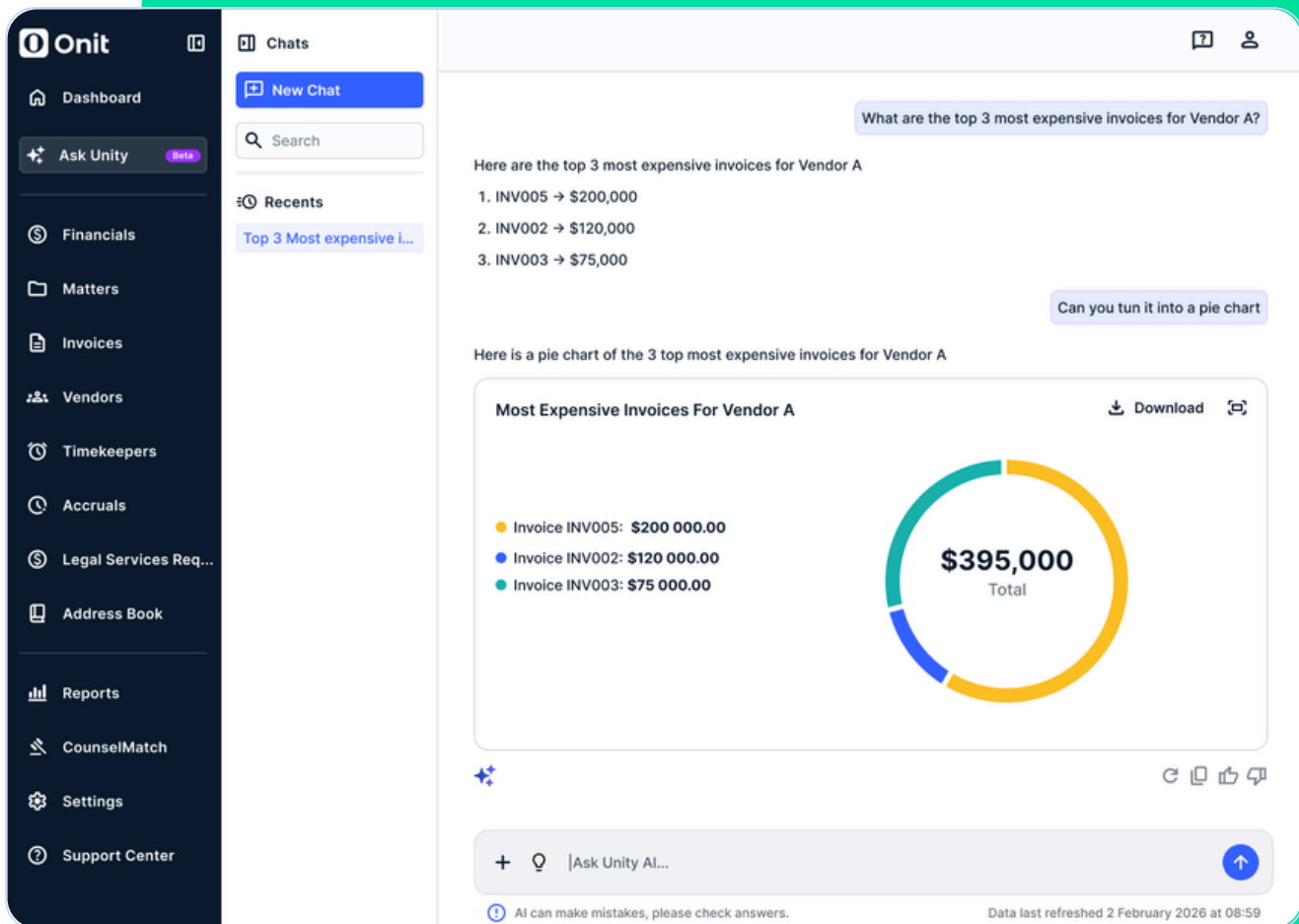


# Ask Unity (beta)

# Prompting Guide



The screenshot displays the Onit Ask Unity interface. On the left is a dark sidebar with navigation options: Dashboard, Ask Unity (beta), Financials, Matters, Invoices, Vendors, Timekeepers, Accruals, Legal Services Req..., Address Book, Reports, CounselMatch, Settings, and Support Center. The main chat area shows a conversation with the following content:

**Chats**

[New Chat](#)

Search

**Recents**

[Top 3 Most expensive i...](#)

What are the top 3 most expensive invoices for Vendor A?

