HIRING TEMPLATE

ELM System Administrator Job Description Template

Responsibilities, skills, working relationships, and first-year success measures

A ready-to-edit job description for the person who runs your enterprise legal management platform: users and access, configuration, matter data, the invoice flow, and reporting.



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BEFORE YOU START

How to use this template

1. Name the platform and the modules the seat owns in the title line and the role summary. Candidates search on the platform name.
2. Keep the responsibility groups that apply and delete the rest. A seat that owns all eight groups owns the whole system.
3. State the reporting line plainly. It tells candidates who sets their priorities.
4. Agree the success measures with the hiring manager before the posting goes out.

READ BEFORE POSTING

Replace the bracketed text, name your platform and modules, and delete any group the seat will not own. Shaded text in brackets marks where your own details go, for example *[platform]*.

No compensation line is included; add the posted range where your policy or the law requires one.

The guide behind this template: ELM system administrator job description

Role at a glance

Job title	ELM System Administrator *[add the platform if useful: e.g. Onit Administrator, Legal Tracker Administrator]*
Alternative titles	Alternative titles used in postings: ELM Administrator, Legal Systems Administrator, Legal Technology Specialist, Legal Operations Administrator.
Location and work arrangement	*[City; hybrid with (number) days onsite / remote within (country)]*
Reports to	*[Legal Operations Manager / Head of Legal Operations / Deputy General Counsel / General Counsel's Chief of Staff]*

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Role summary

[Company] is hiring an ELM System Administrator to run *[platform]*, the enterprise legal management system the legal department uses for intake, matters, eBilling and outside counsel spend. The role is first the business owner of the platform and then its technical owner: it decides how requests, matters, invoices and data should move through the system, then configures the platform to match, and coordinates the IT, integration and vendor roles that support the technical side. It owns legal service intake, users and access, configuration, matter data quality, the invoice flow and reporting, and is the day-to-day contact for lawyers, law firms, finance and the platform vendor. The legal department has *[number]* lawyers, *[number]* system users and *[number]* active law firms on the platform. In the first year you will *[the single first-year priority, for example: bring matter data to a standard legal leadership can report from]*.

Examples of ELM platforms this role may run: Mitratech TeamConnect, Onit, SimpleLegal, Thomson Reuters Legal Tracker, or [your platform].

Key responsibilities

Legal service intake and front door

- Design and maintain the request intake forms and request types that make up the legal department's front door.
- Configure triage and routing rules so each request reaches the right lawyer or team.
- Set up matter creation from intake, so accepted requests become matters with the right fields, owners and budgets.
- Track service levels on requests and report on volumes, response times and open items.
- Review request types and routing with legal leadership on a *[quarterly]* basis.

Users and access

- Add, change and remove users, roles and permissions as people join, move or leave the department.
- Keep access in line with *[Company]*'s security and data rules, working with IT on single sign-on and access reviews.
- Run a *[quarterly]* access review and record the result.
- Answer user questions and resolve access issues within *[agreed time]*.

Configuration and workflow

- Maintain approval chains, matter types, fields, rules, templates and notifications.
- Keep configuration current as billing guidelines, workflows and vendors change.
- Document every configuration change, with the reason and the approver.
- Test changes in *[a test environment / a controlled release]* before they reach users.

Matters and data quality

- Set up, update and close matters to the department's standards, or support the people who do.
- Keep matter status, budgets, owners and law firm assignments current.
- Run *[monthly]* data quality checks and correct the records that would distort reporting.
- Maintain reference data: entities, practice areas, matter types and cost centers.

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eBilling and invoice flow

- Onboard law firms and vendors to the platform, including rates and timekeepers.
- Keep billing rules and rate cards current and aligned with the outside counsel guidelines.
- Monitor the invoice flow from submission to approval and payment, and clear exceptions and rejected invoices.
- Coordinate with accounts payable and finance on payment, month end and year end.
- Support law firm billing teams with LEDES, UTBMS coding and submission questions.

Reporting

- Produce standard reports on matters and outside counsel spend on a *[monthly and quarterly]* schedule.
- Build ad hoc reports for legal leadership, finance and in-house lawyers.
- Support budgets, forecasts and accruals with data from the platform.
- Maintain the dashboards and saved reports the department relies on.

