



PSO

The Nordic Legal Tech Experts

LegalONE



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But first...



‘One More Thing...’



[PARTNER NEWS](#)

PSA unveils pervasive Legal AI capabilities with Custodian AI+

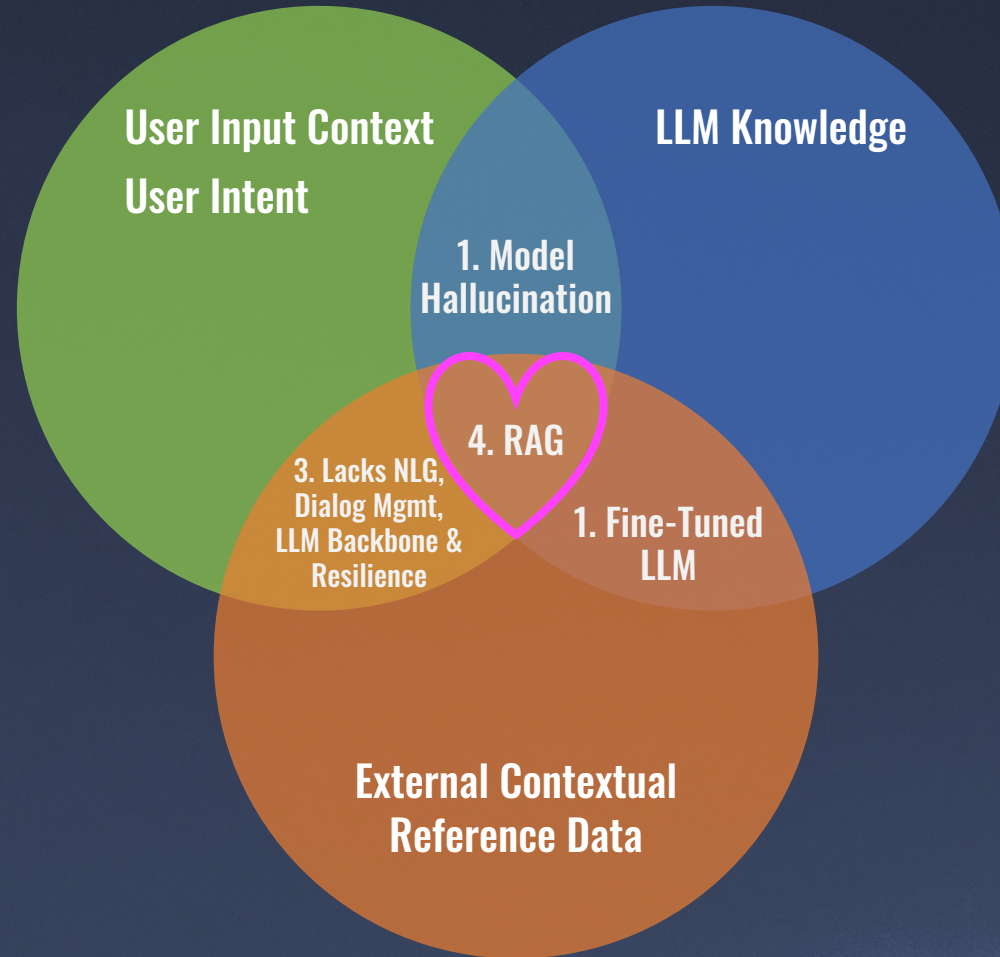


Share article



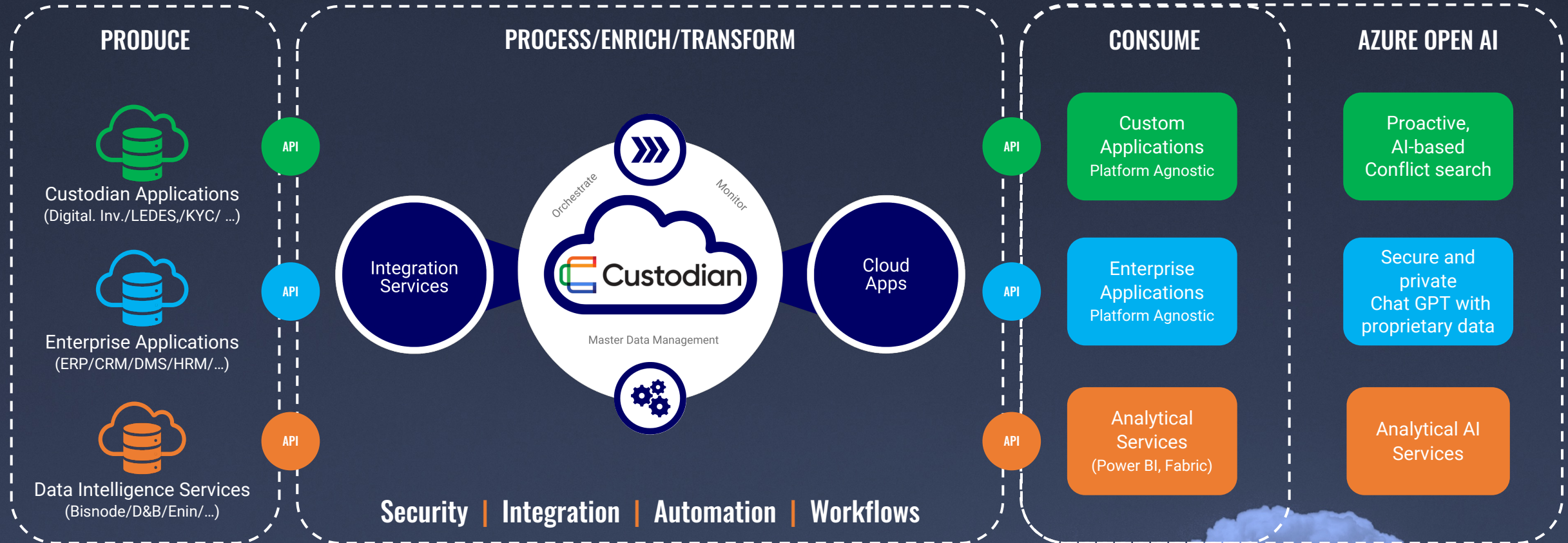
Oslo, Norway - October 16, 2023 - PSA today announced the release of Custodian AI+. Powered by OpenAI and a Retrieval-Augmented Generation model, Custodian AI+ is set to redefine how law firms and in-house legal teams unlock the collective knowledge stored in their documents, emails, and business data.

