

USE CASES

Context-aware workspaces for case, matter, and document work

How legal teams, schools, lenders, and enterprises use Twala workspaces and Lex, the AI inside Twala, to manage matters, draft documents, extract data, and close the loop with eSignature and eNotarization.

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ABOUT THIS PAPER

This paper explains how a Twala workspace is structured, how its AI stays aware of the scope, sources, and permissions of each request, and how organizations in legal, education, financial services, real estate, human resources, government, healthcare, and professional services apply it. It closes with the governance controls that keep AI-assisted work under human control.

THE TWALA WHITEPAPER SERIES

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01

Executive summary

Most document work is not about a single file. A lawsuit, a loan, a lease portfolio, an admissions cycle, or a grant proposal is a body of related documents, people, deadlines, and decisions.

Twala organizes each body of work into a **workspace**: a private, permissioned home for its files, task boards, tags, drafts, signed envelopes, and notarized documents. The AI inside it is **context-aware**. Lex answers, drafts, and extracts from the files in the workspace you are working in, within the permissions of the person asking, and it names the sources it used.

The result is a single place where a team can understand a matter, produce the next document, pull out the data that matters, get it signed and notarized, and track what happens next, without exporting anything between tools.

12 Integrated capabilities on one platform	30 Typed fields per data extraction	200,000+ Documents in the Philippine Laws and Jurisprudence library	6 Lifecycle stages in one document record
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What “context-aware” means on Twala

- **Scoped.** Lex works on the file, folder, task board, or workspace you point it at.
- **Grounded.** Answers come from your own documents first, then from curated libraries, and from the web only when you ask, with every source named.
- **Permission-aware.** Lex answers only from files the person asking can open.
- **Private.** AI search is switched on file by file, and no customer data is ever used to train AI models.

02

Anatomy of a workspace

A workspace is a private, permissioned container for one body of work: a client matter, a department, a project, a portfolio, or a research program. Personal workspaces stay with their owner. Team workspaces are private until they are shared, and each teammate is given no access, view access, or edit access, item by item.

WHAT A WORKSPACE HOLDS

COMPONENT	WHAT IT DOES
Files and folders	PDF, Word, Excel, CSV, text, and Markdown files, or whole folders with their structure kept. Nested folders, stars, recent files, and a 30-day trash.

COMPONENT	WHAT IT DOES
AI search, per file	Each file is included as AI context only when AI search is turned on for it. A marker on each file shows its status.
Version history	Edited PDFs, Twala documents, text, Markdown, and CSV files keep earlier versions to compare, download, or restore.
Task boards	Kanban boards with custom columns, linked files, assignees, due dates, comments, and task IDs such as LSE-12.
Tags and Smart tags	Color-coded workspace tags for files and tasks, with AI-suggested tags drawn from each file's content.
Ask Lex	Chats scoped to a file, a folder, a board, or the whole workspace, with answers that name their sources.
Document editor	A template gallery, AI drafting with proposals to apply or dismiss, comment threads, and PDF or Word export.
Data extraction	Typed fields read from a file with a confidence level for each value, exported as CSV or JSON.
Envelopes and notarizations	Signed and notarized documents saved back to the workspace they belong to, each with its full history.
Reports	Workspace, file, task, envelope, team, and contact reports for any date range, as CSV or PDF.
Search	One search across workspaces, boards, tasks, folders, files, tags, envelopes, notarizations, templates, and contacts.

