

Interesting Features

Dashboard	<p>Home Screen</p> <ul style="list-style-type: none"> • Dashboard summary, portfolio level analytics • Quick navigation to subset of contracts, e.g. with a certain counterparty <p>Data Confidence</p> <ul style="list-style-type: none"> • Additional dashboard shows the confidence level for all concepts • Filter and focus QC time on e.g. "medium confidence" (unmatched) results by concept
Upload Contracts	<p>Ad hoc</p> <ul style="list-style-type: none"> • Drag and Drop contracts or folders via the UI, good for ~1,000 contracts <p>Bulk</p> <ul style="list-style-type: none"> • Support for higher volume e.g. directly to credentialled S3 bucket <p>Rapid Assessment</p> <ul style="list-style-type: none"> • Basic set of data extracted quickly and at low cost to help you find which files or contracts you want to further analyze, does not include AI matching <p>APIs</p> <ul style="list-style-type: none"> • Connect to existing contract repositories to ensure completeness and timeliness of contract analysis
Cleaning & QC	<p>De-duplication</p> <ul style="list-style-type: none"> • Identify exact and near duplicates and analysis tools to rapidly remove unnecessary copies <p>Split</p> <ul style="list-style-type: none"> • Separate out contracts saved into a single PDF/file <p>Linking</p> <ul style="list-style-type: none"> • Recognizes and displays references in one contract to another contract • E.g., original agreements and amendments and parent agreements (e.g., ISDA Master, MSA) with child agreements (such as amendments, SOWs) <p>AI Matching</p> <ul style="list-style-type: none"> • Uses structured, tested prompts to compare results from our deterministic rule-based system with those from a generative AI model assigning confidence levels and highlighting any discrepancies for review <p>QC by concept or doc/portfolio</p> <ul style="list-style-type: none"> • Interrogate/validate/correct all data in Quality Check mode • See lower confidence results (if any) to avoid rekeying/speed QC <p>Transform and Normalize Data</p> <ul style="list-style-type: none"> • Extracted data is transformed into a standard format for some concepts (e.g., Agreement Date, Parties, Payment Terms, Governing Law). Data becomes comparable across multiple contracts
Tags & Custom Content	<p>Tags & Tagging Rules</p> <ul style="list-style-type: none"> • Create Tags to quickly find in future and/or further refine searches • Use Saved Searches to Auto-tag results - any new contracts that are loaded will be searched and auto-tagged when search criteria are met <p>Customize Content</p> <ul style="list-style-type: none"> • Create custom views and custom concepts • Import reference data e.g. LE identifiers and associate them with contracts or concepts found in contracts and include these in custom views <p>Contract Tracker (beta)</p> <ul style="list-style-type: none"> • Generate automatic alerts for e.g. an upcoming contract renewal, via email or within the Catylex application (or both) • Alerts can be offset by a specified number of e.g. days, months, before or after the occurrence of a milestone date <p>RACI Matrix (beta)</p> <ul style="list-style-type: none"> • Assign RACI to concepts or obligations to individuals or groups (RACI = Responsible, Accountable, Consulted, Informed)

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LE Mgt	Home and Away Parties	<ul style="list-style-type: none"> • Delineate between your contracting parties and third parties • Manage alias (DBA, FKA, common typos)
	Reference Data	<ul style="list-style-type: none"> • Incorporate legal entity (including counterparty) reference data e.g. client codes, preferred vendor status, cost center mappings etc.
Search & Analyze	Simple Search	<ul style="list-style-type: none"> • Grid view of all your contracts with simple search/filtering options
	Natural Language Search	<ul style="list-style-type: none"> • Plain English queries - converts the search into structured searches and limits results to data actually found in your contracts
	Advanced Search	<ul style="list-style-type: none"> • Search for contracts that contain or do not contain certain trained concepts and/or keywords and/or combinations of search criteria • Save Searches so they can be used again • Search for sentences that contain or do not contain certain trained concepts and/or keywords or are similar to a selected sentence within varying degrees
	Key Terms	<ul style="list-style-type: none"> • "Key Terms Report" for single contract data • View concepts present/not present in a document • One click to see answer in PDF/context of full contract • For many of the concepts, relevant provision is displayed along with relevant details highlighted • Select a different View of the contract e.g. a data privacy focused view
	All Terms Compare	<ul style="list-style-type: none"> • "All Terms Report" for all contract content
	Visualize	<ul style="list-style-type: none"> • Select contracts and select 'Compare Key Terms' to view data from multiple contracts side by side <ul style="list-style-type: none"> • Use charts and graphs to present Catylex data visually for easier consumption
Share	Export to Excel	<ul style="list-style-type: none"> • 'Share' to export data in Excel for multiple contracts or search results
	Service Accounts & APIs	<ul style="list-style-type: none"> • APIs enable application integration by allowing permitted service accounts to invoke data sharing without interactive authentication
Administration	Role Based Access Control	<ul style="list-style-type: none"> • Manage users access to contracts via workspace • Manage account settings (including default views etc.) • Access user activity logs
	Personalization	<ul style="list-style-type: none"> • Various options to customize your log in experience, saved settings etc.
	Security	<ul style="list-style-type: none"> • SOC 2 Type 2 audited