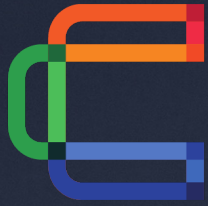
All the RAGe



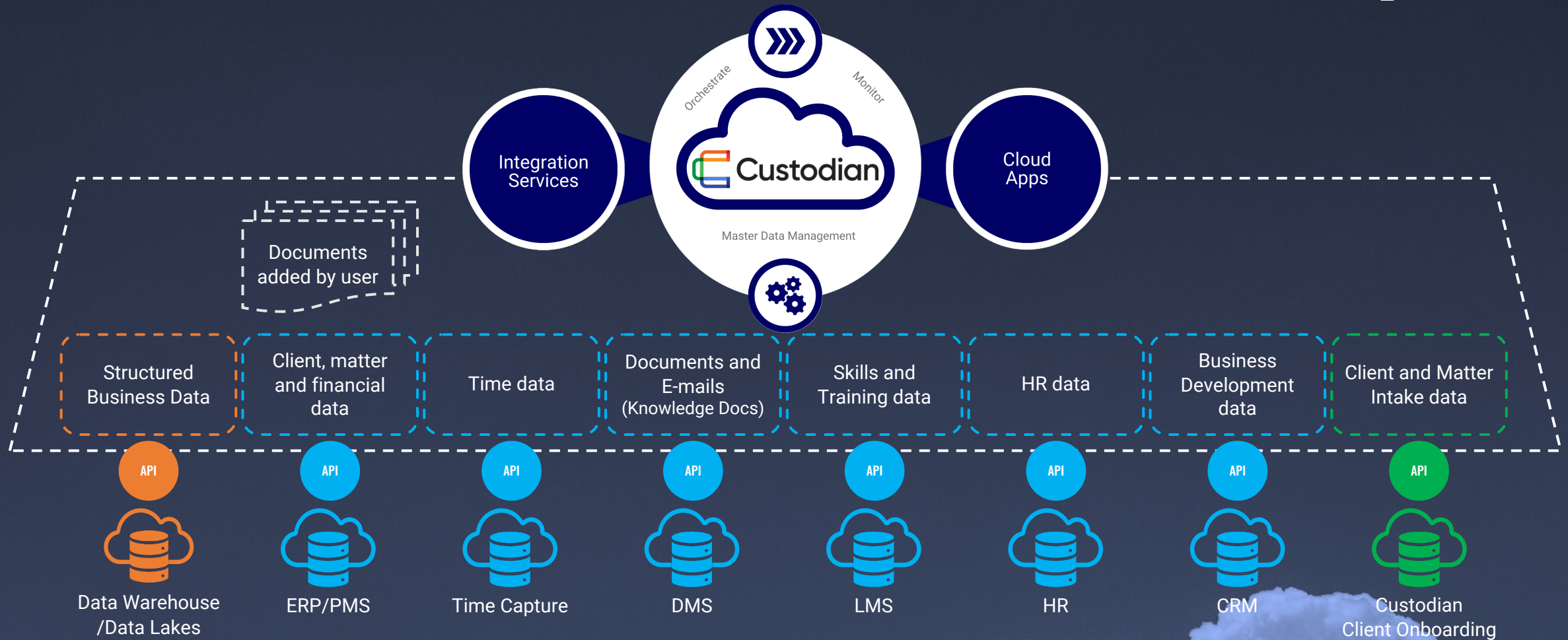


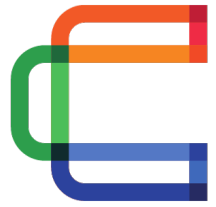
Custodian AI+



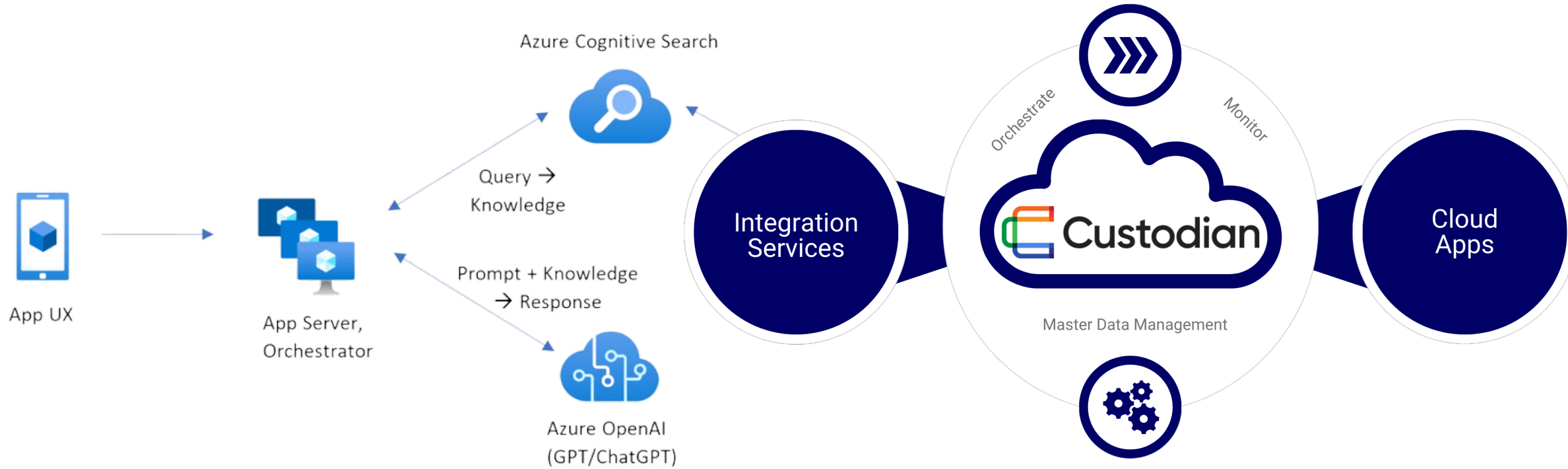


Custodian AI+ Data Sources





