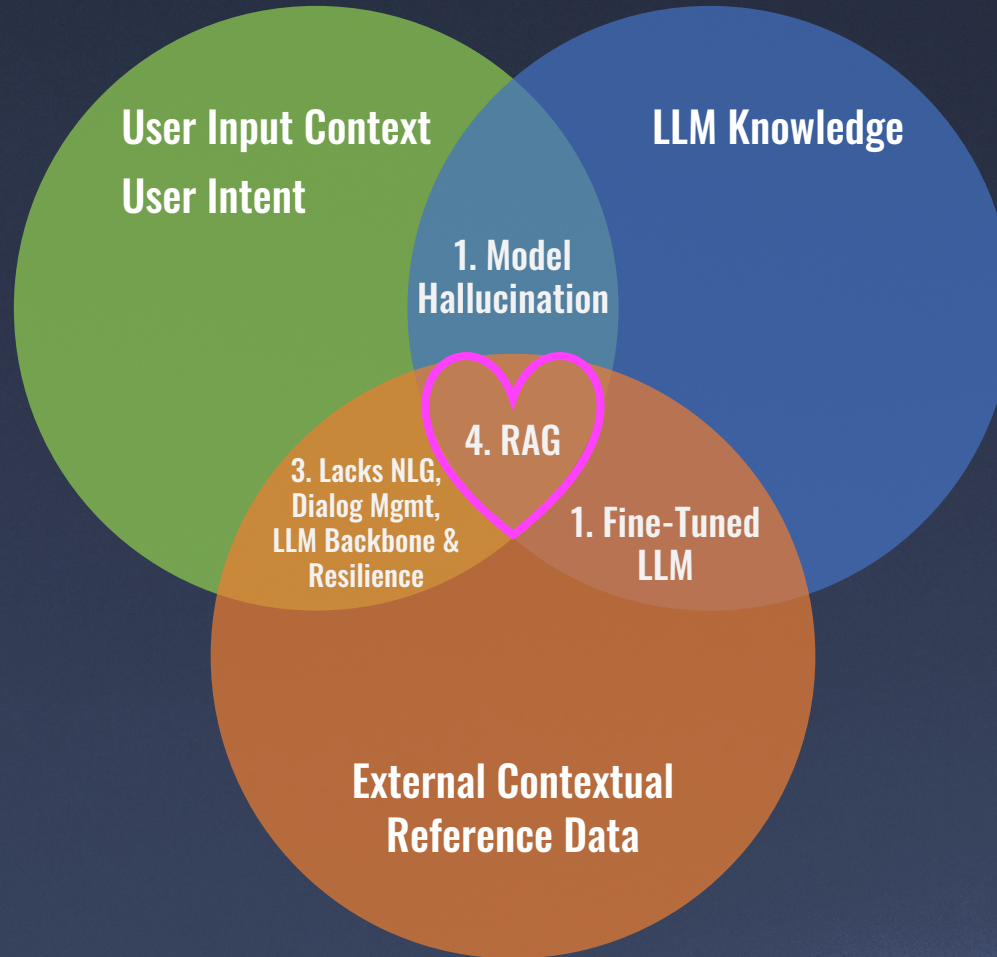


Share article

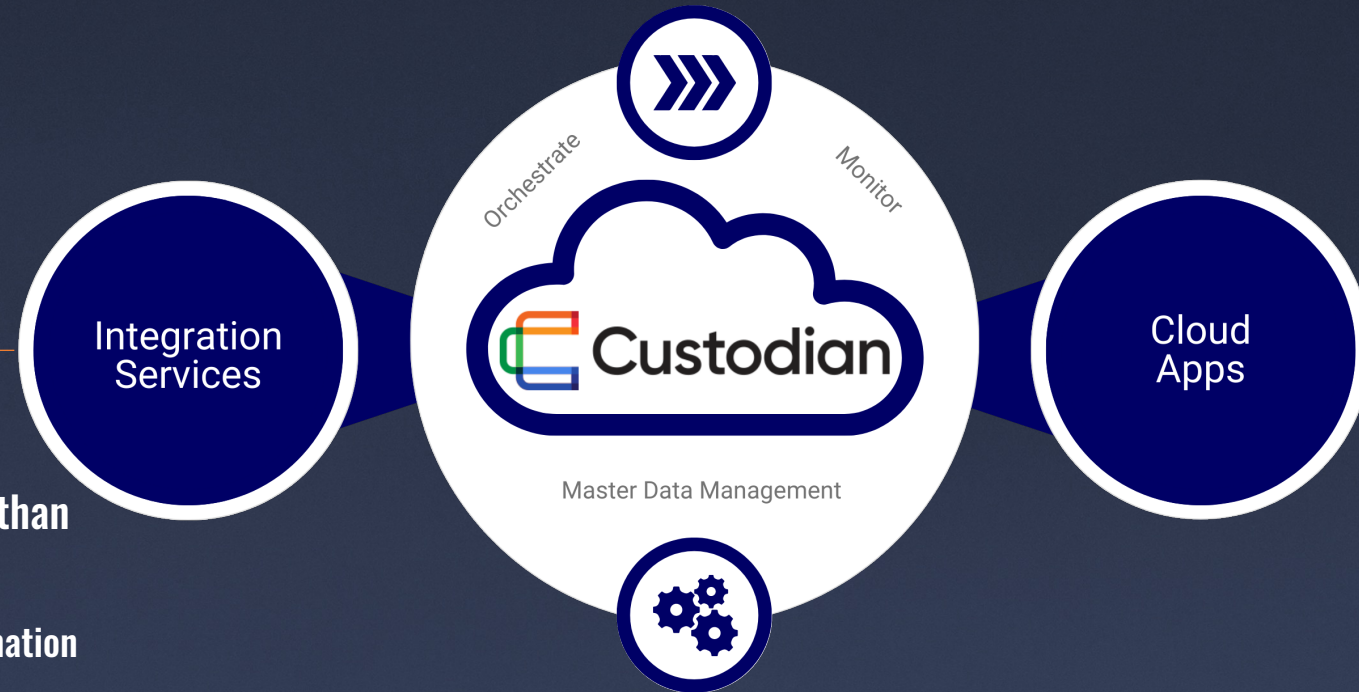


Oslo, Norway - October 16, 2023 - PSA today announced the release of Custodian AI+. Powered by OpenAI and a Retrieval-Augmented Generation model, Custodian AI+ is set to redefine how law firms and in-house legal teams unlock the collective knowledge stored in their documents, emails, and business data.

All the RAGe



The Custodian Platform.



Standard connectors to more than 45 apps and services

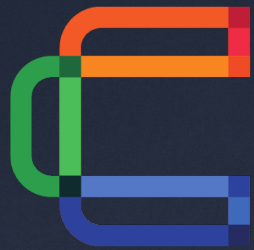
- :: Document Management & Automation
- :: A/P, A/R and Payment Automation
- :: HR, Payroll, Travel & Expense
- :: ERP, PMS/PSA and CRM
- :: Data Intelligence Services
- :: Digital Signing & QES