Here are the top 3 most expensive invoices for Vendor A

1. INV005 → \$200,000
2. INV002 → \$120,000
3. INV003 → \$75,000

Can you turn it into a pie chart?

Here is a pie chart of the 3 top most expensive invoices for Vendor A

**Most Expensive Invoices For Vendor A** [Download](#) [Share](#)

| Invoice        | Amount       |
|----------------|--------------|
| Invoice INV005 | \$200 000.00 |
| Invoice INV002 | \$120 000.00 |
| Invoice INV003 | \$75 000.00  |

**\$395,000**  
Total

+ | Ask Unity AI... [Send](#)

AI can make mistakes, please check answers. Data last refreshed 2 February 2026 at 08:59

**Ask Unity** <sup>(beta)</sup> is an AI-powered data exploration tool designed to revolutionize how legal operations teams interact with their legal data. Instead of navigating multiple dashboards or building reports, you can simply ask questions in plain English and receive data-driven answers in seconds. The tool supports a variety of use cases, from quick ad hoc queries to more complex financial analysis.

What sets Ask Unity apart is its ability to not only answer questions but also generate AI-powered visualizations—including pie charts, bar charts, line graphs, and more—that can be downloaded and embedded into executive presentations.

## How To Get the Best Results

Here, we'll go over ways to get the most out of your Ask Unity usage – including example prompts, tips for getting better prompt results, and what Unity can (and can't yet) answer.

### Example Prompts

In addition to the pre-built Ask Unity prompts, you can create your own or further customize the examples provided below based on your organization's specific needs and spend questions. **The prompts below are basic/common examples intended as a quick guide on how to word queries.**

Show me a pie chart with spend for the top 10 vendors after all adjustments and taxes for 2024.

Can you list the matters that had rejected invoices in 2025 and the number of rejected invoices for each?

Show me a line chart with annual final spend by month for 2024.

Which vendor had the most rejected invoices in 2024?

Which month had the highest total spend for 2025 after adjustments and taxes?

How many vendors submitted invoices in 2024?

Show me a list of vendors that currently have invoices in "received" and "on hold" statuses.

How many invoices were received in 2024?

How many open matters had no invoicing activity in 2024?

If the query you enter is too ambiguous, Ask Unity will ask for clarification. Make sure that your prompt is as succinct as possible. For example, we recommend specifying whether you are looking for spend amounts that were billed or final spend amounts (i.e., after adjustments and taxes).

## Tips for Getting Better Prompt Results

✦ Be clear about what you're trying to accomplish or learn. Instead of asking a general question, include details such as billed vs. final spend, invoice status, matter, vendor, or timeframe.

- **Bad prompt:** Show me invoices.
- **Why is it unclear?** No timeframe, no grouping, no metric.
- **Better prompt:** Show me the number of invoices received by vendor in 2024.

✦ Sometimes a question may be too vague for Ask Unity to interpret correctly; adding more detail can improve the result. If your question is ambiguous, Ask Unity may ask for more information.

### Example 1:

- **Bad prompt:** Who are the most expensive timekeepers?
- **Why is it unclear?** What does expensive mean? Be specific on how you define "expensive."
- **Better prompt:** Provide the top 25 timekeepers with the highest billed rate in USD currency.

### Example 2:

- **Bad prompt:** Which vendor is the biggest?
- **Why is it unclear?** Define "biggest" by a metric, is it by spend, vendor, invoice submission, or hours billed?
- **Better prompt:** Which vendor submitted the largest quantity of invoices for the last 12 months?

