

Summer Release 2023 (Part 1)

What is included in the release?

New Features

Spend Suite Template – Beta

- We are pleased to announce that the beta version of Spend Suite Template (Tableau) is being released as part of Summer Part 1 release which is scheduled for production upgrade on July 15th, 2023. Spend Suite Template will be generally available to all reporting clients after Summer Part 2 release which is scheduled for August end. Your beta period will run from July 17th through July 21st. Onit team will collect feedback through a survey on the week of July 24th. The feedback will be incorporated and will most likely be part of summer part 2 release. If you are interested in participating in this beta, please contact our Sr. Director of Reporting & Analytics - Naveed Syed Naveed.syed@onit.com
 - *Note: Only client admins will be able to see this Spend Suite Template through Onit on the release date. Clients will need to email Onit Support if new dashboard needs to be available for any other non-admin groups.*
- Spend Suite Template includes following features:
 - Upgraded charts and time series comparisons with flexibility to run metrics based on different dimensions within single dashboard.
 - Dynamically update KPIs based on year, quarter, and month selection.
 - Budgeting: Spend Suite includes aggregate budget tracking yearly/quarterly/monthly or lifetime budget tracking. It provides additional visibility in Vendor/Matter Budget through a hierarchy chart.
 - *Note: Onit's standard budgeting app needs to be configured within Onit ELM to reflect in the matter suite.*
 - Ability to View Spend by calendar year or fiscal year.
 - *Note: Fiscal year app must be configured within Onit ELM for the matter suite to return data based to client specific fiscal year, quarter and month.*
 - Flexibility to view year-to-date spend comparison between current period and same period of previous year or just view the 12 months rolling spend trend.
 - Navigate to Onit invoice page through Spend Suite itself.
 - Advanced filter to calculate Spend based on Invoice Approval and Invoice Paid date.
 - Organizing line items through UTBMS Code set and ability to export specific task codes across invoices.
 - Enhanced Aggregation Buttons to group Invoice Statuses and Spend.
 - Drill through features from bar charts to invoice grid view.
 - Ability to export invoices and invoice line items grids in excel or csv.

Matter Suite Template - Enhancements

- Addition of advanced filter to calculate Spend based on Invoice Approval and Invoice Paid date.

- Enhanced the grid reporting to breakdown Fees, Expenses, Discounts, Adjustments and Discount %.
Rearranged the columns in a logical sequence of the grids.
- Secured Matter Suite template is available for clients to use. This template will inherit Onit security to Tableau so users don't have to maintain security at 2 different places. Please get will Onit support or your account manager to enable this feature.