



# Carpe Diem

Advanced time capture



PUT TIME ON YOUR SIDE

# In a fast changing landscape, Carpe Diem delivers what firms need from a time recording platform

Carpe Diem is a market-leading time recording solution. It was designed to capture every revenue event, maximize billable time and improve realization rates - all of which have a positive impact on your firm's profitability.

This open, extendable platform provides a very powerful set of time recording features. Each function has been specifically created to remove any barriers to easy, efficient time capture in order to help your firm succeed.

## Instantaneous timekeeping

Carpe Diem ensures that time is consistently captured by providing users with the option to capture time the instant it is worked, regardless of which device they have access to.

- > Capture time whenever a user moves to a new task with our SmarTimer toolbar that sits alongside your applications
- > Running timers follow users when they move devices
- > As an extendable platform our APIs allow easy integration with other systems to future proof your investment and maximize functionality

## Reconstructed timekeeping

It's easy for busy timekeepers, who are moving between matters or trying to do several things at once, to neglect to capture all of their time. Having to retrospectively review the time spent on matters to find missing minutes can be a difficult, time consuming and frustrating exercise. Carpe Diem can help.

Our TimeFinder functionality automatically suggests time entries that may have been missed. Users can auto-populate timesheets based on their digital footprint, or find missing time quickly and easily by responding to intelligent prompts.

## Predictive assistance and glossary

Predictive assistance auto-completes data and provides in-line spell checks, so the process of entering information is quick and easy.

The glossary feature saves additional time by allowing the attachment of shorthand terms for regularly used words or phrases. Instead of retyping, users simply enter the shorthand and the field will be populated correctly.

## Mobile timekeeping

Accessible from both Apple and Android devices, the Carpe Diem native app offers comprehensive, yet easy-to-use, mobile functionality. Users can securely record time from any location, on or off-line.

The app provides three key metrics that allow users to check their current time capture against time-keeping performance targets. This drives engagement, and higher rates of capture, by encouraging them to return to the app regularly to measure their progress.

## Accessible timekeeping

User adoption of legal technology has often been a challenge for firms. With the rapid adoption of consumer-based technologies moving into the legal application arena, law firm users expect to use legal business applications that work the way other web applications do.

*"We have achieved 100% user adoption due in large part to the various time recording options available as well as the flexibility of the Carpe Diem mobile app and the comprehensiveness of the TimeFinder technology. In addition, we supported the roll out with a very well planned and executed training program based on the 'train the trainer' model. In combination, all of this has helped achieve our 100% adoption target."*

Jon Wyche >  
IT Director >  
Meunier Carlin & Curfman  
LLC >



Web Content Accessibility Guidelines (WCAG) were developed in cooperation with individuals and organisations around the world, with the goal of providing a single shared standard to help make web content accessible to people with disabilities.

Carpe Diem is built to WCAG 2.0 standard, to allow all users, across all levels of experience and ability, to use it with confidence.

# Billing transparency and compliance builds trust ... and your business

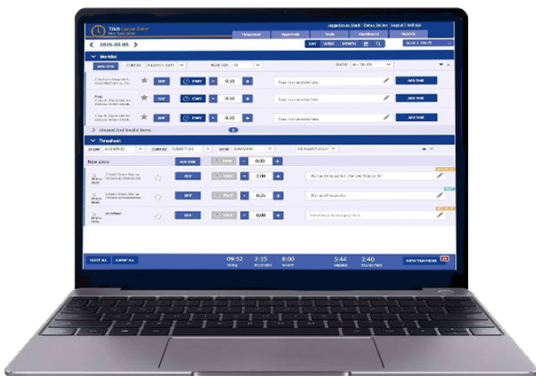


Every firm knows that building client trust and loyalty is the foundation of long-term success. While comprehensive time capture is crucial for correct billing and client satisfaction, it's also important that firms maximize capture while enforcing compliance.

## Transparent billing

Historic time data is integral to the setting of realistic fees and steering firms away from the risks of under-or-over estimations when quoting for fixed fee work. Clients who are told in advance how their matter will be billed, and who receive detailed, timely, accurate invoices, within the lifespan of a matter or detailed budgets, are much more likely to have realistic expectations and confidence that charges are fair.