### Example 3:

- **Bad prompt:** How much spend is for Hart & Wright?
- **Why is it unclear?** Define "Hart & Wright" and spend.
- **Better prompt:** What is the final spend from vendor Hart & Wright for 2020-2025?

✦ Add context when it matters (who this is for, why you need it, or any relevant background). If you want clearer results to present to an audience, you can specifically state the audience in your prompt, so the response is tailored to suit your needs.

✦ Break complex requests into smaller, more focused questions. If your question is complex, start with one part at a time.

- **Bad prompt:** Show me vendors with the highest rejection rates and their spend for the last 3 years.
- **Better prompt:**
  1. Show me the top 15 vendors with the highest invoice rejection rates in 2024.
  2. What is the spend for those vendors for the last 3 years?

✦ Call out any preferences up front, such as format, level of detail, or style.

✦ Treat it as a "conversation refine" or follow up if the first response isn't quite right. Use follow-up questions to clarify, adjust, or go deeper rather than starting over. You don't need to start over if the first answer isn't perfect. Instead, refine the conversation.

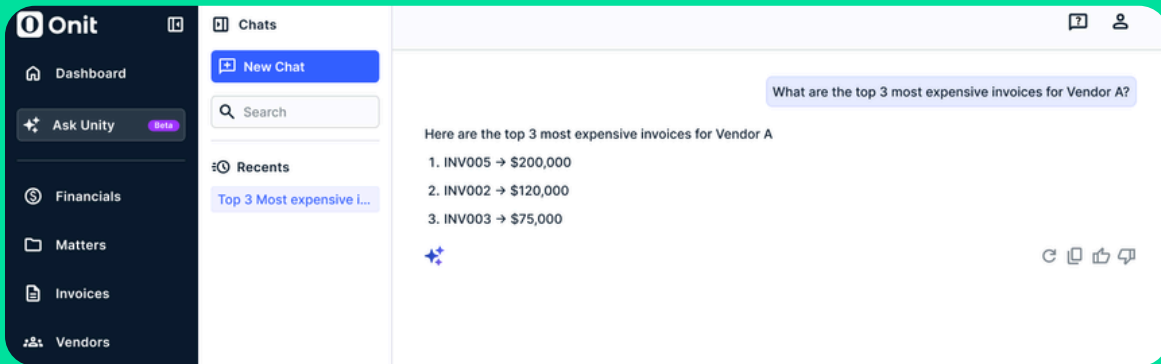
### Example:

**User:** show me matter spend

**Follow up:** Show only the top 10 matters by spend in a table format

**Follow up:** In the table, add a column after "matter name" for the number of vendors assigned to the matter

**Follow up:** Remove X matter from the table



## What Ask Unity can analyze today

Ask Unity currently supports basic querying on Unity eBilling data, including:

-  **Invoices**
-  **Matters**
-  **Vendors**
-  **Invoice line items**
-  **Timekeepers**

Future Ask Unity capabilities will deepen intelligence across ELM datasets such as budgets, accruals, AFAs, practice areas, and matter allocations, while extending AI-powered insights across CLM and the broader Unity platform. Soon, you'll be able to ask more analytical questions as well, like identifying trends or anomalies.

## Data Access and Visibility

- Ask Unity follows the same permission model used within Unity.
- Responses are based on the data that the user is authorized to access.
- Because of role-based permissions, different users may receive different results for the same prompt.

## FAQs

- Ask Unity leverages a large language model (LLM) to generate responses and insights based on user inputs and available legal data, improving efficiency and supporting more informed decision making.
- Data used by Ask Unity is refreshed once every 24 hours. This means that if you ask the same question the next day, there may be a slight variation in the response if, for example, invoices were approved, rejected, adjusted, or marked as paid within that 24-hour period.
- Ask Unity provides responses based on the data you can access per your user role. This means that the responses you receive may not match those received by a co-worker.
- Financial calculations with negative values may be provided if you are asking for information on the amount of adjustments, discounts, or other deductions made to invoices.
- If your query does not specify a year or timeframe, Ask Unity will provide a response based on all historical data available.
- Go to existing reports to validate responses or ask follow-up questions to the LLM.