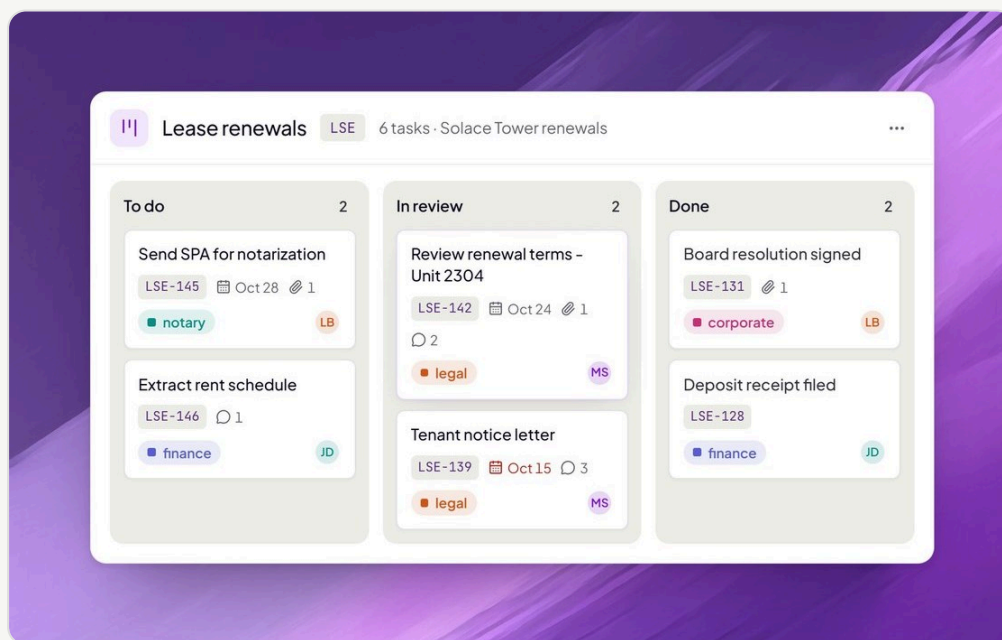


FIGURE 1 A task board for lease renewals, with linked files, due dates, assignees, and tags. Each task carries an ID from its board.

How context-aware AI works

Three things shape every answer Lex gives: the scope you choose, the permissions of the person asking, and a fixed order of sources.

THE ORDER LEX FOLLOWS FOR EVERY QUESTION

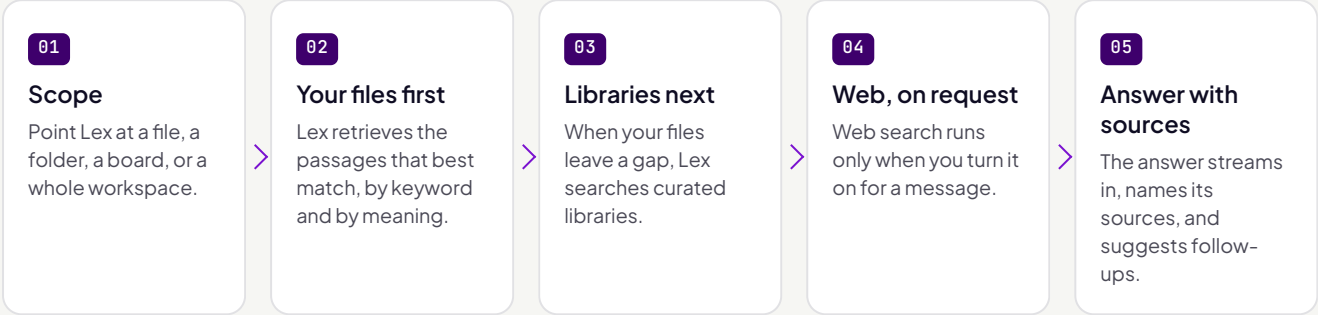
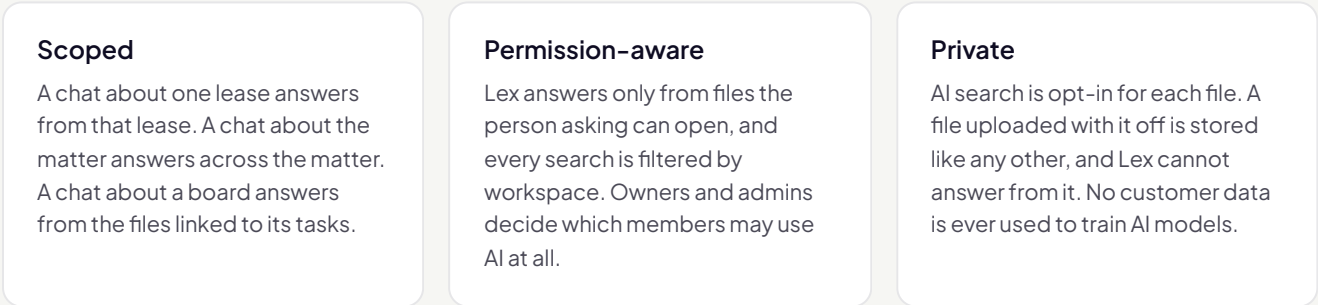


FIGURE 2 Lex answers from the narrowest trustworthy source first and tells the reader exactly where each answer came from.