Cutting-edge integration architecture

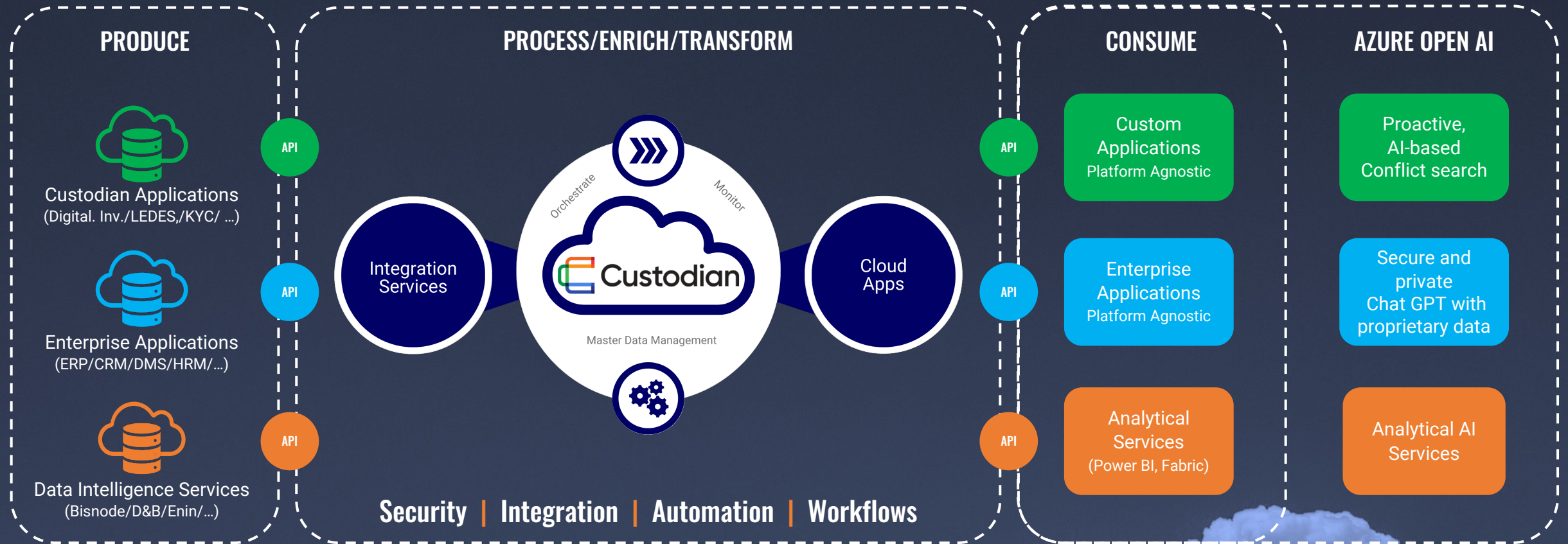
- :: Master Data Management
- :: Transform, enrich and validate payloads
- :: Delta database
- :: Event-based or Scheduled integrations
- :: Rest, SOAP, GraphQL, MS Graph, Webhooks, sFTP
- :: Active monitoring and notifications

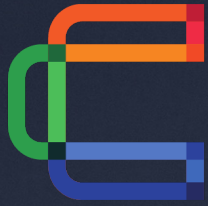
Cloud apps and microservices

- :: Client Onboarding (KYC/AML)
- :: Productivity Apps for iManage
- :: Productivity Apps for ERP
- :: Azure User Provisioning
- :: Analytics & Reporting