When billing is performed correctly, all invoice queries can be answered quickly and openly. Ultimately, this allows the billing process to be an important factor in the building of trust and strong client relationships.



## Compliance with Outside Counsel Guidelines

It's vital to avoid costly write downs from non-compliance to client billing rules, but managing the multiple rules contained within Outside Counsel Guidelines (OCG) can be a real challenge.

By allowing unhindered capture of the revenue event, and then applying compliance to the entry before submission, Carpe Diem provides the benefits of quick capture and compliance.

- > As a web application, entire OCG policies (regardless of where they are hosted), can be referenced in Carpe Diem's time entry form and relevant OCG information made available to users
- > Carpe Diem integrates with billing platforms smoothly, ensuring time data is tracked across its entire journey with no disruption to other core processes or systems
- > Users can easily validate each time entry against their client's guidelines to save time and ensure compliance
- > Provides the flexibility to adhere to Alternative Fee Arrangements (AFAs)
- > Automated warnings can be triggered if a specific client's Outside Council Guidelines or billing rules are being breached at the point when time is being logged
- > Information pop-ups provide guidance on compliance rules at the moment of input
- > Third party validation can validate against bill rules or budgets during the Carpe Diem 'save' or 'submit' process, regardless of where the rules are hosted





# Time data can deliver new opportunities

## Resource management fuels growth

By providing accurate time data for each matter, Carpe Diem acts as a valuable business management tool. To seize opportunities, you have to understand the true cost of a matter, know which ones you should take on, and how much you should charge. But that's not always easy.

In a fast-changing legal landscape, success means meeting client expectations. One of the critical elements of this is clearly demonstrating the cost effectiveness of your services and this has fuelled the growth of new alternative fee arrangements (AFA).

Carpe Diem provides the flexibility that your firm needs to easily adhere to AFAs. It allows you to build your own rules so you can manage, and control, price strategies such as blended hourly rates, fee caps, hourly rate volume discounts and fixed fees or matter based rates.

- > Break down the balance of partners and associates who worked on a matter to identify the blend of skills that can best optimize the costing of future matters
- > Know how much time matter completion takes for more accurate work scheduling

## Reporting

Carpe Diem's powerful, customizable metrics and dashboards provide actionable management data that can improve compliance, reduce risk and increase cash flow - all at the press of a single button. Faster payment is the result of a reduced billing cycle and an improved realization rate.

## Forecasting and workload management

Balancing workload, and efficiently allocating resources across the firm, helps you make the best use of the talent you have and ensures maximum profitability.

Carpe Diem provides insight into the relevant resource availability required to fulfil new matters, at the right price and within required timelines.

- > Managing workloads is simplified with comprehensive dashboards that review work allocation and resource availability by individual, practice group or office.
- > Insight into work patterns, areas of low usage or areas under stress from too much work
- > Develop tactical business development initiatives to drive work to any underutilized practice areas
- > Allows dynamic reallocation of work to those with spare capacity



## Why Carpe Diem?

It's been a market-leading timekeeping solution for more than 20 years and since the launch of our 'next generation' web application, innovation and adoption have accelerated at record pace.

- Developed on a platform that offers law firms the very latest technologies
- An intuitive interface that is consistent across all devices to reduce training and to increase user acceptance
- Scalable solution easily grows in line with firm's requirements
- Our Azure Cloud option offers 99.5% uptime
- Integrates with, and complements, other industry-leading applications, including NetDocuments and e-BillingHub
- To keep your data secure, Carpe Diem complies with the highest international security standards
- Delivers faster payments by shortening the bill-to-payment cycle



## Extensibility allows smooth integration with leading applications

Carpe Diem is an extensible platform with a comprehensive suite of APIs to allow seamless integration with your firm's existing software. This ensures that time data can be tracked across its entire journey without causing any disruption at all to your core systems and processes.

Trying to integrate older, non-extensible time applications often causes unforeseen problems and expense. But with an innovative, reliable and consistent platform like Carpe Diem, little resource is required to implement or maintain integrations. The possibilities are endless.