When a file is uploaded with AI search on, Twala divides it into passages and indexes them for retrieval by keyword and by meaning, an approach known as Retrieval-Augmented Generation (RAG). Answers are grounded in the customer’s own documents rather than in general knowledge, and every answer lists the files it drew on so the reader can open the source and check it. Users choose **Fast** for everyday answers or **Thinking** for slower, deeper reasoning that can be expanded above the answer.



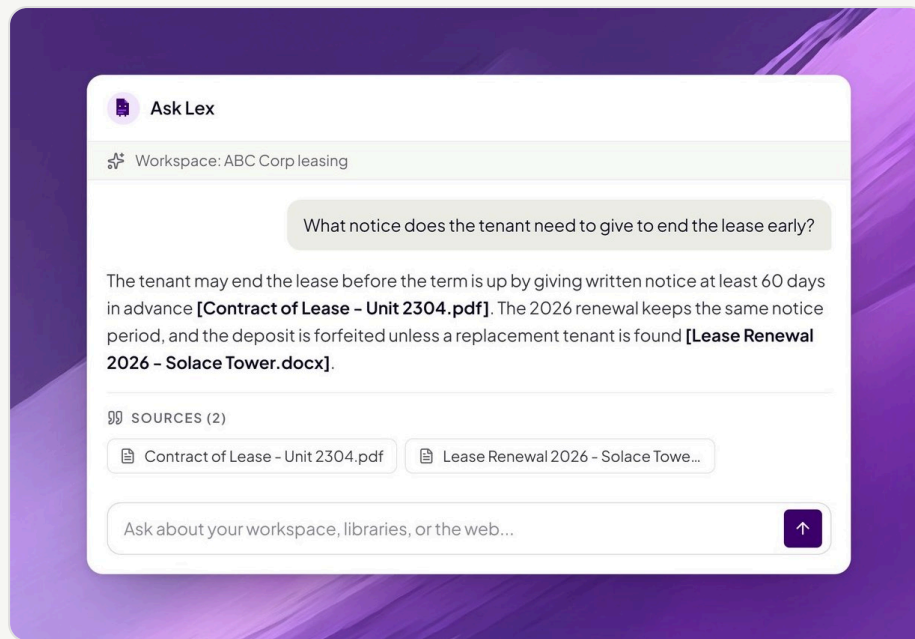


FIGURE 3 Ask Lex answers a question about a lease and names the two files the answer came from.

04

Core workflows inside a workspace

Ask across the body of work

Find the clause, figure, or commitment that matters without reading every page, and see which file each answer came from.

Draft from context

Start from the template gallery or a blank page. Lex drafts from the document and the workspace files, and proposes each change for a person to apply or dismiss.

Extract structured data

Name up to 30 typed fields or reuse a saved template, and receive each value with a High, Medium, or Low confidence rating, ready as CSV or JSON.

Review and compare

Highlight, strike through, annotate, draw on, and date-stamp PDFs in the browser, and compare versions side by side with synchronized scrolling.

Organize automatically

Smart tags suggests tags from each file's content once Lex has read it. One click adds the tag, and a new suggestion creates it.

Track deliverables

Kanban boards link tasks to files, assign owners and due dates, and mark overdue work on the card.

Sign and notarize

Send documents for signature from the workspace, request an eNotarization, and save the sealed results back where they belong.

Report

Export workspace summaries, file inventories, board tasks, and envelope activity as CSV or PDF, for one person or the whole team.