Vendor and platform relationship

- Act as the department's primary contact with the platform vendor's support team.
- Log, track and escalate issues until they are resolved.
- Review release notes and assess each release for impact on configuration and users.
- Give input to renewals, enhancement requests and the platform roadmap, with *[procurement / the Legal Operations Manager]*.

Change management, adoption and training

- Write release notes and user communications for every platform release and configuration change.
- Train lawyers, paralegals and law firms, with onboarding for new users and refresher sessions for existing ones.
- Track adoption metrics, such as active users, requests submitted through intake, matters updated on time and invoices submitted electronically, and act on gaps.
- Build and run a super-user network across practice groups and offices.
- Run a feedback loop: collect user requests and issues, prioritize them with *[the Legal Operations Manager]* and report back on what changed.
- Maintain user guides, job aids and an internal knowledge base for the platform.

Required skills and experience

- *[2 to 10]* years of hands-on administration of an ELM or eBilling platform, ideally *[platform]*.
- Working knowledge of matter management and of how law firm invoices move from submission to payment.
- Familiarity with LEDES invoice formats, UTBMS codes, rates and timekeepers.
- Strong reporting and spreadsheet skills, and an eye for records that distort reports.
- Ability to turn a billing guideline or approval policy into configuration, and to test it.
- Clear, patient communication with lawyers, staff, law firm billing teams and IT.
- Organized, with a habit of documenting changes and decisions.

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Preferred qualifications

- A platform certification for the ELM the department runs, where the vendor or its partners offer one.
- CLOC Academy courses in technology or financial management.
- A project management credential, such as PMP, for a seat that will lead implementations or upgrades.
- Experience with integrations between the ELM and finance, accounts payable or single sign-on systems.
- Experience in *[industry]* or in a legal department of similar size.
- *[Paralegal or legal operations background, if the seat needs it.]*

See swiftwaterco.com/insights/legal-operations-certifications/ for an overview of the credentials available.

Working relationships

Legal Operations Manager or Head of Legal Operations	Priorities, configuration approvals, roadmap.
In-house lawyers and paralegals	Matter setup, approvals, support and training.
Law firms and legal vendors	Onboarding, rates, invoice submission and rejections.
Accounts payable and finance	Payment, month end, year end, budgets and accruals.
IT and security	Access, single sign-on, integrations and data rules.
Technical roles (IT, integrations, infrastructure, vendor support)	The administrator sets the business priorities and coordinates upgrades, infrastructure changes, integrations and security work carried out by these teams.
Procurement	Platform renewals and vendor terms.
Platform vendor	Support tickets, releases and enhancement requests.

Success measures (first year)

- ☐ Access requests and user questions resolved within *[agreed time]*.
- ☐ Intake requests acknowledged and routed within *[agreed time]*, with service levels reported monthly.
- ☐ Adoption targets met: *[percentage]* of requests submitted through intake and *[percentage]* of active users working in the platform each month.
- ☐ Matter data meets the department's data standard in *[percentage]* of active matters at each monthly check.
- ☐ Invoice exceptions cleared within *[number]* business days; no invoice held past *[number]* days without a reason recorded.
- ☐ Standard reports delivered on schedule every month and quarter.
- ☐ Every configuration change documented, tested and approved before release.
- ☐ Each platform release assessed and communicated before it reaches users.
- ☐ New users and law firms trained within *[number]* days of joining the platform.

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A FRACTIONAL OR MANAGED ALTERNATIVE

Need the seat covered while you hire?

Some departments need ELM administration for part of the week, need cover while a seat is open, or have no one inside who has run the platform before. In those cases a fractional or managed administrator can run the platform inside your systems, against agreed service levels, while you decide on a permanent hire. Swiftwater provides ELM system administration for the platform you run: administration, reporting and continuous improvement, with cover when your administrator leaves or is out. Engagements are full managed, co-managed or project-based, with no minimum commitment.

Hiring a practitioner can speed up the work and bring in common industry best practices while the permanent seat is filled.

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