For instance, a time recording system, in communication with the firm's **practice management system**, could enable a lawyer to surface data about a client matter, about billing, compliance, budgets or alternative fee arrangements – whatever will be useful, and whenever it's needed.

Combined with your **accounting solution** (for example Thomson Reuters eBillingHub), the billing process is significantly simplified:

- > Shorten the bill-to-payment cycle and increase billing compliance
- > Boost efficiency with easy time entry, validation and submittal for timekeepers
- > Reduce billing errors with time validation before submission
- > Free up time for finance staff during the prebill phase with 'first-time correct' entries

When in sync with **document solutions** your ability to find hidden billable minutes that are often difficult to identify is maximized.

- > Hosting Carpe Diem within NetDocuments allows the capture of time worked on emails or documents, without any requirement to switch applications
- > By ensuring all time worked on every document is captured, firms are easily able to provide greater visibility and accuracy of time spent to clients

## Save time with process automation

Timekeeping has a big impact on a firm's revenue. Clearly the more time that can be logged the more money you earn. Conversely, the more time spent collecting time, the more money you notionally lose. It therefore makes sense to automate how time is collected and fed through to the billing system as much as possible.

The impact of any small gain you make is multiplied by the number of times you do that task, and when you factor in the added value you can realize from having some of your team redeployed on higher value work, you could find that small inroads into enhancing efficiency and increasing productivity begin to accumulate into quite significant impacts.

### Reports

Carpe Diem Task Centre gives you the power to automate and schedule reports on an individual, or firm-wide, timekeeping performance. Published to key stakeholders, these reports provide unprecedented transparency. Task Centre can also go further by enabling your

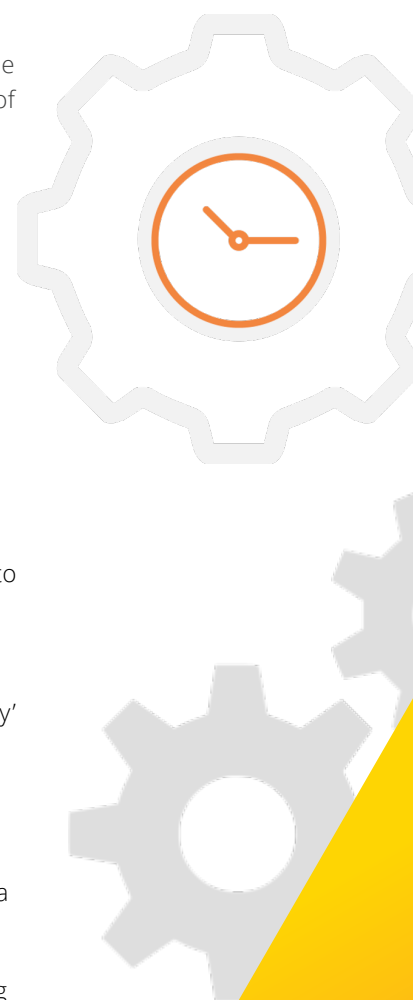
users to take corrective action on their time keeping where necessary.

### Notifications and alerts

Missing, unclosed or unsubmitted time is literally lost revenue that is going unbilled. Use Task Centre to schedule and run regular notifications via email or SMS to timekeepers to alert them to complete and submit their time entries efficiently. Full integration with Carpe Diem, via our fully exposed API, can automate tasks to submit outstanding records in a 'ready' status meaning potential revenue is not left hanging in the system.

### Data integration and synchronization

Moving information from a current system to a new system can be costly and take time. With Task Centre you don't have to. It's simple drag and drop tool does all the work for you making integrating and synchronizing data from current systems easy and quick and thus reducing costs to the business. This innovative functionality allows you to create a seamless end-to-end time recording and billing process.



## Delivered your way



Carpe Diem won't back you into a corner. We provide flexibility in allowing you to choose the implementation path that works best for your firm. This means Carpe Diem remains accessible for all types of firms or teams, regardless of size and number of users.

- > Completely customizable to meet your firms' requirements
- > Fully project managed implementation if that is what you would prefer
- > Multiple user training options which can be either on premise, remote or train the trainer
- > Includes easy software on-boarding, continued training and accredited help desk support

### Cloud hosting

It used to be the case that sophisticated legal technology was the preserve of big law because it was expensive to commission and implement. The Cloud, however, has significantly changed the model and therefore the cost of accessing top technology.