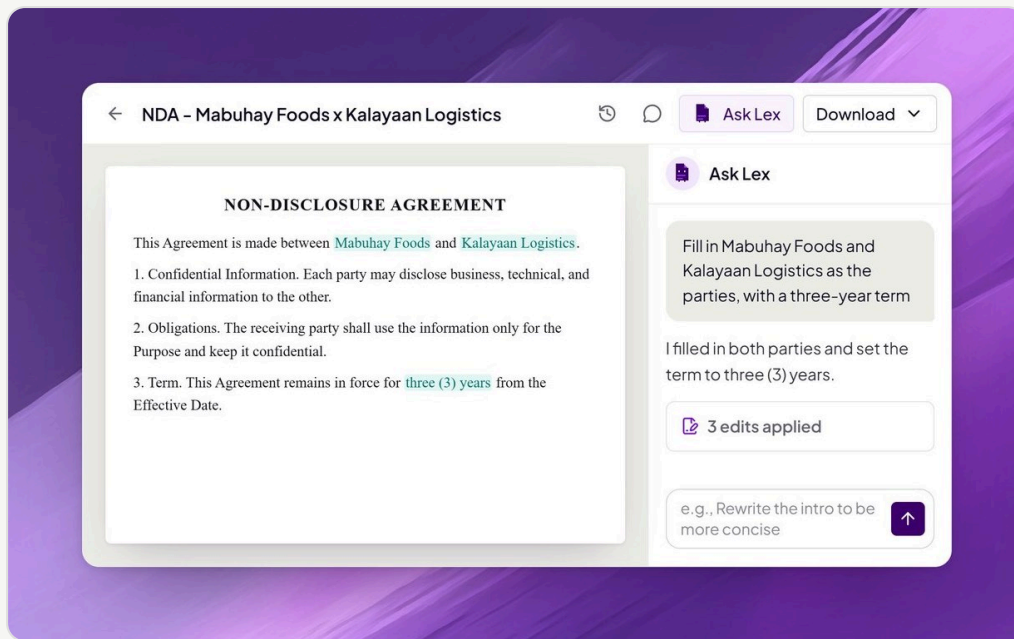


FIGURE 4 Drafting in Twala's editor: Lex fills in the parties and term of an agreement, and each edit is applied only when a person accepts it.

05

Legal: case and matter management

For law firms, in-house legal departments, and Electronic Notaries Public, a workspace maps naturally to a client matter. Each matter is private and isolated. It holds every pleading, contract, and piece of correspondence, and carries its own task board, tags, and AI context, so research and drafting draw only on that client's documents.

A MATTER, FROM INTAKE TO CLOSE

01 Open the matter

Create a workspace for the client matter, invite the team with the right roles, and upload the intake documents with AI search on.

02 Understand the record

Ask Lex what the documents say about a disputed clause, a deadline, or a party's obligations, then open the cited files to confirm.

03 Research the law

With the Philippine Laws and Jurisprudence library switched on, Lex searches Republic Acts, Supreme Court decisions, legal opinions, and regulatory materials when the matter's files leave a gap, and names the library it used.

04 Draft

Start a memo, demand letter, contract, or pleading in the editor. Lex drafts from the matter's files, and every proposed change waits for a lawyer to apply it.

- 05

Review and finalize

Colleagues comment in threads, mark up PDFs, and compare versions before the final is exported to Word or PDF.
- 06

Execute

Send agreements for eSignature in a defined signing order, and request eNotarization where the law or the receiving party requires a public document.
- 07

Manage deadlines

Track filings, hearings, renewals, and follow-ups on the matter’s board, with owners and due dates.
- 08

Extract and report

Pull parties, dates, amounts, and terms from many agreements into one table, and report on matter activity for the client or the partner.

FROM CHALLENGE TO CAPABILITY

WHAT LEGAL TEAMS STRUGGLE WITH	HOW TWALA ANSWERS IT
Reading hundreds of pages to find one clause	Ask Lex across the matter, with named sources
Drafting contracts and briefs from scratch	Templates and AI drafting from the matter’s own files
Chasing signatures and tracking who reviewed what	Envelopes with signing order, reminders, and activity history; comments and version history on every draft
Keeping client files confidential across matters	Private, isolated workspaces with item-level access and permission-aware AI
Legal research on a deadline	The Philippine Laws and Jurisprudence library, cited by name in every answer that uses it
Notarizing for clients in other provinces	Remote electronic notarization through a Supreme Court–accredited facility