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...

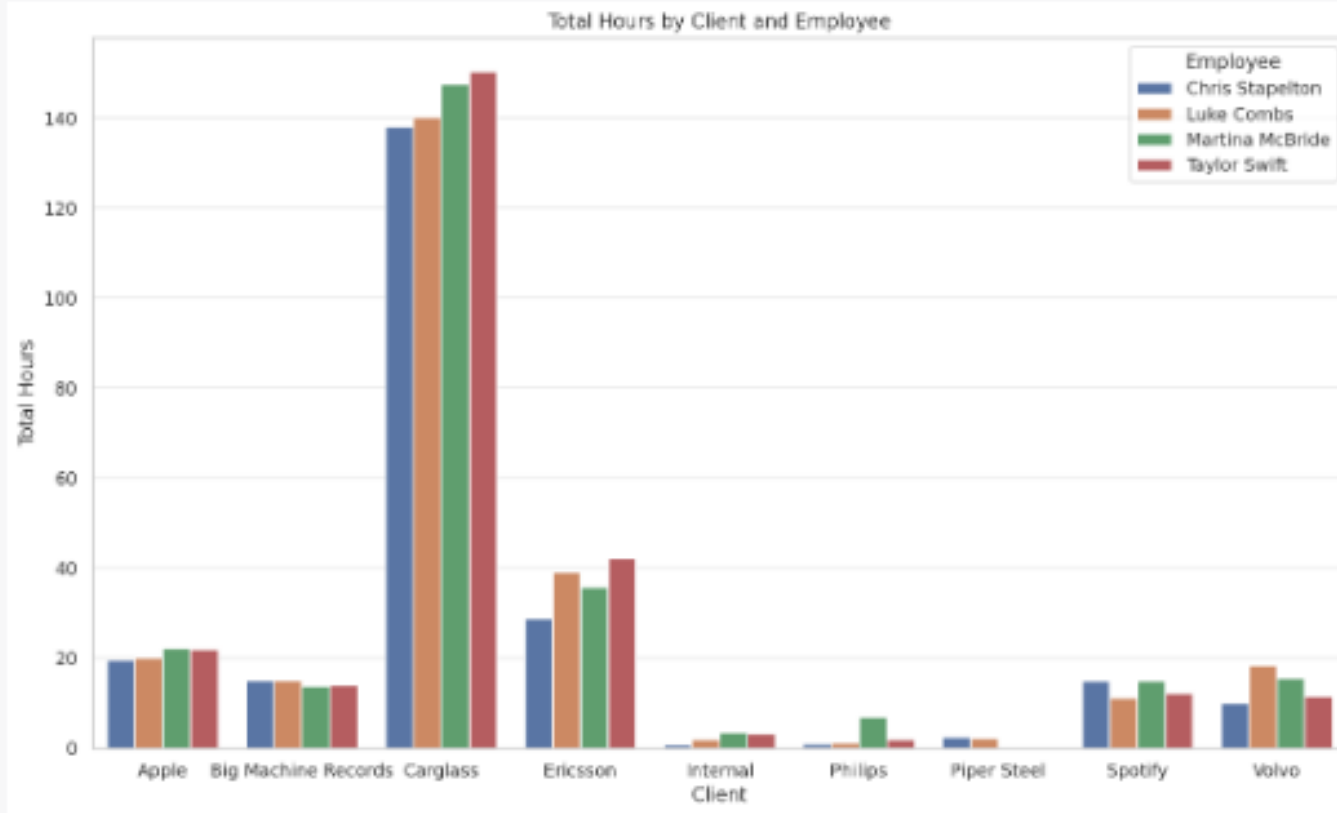


Can you provide this info as a stacked bar chart?



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 >

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:

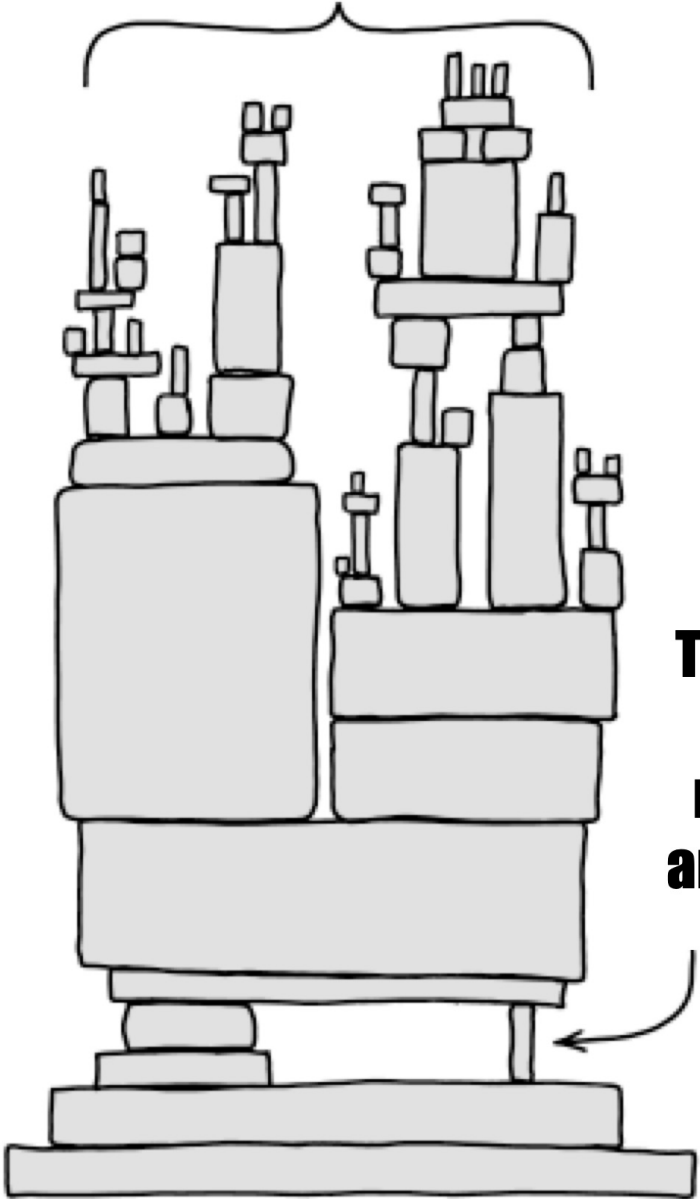


Select or drag and drop a PDF to query (40MB max)