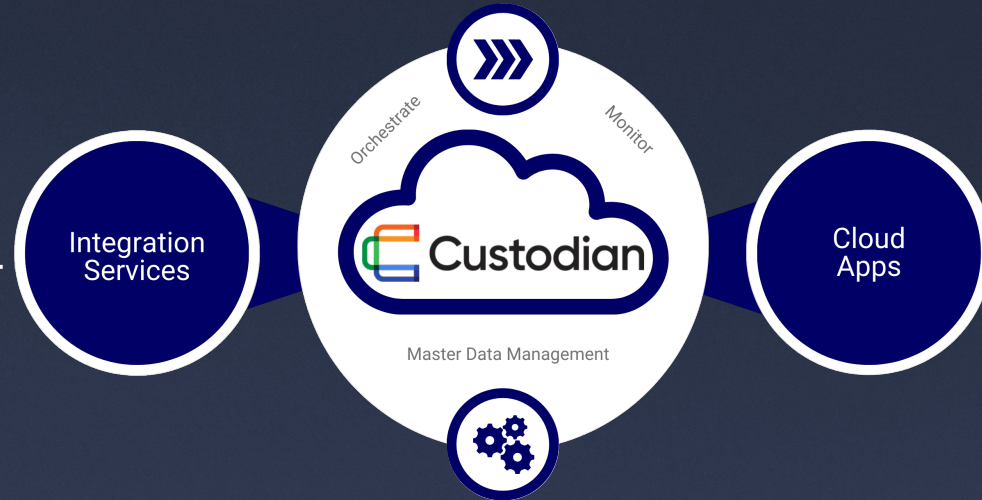


Custodian AI+

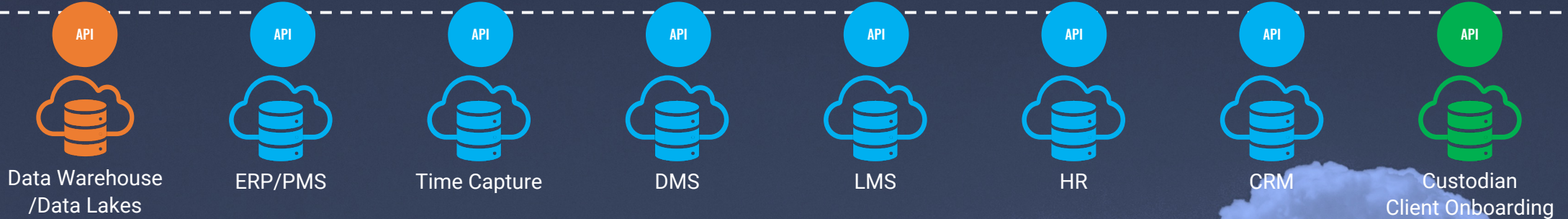
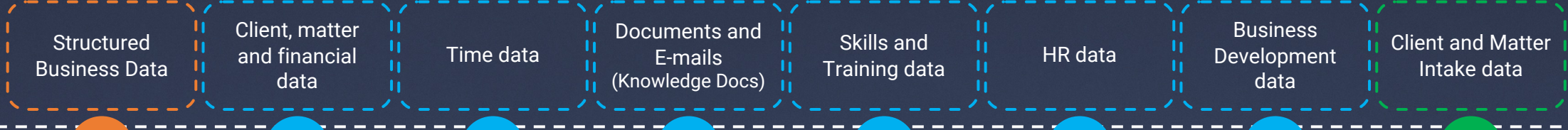


