Passport® Data Warehouse empowers clients to improve business outcomes with advanced reporting capabilities. This business intelligence solution uses IBM Cognos and data modeling technologies to bring together disparate sources of data. Passport clients can enhance decision-making and gain actionable insights about their legal spend management, matters, claims, and legal risks. Data Warehouse also allows clients to receive automated exports of their Passport data for use in other third-party business reporting tools. The Passport Data Warehouse provides the extra capability to connect directly to the in-house reporting tools and securely exports information from the Passport ecosystem to local sources or an FTP path. This data pulls into our clients’ internal reporting ecosystems, such as a cross-application data warehouse or data lake, for simple and consolidated reporting and analytics.

Building and modifying reports and queries to meet urgent or emerging business needs is easy with Passport Data Warehouse and Reporting. The data model mirrors the location of data within the user interface of Passport applications, making it easy and intuitive to find data. Clients can choose to add on access to IBM Cognos Workspace and Workspace Advanced. Passport Data Warehouse and Reporting includes the IBM® Cognos® Report Editor, which provides access to a range of reporting and analytics capabilities, from quick ad hoc queries to the development of sophisticated custom reports with complex prompts and filters. With the Passport Data Warehouse, the client also has the option to use other business intelligence platforms for reporting and analysis needs.

Key Benefits
- Improve visibility and gain actionable insights
- Optimize report performance
- Easily consolidate data
- Reduce the cost and complexity of reporting
- Rapidly support emerging business intelligence and reporting needs
Passport® Data Warehouse and Reporting

Improve Visibility and Reduce the Cost and Complexity of Reporting

Passport Reporting helps clients avoid user frustration and fire drills by providing support for high-speed analysis of data across the enterprise, which empowers more strategic department management. Passport Data Warehouse and Reporting offers a centralized repository and a single toolset for creating reports that bring together data from the client's holistic Passport ecosystem. The reporting ecosystem includes all data from all applications and modules built for Passport, as well as electronic sources of industry or market-related data that integrates with the platform. The result is improved transparency for the business and simplified reporting for administration and support.

Passport Data Warehouse Report Packages

The Data Warehouse includes a standard package of reports and licenses based on your Passport package to meet your business needs. This standard reporting pack allows you to get actionable insights about individual timekeepers, matter status, invoice payments, matter-level spend, invoice-level spend, and much more.

Library of Report Packs

ELM Solutions understands the value of a reporting and analytics solution that keeps pace with a business's changing needs. Passport Data Warehouse and Reporting offers tools that make it efficient to manage and maintain data, as well as update and write new reports and queries, all without the need for a vendor services engagement. The user-friendly user interface and tools provided by Passport enable the addition of new custom fields, objects, and data sources by in-house resources, and all custom fields automatically update to the data model and are reportable. ELM Solutions has developed a library of report packs that displays common categories for legal operations. These reports allow users to view any information and activities related to matters and spend.

1. **Standard Reports** - displays status of invoice payments, matter and spend statuses filtered by type, organization, and person.
2. **Matter Management Reports** - shows the lifecycle of a matter, including average days the case is open and assigned.
3. **Phase/Task Reports** - shows activity and expense metrics filtered by phase, tasks, blended rates, and category.
4. **Spend/Invoice Reports** - displays the total amount for fees, hours/units, expenses, discounts, submitted adjustments, adjustments, taxes, and net amount. Invoices that are external or in Error Manager do not appear in this report.
5. **Actionable Insight Reports: Billing Practices** - allows you to track activity, invoice status, and billing productivity of timekeepers.
6. **Budget Reports** - displays the fee expense budget for matters in an organization over the life of the matter.
7. **Accruals Collaboration** - shows matter and invoice accrual information of the law firms broken by multiple key data points.
8. **Timekeeper Collaboration** - displays the number of matters for each timekeeper by rank and name.
9. **Alternative Fee Arrangements (AFA)** - allows business managers to see the savings of AFAs over a period of time. This report can be used by business managers during periodic evaluations to assess the effects of AFAs.
10. **Diversity** - provides client users easy-to-read diversity, spend, and performance information for an external law firm organization on a single page.
11. **Cognos Audit** - allows you to review and track user activity on the system. Users assigned to the consumer role cannot access the report pack. Permissions can be further restricted by the client.
12. **Passport Audit** - provides summary and detailed information about user activity in the Passport application.
13. **CDC Monitoring** - tracks each run of the Data Synchronization (CDC) job in Data Warehouse, describing objects affected and numbers of rows affected.