Add to database

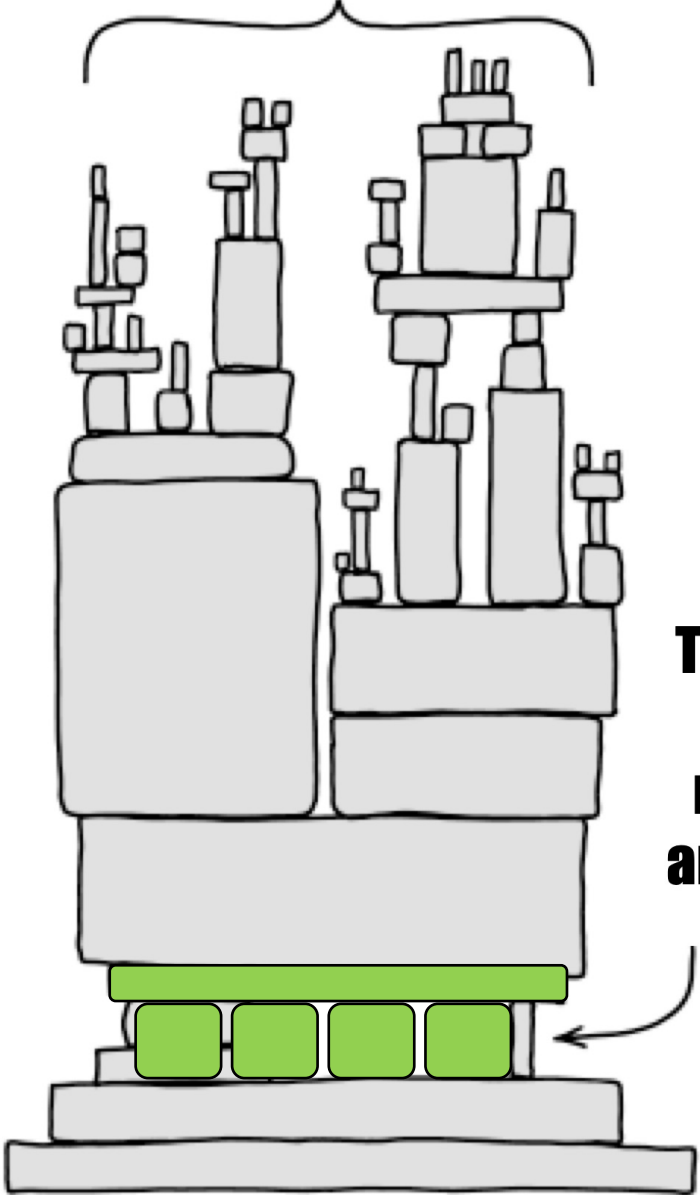
Show documents in database

Most innovative and cool AI products

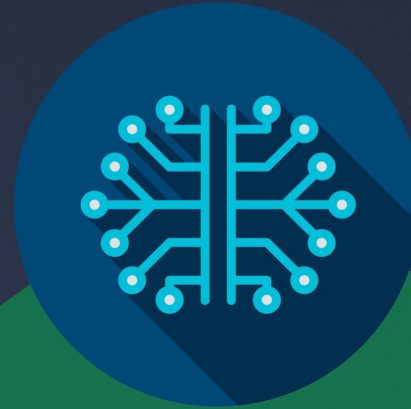


The quality of your firm's master data and meta data

Most innovative and cool AI products



The quality of your firm's master data and meta data



Client Data

Time Capture

Knowledge

Financial

Seamless & Compliant Business Intake. **psa**

for large law firms

Integration to all relevant data services

Seamless integration to eID and eSigning

Client and Matter automatically created in ERP

Signed documents automatically uploaded to DMS

Workspaces automatically created in DMS

Seamless integration between ERP and Time Capture



Client Onboarding



ERP for Law Firms

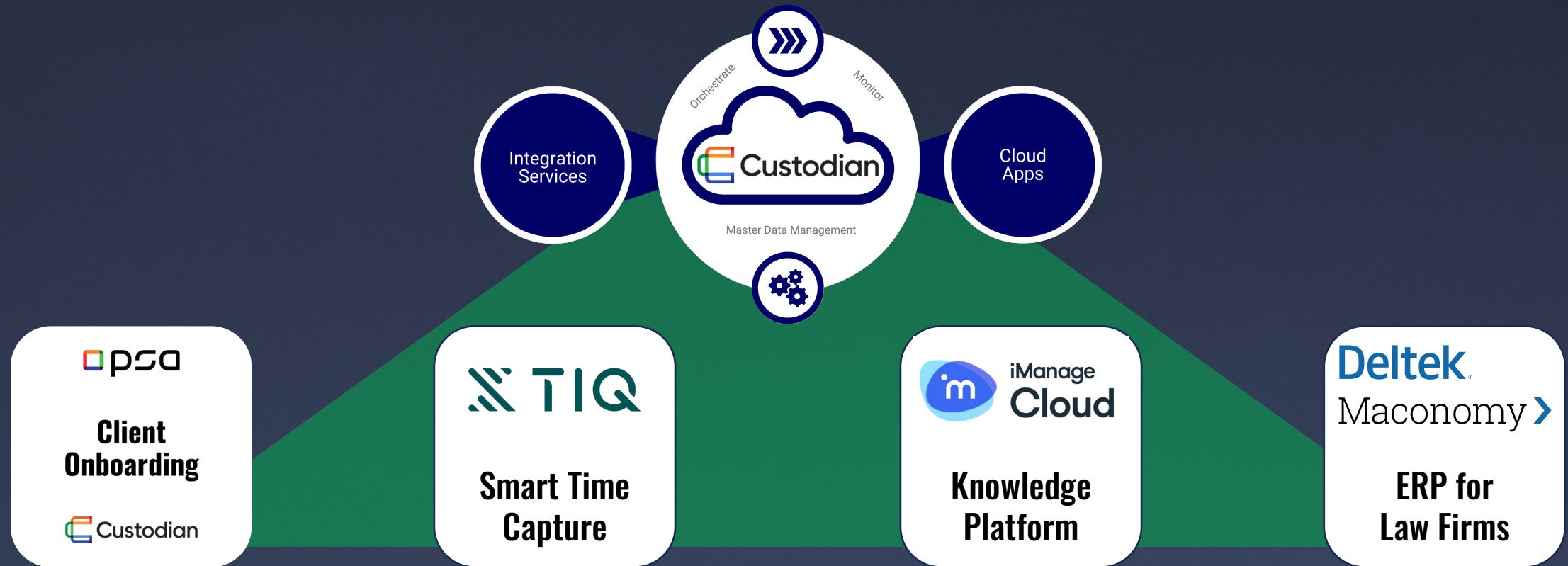


Knowledge Platform



Smart Time Capture





Composable All-in-one Solution

Custodian Client Onboarding



A digital and connected solution streamlining the entire client and matter intake process.

Client & Matter information

Client & Matter information Client assessment Approval Case control review Client Input Form Documentation Review client input

Client

Client Status Client no.
New 69235

Search text Search Business type *
tivoli Company

Enter search text: Client name, Company ID or Client no.

Client name * Company id *
Thomas Tivoli AS 983502822

Attention

Invoicing address *
Magnus Hamlanders veg 5

Zip code City Country *
2406 ELVERUM Norge

INTEGRATED
Smart Automation

»»» DMS
ERP

WORKFLOWS
Complete Control

CONNECTED
Third Party Data Services

SEAMLESS
Client Interaction

Matter Parties

Ultimate Beneficial Owners (UBOs)