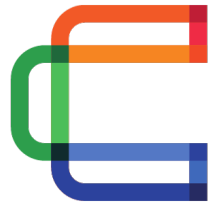


Custodian AI+ Data Sources

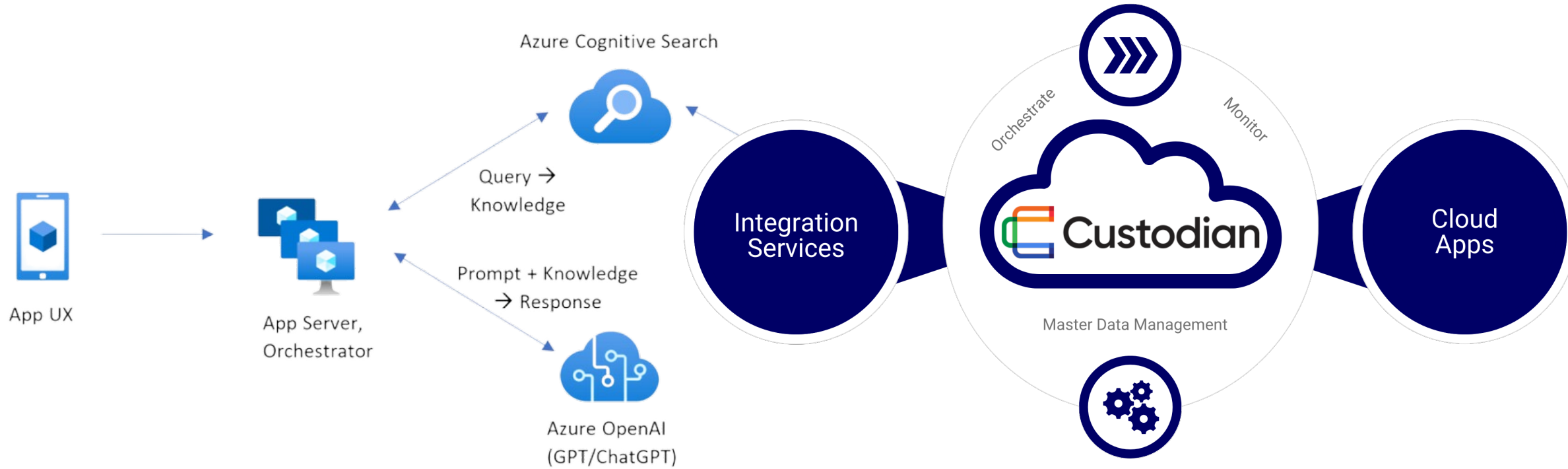


Documents added by user





Custodian AI+





Can you summarise all hours in a table by client and employee?



Finished working

Show work ▾



Finished working

Show work ▾

The summary table breaking down the hours by client and employee has been generated.
You can [download the CSV file here](#).

Anything else you'd like to dive into?



Can you provide the table here?



Finished working

Show work ▾



Certainly! Here's a sample of the summary table breaking down the hours by client and employee:

Client	Employee	Hours
Apple	Chris Stapelton	19.54
Apple	Luke Combs	20.02
Apple	Martina McBride	22.28
Apple	Taylor Swift	21.93
Big Machine Records	Chris Stapelton	15.04
Big Machine Records	Luke Combs	15.02
Big Machine Records	Martina McBride	13.82
Big Machine Records	Taylor Swift	13.97



Moving beyond documents...

