

Interesting Features

Dashboard	Home Screen	<ul style="list-style-type: none"> • Dashboard summary, portfolio level analytics • Quick navigation to subset of contracts, e.g. with a certain counterparty
	Data Confidence	<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	Ad hoc	<ul style="list-style-type: none"> • Drag and Drop contracts or folders via the UI, good for ~1,000 contracts
	Bulk	<ul style="list-style-type: none"> • Support for higher volume e.g. directly to credentialled S3 bucket
	APIs	<ul style="list-style-type: none"> • Connect to existing contract repositories to ensure completeness and timeliness of contract analysis
	De-duplication	<ul style="list-style-type: none"> • Identify exact and near duplicates and analysis tools to rapidly remove unnecessary copies
Cleaning & QC	Split	<ul style="list-style-type: none"> • Separate out contracts saved into a single PDF/file
	Linking	<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)
	QC by concept or doc/portfolio	<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
	Transform and Normalize Data	<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	Tags & Tagging Rules	<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
	Customize Content	<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
	Contract Tracker (beta)	<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
	RACI Matrix (beta)	<ul style="list-style-type: none"> • Assign RACI to concepts or obligations to individuals or groups (RACI = Responsible, Accountable, Consulted, Informed)
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.

Interesting Features

Search & Analyze	Simple Search	<ul style="list-style-type: none">• Grid view of all your contracts with simple search/filtering options
	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	<ul style="list-style-type: none">• "All Terms Report" for all contract content
	Compare	<ul style="list-style-type: none">• Select contracts and select 'Compare Key Terms' to view data from multiple contracts side by side
Share	Visualize	<ul style="list-style-type: none">• Use charts and graphs to present Catylex data visually for easier consumption
	Export to Excel	<ul style="list-style-type: none">• 'Share' to export data in Excel for multiple contracts or search results
Admini stration	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
		<ul style="list-style-type: none">• Manage users access to contracts via workspace• Manage account settings (including default views etc.)• Access user activity logs