PEP/Sanction Lists

Credit Ratings

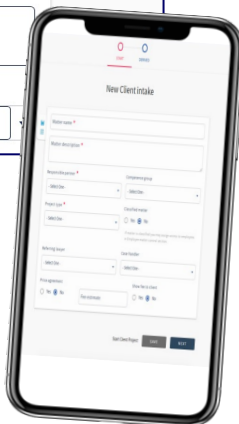
Conflicts Search

Risk Management

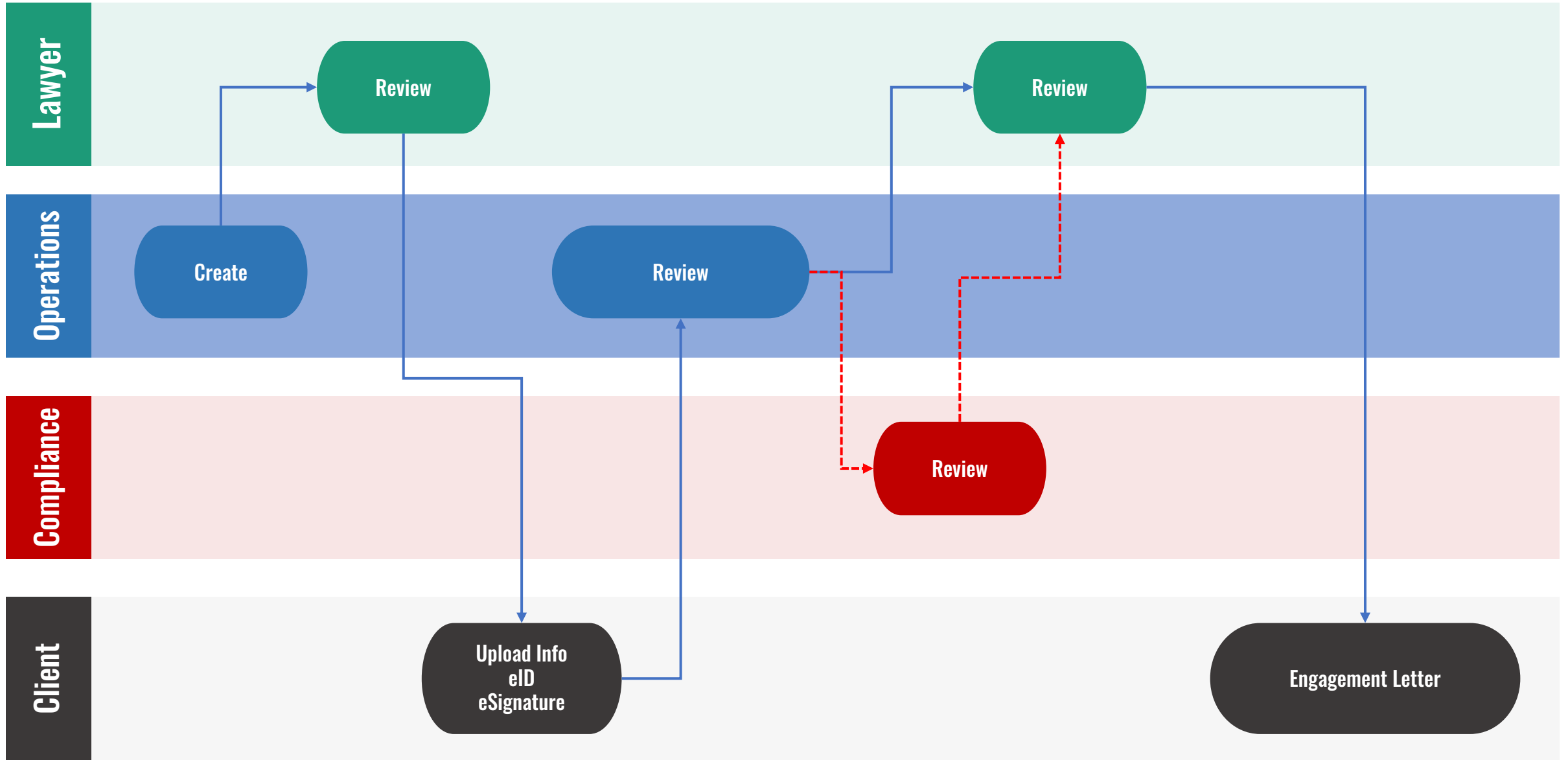
Reporting and Compliance

- ROSCHIER
- WIKBORG | REIN
- CEDERQUIST
- BAHR
- SCHJØDT
- CMS Kluge
- simonsen vogtweig
- BULL
- Haavind
- BING
- HODNELAND
- Selmer
- Harris
- FØYEN
- ARNTZEN DE BESCHE
- CLP
- ADVOKATFIRMAET ELDEN

- dun & bradstreet
- Deltek
- Signicat
- Enin
- ENTITY INSIGHTS
- Microsoft 365
- DocuSign
- Bisnode
- xledger
- bankID
- BUREAU VAN DIJK
- iManage
- BankID



Role-based workflows



Rediger

Actions

Start

Klient og konfliktstatus

Godkjenning

Case control gjennomgang

Informasjon

Dokumentasjon

Gjennomgang klient input

Actions

Preview

Klient

Klientstatus

Klientnr.

Oppdatering/ending

10000156

Søketekst

Tutulia

Søk

Konfliktsøk

Skriv inn søketekst: Klientnavn, organisasjonsnr eller klientnr

Klientnavn *

Tutulia AS

Org.nr. *

914919894

Klienttype *

Firma

Klientadresse *

Sandefjordgata 4M

Postnummer

0464

Poststed

OSLO

Land *

Norway

Klientansvarlig *

Håvard Solberg

Håvard Solberg

Bransjekode (NACE) *

M1 - Professional, Scientific and Technical Activities excl. Legal, acc...

Faktura og priser

Standard fakturautsending *

MVA

Smart Legal Tech | TIQ Time.



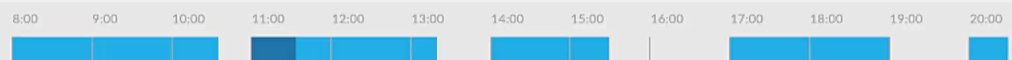
switch to grouped

total suggested: 10h 56m

Track your time

group by category

total confirmed: 10h 40m / 8h 0m




Timers (34m)

33m 58s 2017102 Internal / administration

Timeline

📅	2h 30m	Legal strategy 18 - 19 plan paul@abv.com
📅	1h 36m	2015032 Pitch KPN.doc
📅	2h 20m	2015101 Forecast.xlsx
📅	1h 30m	Weekly kick-off desmond@tiqtime.com; tjerker@tiqtime.com
📅	2h 0m	Dinner with Stefan
📅	30m	Travel
📅	30m	Call Ivo

hours : minutes matter task

description 

▶ Start timer Clear Save

Confirmed entries - 2017003 Carglass BV / General advice (7h 12m)

📅	2h 43m	2017003 Carglass BV / General advice	Meeting Herman and Inga
📅	2h 1m	2017003 Carglass BV / General advice	Meeting with ABV (on-site)
📅	2h 28m	2017003 Carglass BV / General advice	Compose document 'Presentation for KPP'

Confirmed entries - 2017102 Internal / administration (3h 28m)

📅	1h 50m	2017102 Internal / administration	Team afternoon meeting
📅	1h 38m	2017102 Internal / administration	Reviewing document 'Pipeline Q2'

Core Platform | Maconomy.