The Cloud enables users to simply login and start using the software wherever they are, from any internet enabled device or location. Firms no longer have to provision servers, load software, train employees and make big up-front payments every time they invest in a new application. The on-boarding costs are slashed.

There's no capital expenditure (CAPEX), only operational expenditure (OPEX) and it's highly scalable. It also used to be the case that sophisticated technology needed sophisticated (and expensive) in-house IT expertise. That no longer applies as you can pay a per-user subscription fee to access an intuitive service that sits in the Cloud. Another advantage of Cloud services is that they are designed to integrate with existing systems and each other.

This enables firms to 'pick and mix' the blend of Cloud-based applications that best meet their needs, without worrying about the traditional constraints of integrating legacy systems with new ones.

Carpe Diem is hosted in Azure to ensure robust security and global availability. You can be confident that safeguards to protect your data, and meet regulatory compliance requirements, underpin this network architecture, delivering complete peace of mind.

### Your data remains secure

As the only legal timekeeping solution approved for inclusion in the UK Government's G-Cloud 11 digital marketplace, you are assured we always take your data security very seriously.

- > Transparent data encryption of all databases, backups and transaction logs
- > HSTS (HTTP strict transport security) enforced
- > Users are authenticated against the firm's Azure Active Directory
- > Databases fully backed up every 12 hours with 35-day retention of backups

### On-premises installation

Firms who have already made a substantial investment in their own IT teams and infrastructure may not be ready to move to the Cloud. Installing Carpe Diem on your local servers means you can customize the application to meet your exact specifications.

- > Keep critical data and information in-house with no 3rd party access available
- > No requirement for an internet connection to access the data online or offline
- > On-going service in instances of internet disruption
- > Total control of backup data and data recovery

# User training, consultancy and on-going support

## Training

Training end-users and timekeepers to know, love and get the most out of your new software is the final piece in the jigsaw of a successful project, and arguably, the most important.

It provides staff with the knowledge and confidence to resolve their own problems, reduces downtime and preserves compliance with your firm's policies.

Our Training Team work with both new and existing clients, helping them meet all of their objectives.

- > Quick start or fully customizable options to meet your specific requirements
- > Full project managed implementation, if preferred
- > Imbedded tutorials and 'how to' guides get users quickly up-to-speed with new features and functionalities, ensuring they get maximum benefit immediately

## Support

It's simple. We want to provide the best support service to the legal industry. Our experienced support team is made up of friendly and knowledgeable people who efficiently manage any issues and provide help to all users.

Your firm can also benefit from an active group of Carpe Diem users. We regularly meet with them to provide information about new enhancements to our timekeeping software.

User Voice is our ideas portal. It's a collaborative space for users to suggest, discuss and vote on product enhancements

- > We provide support for both on-premise and Cloud implementations
- > Choose from a broad range of support services to address the needs of your users and your business

All support responses and resolutions are conducted within the standard of our Service Level Agreements.



*"This was one of the smoothest and easiest projects I ever managed. A big thank you goes to the Carpe Diem team of professionals. Everything went extremely well, from project scoping and planning, to project communication and knowledge transfer from Advanced's experts to ours. And of course, it is a very high-quality software application."*

Dr Doville > IT Business & Project Manager >



## About Advanced

Advanced has over 30 years' experience in technical systems development. We provide software solutions to more than 5,000 law firms, in-house counsel and barristers' chambers, and more than 50,000 users.

Our legal clients depend on our solutions to support their business aims and processes every day. Our legal-centric software includes integrated chambers and case management systems, process workflows, time recording, Cloud forms, Cloud dictation, document management and digital document bundle production.

Many of our customers also rely on our business solutions to manage their core business processes such as HR, payroll, finance, spend management, e-marketing and IT services.

Our goal is to enable our customers to drive efficiencies, savings and growth opportunities. We do this by providing right-first-time software solutions that evolve with the changing needs of their business and the environment they operate in.

**When it comes to legal – we're in your corner.**

## More information

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