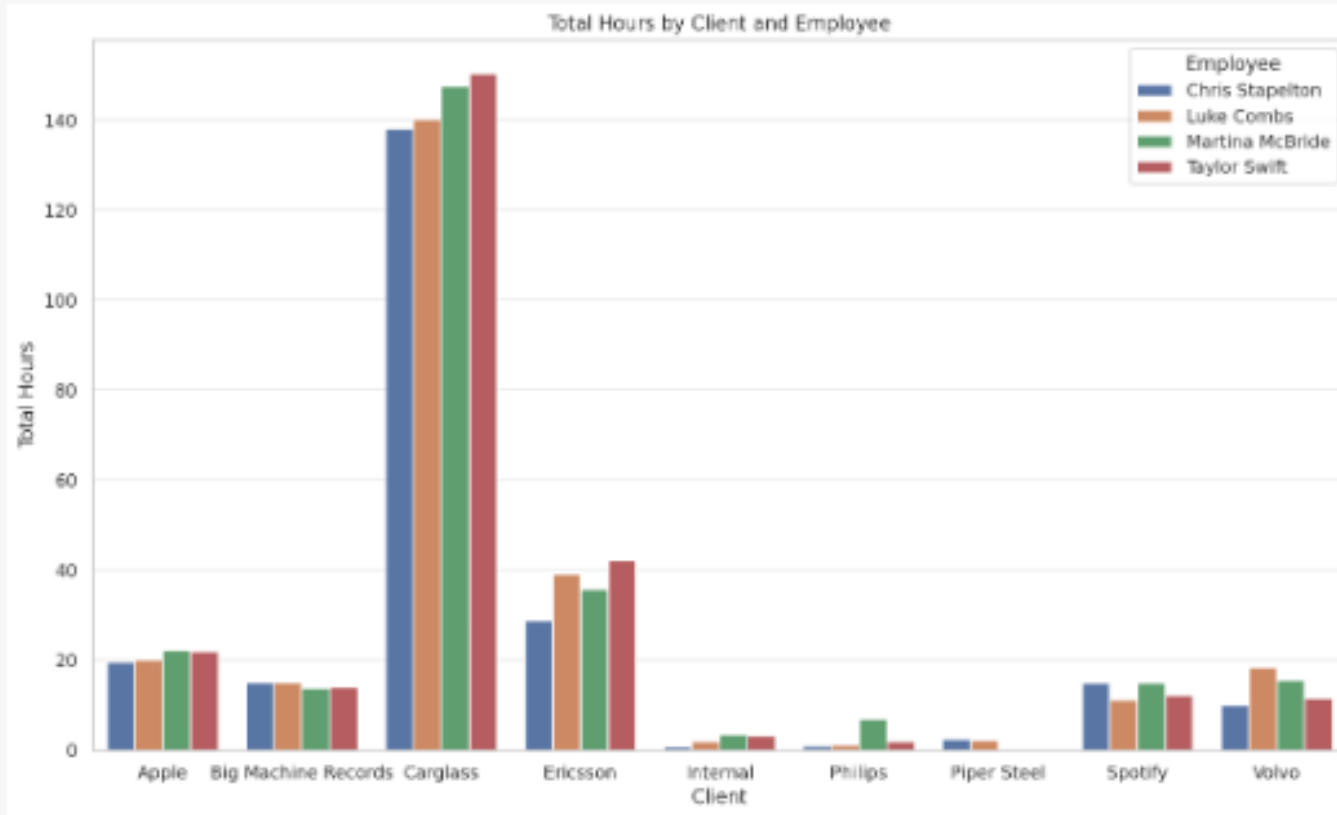


Can you provide this info as a stacked bar chart?



Finished working

Show work



Here's a stacked bar chart that visualises the total hours spent by each employee for each client. The different colours in each bar represent the hours contributed by individual employees.

Is there anything else you'd like to know or explore?



Moving beyond documents...

What employees participated in the 02/02/2023 meeting with Carglass?



Finished working

Show work ▾



On the 2nd of February, 2023, the meeting with the client Carglass involved just one employee: Luke Combs.

Anything else you'd like to find out?



Can you tell from the description who participated from the client's side?



Finished working

Show work ▾



There were two meetings with Carglass on the 2nd of February, 2023, and the descriptions are as follows:

1. "Meeting with ABV (on-site)"
2. "Meeting Herman and Inga"

From these descriptions, it appears that ABV, Herman, and Inga participated from the client's side.

Would you like to know more?



Moving
beyond
documents...



Can you identify any occurrences where the number of hours differ even though two employees seem to have participated in the same meeting (looking at date, matter and employee)?



Finished working

Show work ▾



I found 92 instances where more than one employee participated in a meeting on the same date for the same matter, but the number of hours logged differs among the participants.

Would you like to take a closer look at any of these instances or perform further analysis?



Can you provide a CSV file with these anomalies?



Finished working

Show work ▾



I've saved the data related to the inconsistent meeting hours in a CSV file. You can [download the file here](#).

Is there anything else you'd like to investigate or explore?



Moving beyond documents...



Finished working

Show work ▼



Certainly! Here's the updated table showing the number of documents produced per client, along with the average number of hours spent per document:

Client	Number of Documents	Hours	Average Hours per Document
Apple	167	83.77	0.50
Big Machine Records	108	57.85	0.54
Carglass	1162	576.37	0.50
Ericsson	253	145.88	0.58
Internal	31	9.70	0.31
Philips	21	11.25	0.54
Piper Steel	14	4.70	0.34
Spotify	85	53.24	0.63
Volvo	112	55.65	0.50

The "Average Hours per Document" column shows the average number of hours spent on producing each document for a given client.

Anything else you'd like to know?