Deltek Maconomy > Dashboard: Job Portfolio

Job Portfolio Dashboard

Company: PSA Sweden AB | Department: Solutions | Job Manager: Sean Williams

SEK7,333,999.36

Revenue Recognized

SEK3,073,553.88

Cost Registered

SEK4,260,445.48

Margin

58%

Margin %

994

Planned Overrun (Hours)

Job Overrun (Hours)

Profitability

Invoiced

Job No.	Job Name	Job Group	Job Manager	Customer	Revenue Recognized	Cost Registered	Margin	Margin %	Baseline Hours	Actual Hours	EAC Hours	Baseline Cost	Working Budget Cost	Overrun
1020005	Lindab: Expert Services	Time & Material	Sean Williams	Lindab AB	2,523,232.26	862,032.26	1,661,200.00	65.84	1,255.00	1,684.00	1,250.00	913,000.00	773,228.86	139,771.14
1020007	Volvo: Green trucking 2030	Time & Material	Sean Williams	Volvo AB	1,625,160.54	535,960.54	1,089,200.00	67.02	629.00	1,015.00	629.00	520,500.00	520,500.00	0.00
1020009	KPMG: SFDC roll-out Sweden	Time & Material	Sean Williams	KPMG	473,881.14	160,081.14	313,800.00	66.22	440.00	303.00	440.00	321,500.00	321,500.00	0.00
1020011	Södertörns Högskola: Hypergene HEI solution implementation	Fixed Price	Sean Williams	Södertörns Högskola	488,500.00	149,200.00	339,300.00	69.46	934.00	297.00	934.00	673,900.00	648,000.46	25,899.54
1020012	Volvo: iManage Cloud migration	Time & Material	Sean Williams	Volvo AB	237,375.42	89,204.94	148,170.48	62.42	1,560.00	165.00	1,560.00	1,179,000.00	1,189,000.00	-10,000.00
1020012-01	Volvo: iManage Cloud CR-001 - Insight+	Time & Material	Sean Williams	Volvo AB	216,600.00	194,940.00	21,660.00	10.00	440.00	207.00	440.00	314,000.00	314,000.00	0.00
1020016	Lindab: Microsoft Fabric implementation	Time & Material	Sean Williams	Lindab AB	29,400.00	10,500.00	18,900.00	64.29	0.00	21.00	0.00	0.00	0.00	0.00
1020021	Capio: Solution Implementation	Fixed Price	Sean Williams	Capio Sverige AB	1,444,600.00	908,380.00	536,220.00	37.12	3,200.00	1,720.00	2,890.00	2,360,000.00	1,493,383.82	866,616.18
1020021-01	Capio: CR-001 Change Management Support	Time & Material	Sean Williams	Capio Sverige AB	235,250.00	143,255.00	91,995.00	39.11	920.00	215.00	0.00	662,000.00	0.00	662,000.00
1020022	WO-0123 Capio	Time & Material	Sean Williams	Capio Sverige AB	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1020023	Region Skåne: 2nd wave	Time & Material	Sean Williams	Region Skåne	60,000.00	20,000.00	40,000.00	66.67	0.00	5.00	0.00	0.00	0.00	0.00
1020025	Mudado TEST	Time & Material	Sean Williams	Scania AB	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1020026	Mudado TEST V1	Time & Material	Sean Williams	Scania AB	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1020027	Mudado TEST V1 nr 2	Time & Material	Sean Williams	Scania AB	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1020028	Mudado TEST V1 nr 2	Time & Material	Sean Williams	Scania AB	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total					7,333,999.36	3,073,553.88	4,260,445.48	58.09	9,378.00	5,632.00	8,143.00	6,943,900.00	5,259,613.14	1,684,286.86

25 items per page



Job Dashboard

My Open Jobs Search for Jobs

Lindab: Expert Services 1020005

Lindab AB 10000

Invoicing Method
Time and Material

Currency
SEK

SEK2,523,232.26

Revenue Recognized

SEK2,159,232.26

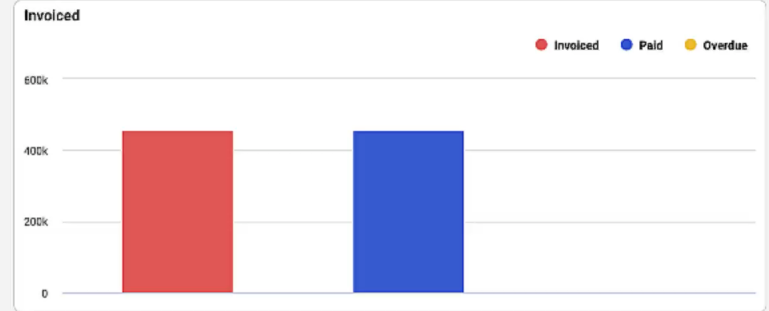
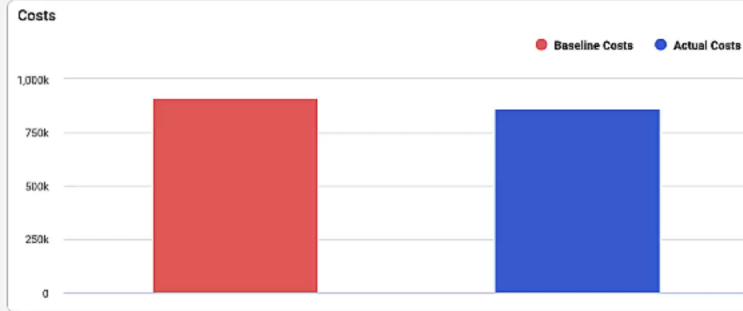
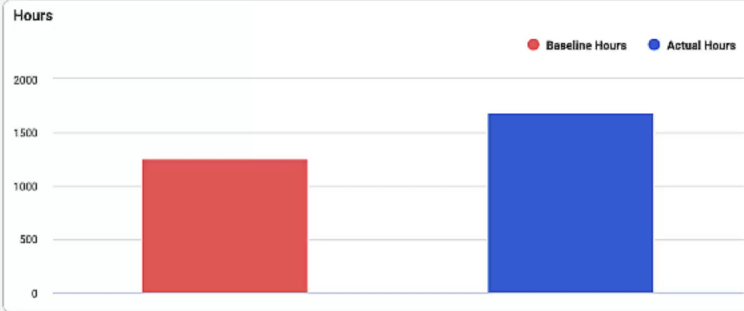
Unbilled WIP

66%

Margin %

SEK455,000.00

Invoiced



	WIP	Revenue Recognized	Costs	Margin	Margin %
Hours		2,503,200.00	842,000.00		
External Costs		20,032.26	20,032.26		
Expenses		0.00	0.00		
Total	2,159,232.26	2,523,232.26	862,032.26	1,661,200.00	65.84

Core Platform | iManage Cloud.



iManage

- ✓ Matter Management
- ✓ Document Management
- ✓ E-mail Management
- ✓ Knowledge Management
- ✓ Task Management
- ✓ Standard Connectors

19 of 20 top law firms in Norway use iManage

Now available from 5 users

Composable Platform

	All	Unread			By Date	
	From	Subject	Received	Filing St...		
	noreply@ajubalaw...	Access request for 1017.001 - Jeanne Seeley Employment Agreement	Tue 15/09/2020 13:54			
	Andrea Case	Relationship between duty of care and human rights [IWOV-VW.FID1966]	Tue 15/09/2020 13:42			
	Ed White	PLC Dispute Resolution weekly e-mail to 14 November 2018 [IWOV-Active.FID8156]	Tue 15/09/2020 13:42	Filed		
	Andrea Case	OFT publishes reference decision in Hospedia/Premier Telesolutions merger	Tue 15/09/2020 13:42	Filed		
	Charlotte.Jones.la...	John Thornly - Settlement Agreement	Tue 15/09/2020 13:42			
	Ed White	Inheritance tax agricultural property relief: the farmhouse [IWOV-Active.FID8156]	Tue 15/09/2020 13:42	Filed		
	Ed White	Commission announces that all mobile operators have now informed it of their new Eurotariffs under the Roaming Regulation [IWOV-A...	Tue 15/09/2020 13:42			
	Ed White	Draft legislation on residence and domicile published [IWOV-Active.FID8156]	Tue 15/09/2020 13:41			
	Ed White	Virtual Team Drinks	Tue 15/09/2020 13:39			
	John Barken	Agreement for Justin Harnet	Tue 15/09/2020 13:34			
	Jane Lipton	Re: Yahoo Finance - Justin Harnet - Employment Agreement(584061.3).docx	Tue 15/09/2020 13:33			
	Ed White	Response to SEC Comments: Registered Offerings [IWOV-Active.FID8156]	Tue 15/09/2020 13:00			
	Ed White	Employment Team Weekly Catch up	Mon 14/09/2020 21:51			
	Ed White	Ofcom publishes terms of reference for review of public service television broadcasting [IWOV-KMInsight.FID1503]	Mon 14/09/2020 15:35	Filed		
	Andrea Case	Customer issues when structuring an outsourcing project: a comparative study [IWOV-Active.FID12185]	Mon 14/09/2020 15:34	Filed		

Commission announces that all mobile operators have now informed it of their new Eurotariffs under the Roaming Regulati...

EW Ed White <ewhite@ajubalaw.co.uk>
To: Drake Ohlson
Tue 15/09/2020 13:42

Hi Ed,

On 23 August 2007, the European Commission announced that it has now been informed by all mobile operators of the Eurotariffs that they are required to offer under Regulation 717/2007 on roaming on public mobile telephone networks within the Community (the Roaming Regulation) (Commission press release IP/07/1247). The operators were required to offer the Eurotariffs (tariffs no higher than EURO.49 per minute for calls made abroad and no higher than EURO.24 for calls received abroad, excluding VAT) by 31 July 2007 (see Legal update, Roaming Regulation published in Official Journal). The tariffs are listed on a Commission website, launched on 2 August 2007 (see Legal update, Commission reports on implementation of Roaming Regulation). The Commission welcomes the fact that in 23 of the 27 member states, there is at least one operator offering roaming tariffs below the ceilings set by the Roaming Regulation. Most mobile operators have also offered or activated a Eurotariff before the Regulation's deadlines. In October 2007, the Commission, with the European Regulators Group, will make a more detailed and qualitative assessment of the transition to the Eurotariff. The Commission must report by 30 December 2008 to the European Parliament and to the EU Council of Ministers on the functioning of the Roaming Regulation and on whether it should be extended.

EC updatesLegal update: archivePLC Competition Law - ECEuropean UnionRegulatory: communicationsSpecial sectors and utilities

Thanks,

Work Panel

Title: Search the names of Matters within Active

Browse Folders Matters Documents My Favourites Emails Clients

RECENT MATTERS MY MATTERS

My Matters
Drake Ohlson | DOHLSON -
Last Updated 2:37 PM

13 Items Sort by: Default

- 1001 - 5699 Bea Watts Employment Agreement
- 1001 - 5863 James Felton Employment Agreement
- 1017.001 - Apple Inc - Jeanne Seeley Employment Agreement
- 1126.002 - Clark, Andrew v. Jane Doe
- 1184.0018 John Thornly - Settlement Agreement
- 1850 - 0001 - Yahoo Finance
- 1850.0023 - Yahoo Finance - Justin Harnet
- 2094.001 - Dyson
- 9999 - 0026 - Employment Team
- Drake Ohlson - HR Workspace
- Drake Ohlson - Personal Closed Workspace
- Drake Ohlson - Personal Open Workspace

The Custodian Platform.





Q&A

Legal **ONE**

12:00 Rom 2



Custodian **AI+**

13:15 Rom 2



Kiitos

Grazie

Bedankt

Gracias

Obrigado

Danke

Takk

Thank You.

Tak

Tack

Dzięk

Merci

Aitäh

Paldies

Dėkoju



psaconsulting.com

custodian.no