Please sort the rows by average hours per document



Finished working

Show work ▼



Certainly! Here's the table sorted by the average number of hours spent per document, in descending order:

Regenerate



Combining data sources

Chat history

- German civil code - Amtsgericht
- Pricing analysis - Real Estate transactions
- Share purchase agreement
- Vendor friendly indemnification clause
- Examples of "Act of God" in relation to US contracts

< 1 2 3 ... 7 >



Stefan Kim
stefan@psaconsulting.com

Chat



No messages here yet
Send a message to chat with AI

From the perspective of a US corporate attorney, working with mid-market SaaS solutions, helping the company's German subsidiary contract with German corporate customers, what are some key differences between US and German law to consider? Please cite sources both from legal summaries and the German Civil Code. ➔

LLM Model

GPT-3.5

GPT-4

Data Sources

iManage

- Knowledge database
- Selected Client(s)
- Selected Matter(s)
- Selected Author(s)
- Date Range
- Selected Language(s)
- Selected Jurisdiction(s)

CRM

- CRM
- Client Onboarding
- ERP
- Selected Document(s)

Verbosity 2/10

Temperat... 2/10

Documen...



Select or drag and drop a PDF t...

Add to database

Show documents in database

MVP | RFP Responses



Chat history

- German civil code - Amtsgericht
- Pricing analysis - Real Estate transactions
- Share purchase agreement
- Vendor friendly indemnification clause
- Examples of "Act of God" in relation to US contracts

< 1 2 3 ... 7 >

LLM Model

GPT-3.5

GPT-4

Chat



CA

Custodian AI 2 minutes ago

iManage supports several authentication methods. According to the iManage Cloud Service & Security Data Sheet, the system is certified with ADFS, PingFederate, and Azure ADFS identify providers, and is configured with a wide variety of other providers that are also SAML 2.0 compliant.

The iManage Cloud also supports OpenID Connect (OIDC), a modern authentication standard based upon OAuth 2.0. OIDC is generally easier to configure and support than SAML 2.0 and is supported by all commonly used IDP vendors including Microsoft (ADFS, Azure AD), Okta, and PingFederate.

There is also an option of Directory Synchronization. The iManage Cloud subscription includes access to a utility that will synchronize users and groups from the company's LDAP directory to the iManage Cloud user directory.

SK

Stefan Kim 2 minutes ago

Can iManage customers receive copies of the SOC reports?

CA

Custodian AI 2 minutes ago

Yes, iManage customers can request copies of the SOC reports. As per the "iManage Cloud Service & Security Data Sheet" document, these documents can be requested from your account representative if they have not already been provided to you.

SK

Stefan Kim 1 minute ago

Give me a short description of iManage Cloud

CA

Custodian AI 1 minute ago

The iManage Cloud is a comprehensive Software as a Service (SaaS) offering that delivers iManage's professional work product management solution. It enables organizations of all sizes to have access to iManage's industry-leading solutions without the need for in-house implementation or back-office infrastructure. The iManage Cloud delivers enhanced security, scalability, and performance typically available only to large organizations. This solution is built on a secure, high-availability platform, accessible via multiple devices with stringent security and compliance measures in place. This information is referenced from the iManage Cloud Service & Security Data Sheet.

SK

Stefan Kim 1 minute ago

Where is iManage data stored for European customers?

CA

Custodian AI 1 minute ago

For European customers, iManage data is stored in data centers located in the Netherlands (West Europe) and Ireland (North Europe), according to the "iManage Cloud Service & Security Data Sheet". Primary data center is in the Netherlands and the secondary is in Ireland.

Type a message



Data Sources

iManage

- Knowledge datab...
- Selected Author(s)
- Selected Jurisdic...
- Selected Client(s)
- Date Range
- Selected Matter(s)
- Selected Langua...

- CRM
- ERP
- Client Onboarding
- Selected Docum...

Verbosity 2/10

Temperature 2/10

Document name:



Select or drag and drop a PDF to query (40MB max)

Add to database

Show documents in database



Q&A

Kiitos

Grazie

Bedankt

Gracias

Obrigado

Danke

Takk

Thank You.

Tak

Tack

Dzięk

Merci

Aitäh

Paldies

Dėkoju



psaconsulting.com

custodian.no