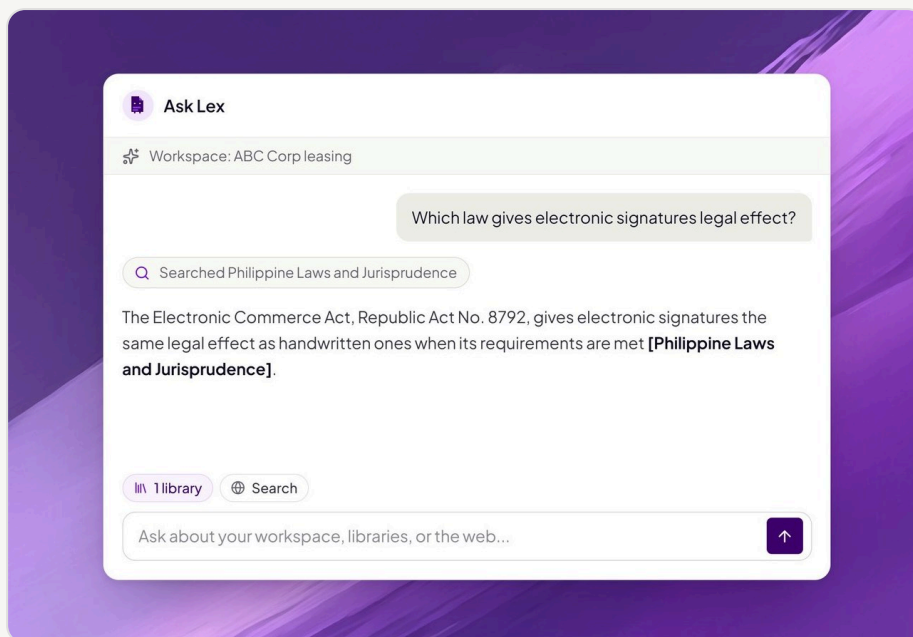


FIGURE 5 Ask Lex searches Philippine Laws and Jurisprudence when a matter's files leave a gap, and cites the library by name.

For Electronic Notaries Public

Lawyers who hold an electronic notarial commission run research, drafting, and notarization in the same account. Between sessions, Lex can look up the rule a client asked about while the notarial register keeps itself. The Professional plan is built for solo lawyers who want document management and AI tools alongside notarization, and the Business plan adds seats for staff.

06

Education and research

Schools, universities, and research institutions manage admissions files, approvals, institutional agreements, and growing libraries of papers and grant materials, often across several campuses.

Admissions and enrollment

Collect signatures on admissions and enrollment documents from any device, with standardized templates and a complete audit trail.

Internal approvals

Route memoranda, requests, and administrative documents through approvers and signers in order, across campuses and departments.

Research libraries

Keep each project's papers in its own workspace, ask questions across the collection, and get answers that name their source files.

Proposals and reviews

Turn research materials into structured drafts of grant proposals, literature reviews, and reports, starting from a template.

Annotated collaboration

Highlight, underline, and annotate PDFs, then share them with co-authors and supervisors who can view or edit.

Organized collections

Tag papers by topic and method, with Smart tags suggesting tags from each paper's content.

In practice

Lyceum of the Philippines University partnered with Twala in August 2025 to digitize internal approvals, student-related documents, and administrative processes, with expansion planned across its five campuses in Manila, Laguna, Cavite, Davao, and Batangas. In legal education, Twala's strategic collaboration with the UP College of Law covers capacity building in legal technology, legal research and innovation, and the development of policies and frameworks for the use of AI in legal practice.

■ 07

Banking, lending, and cooperatives

Lenders digitized applications and credit decisions years ago. Twala extends that to the documents that make a loan enforceable, and to the records an auditor or a collection case will later ask for.

- **Draft** loan documents from finance and legal templates, with Lex proposing edits for approval.
- **Sign** with envelopes that place the borrower, co-makers, and the lender's officer in order, with automatic reminders and a timeline of who opened, signed, or declined.
- **Notarize** loan agreements, mortgages, and powers of attorney remotely or in person, with each borrower's identity verified before the session.
- **Extract** principal, rate, term, maturity date, and collateral into CSV or JSON for loan servicing.
- **Control** access with team roles, and decide member by member who can use notary features.

In practice

The National Confederation of Cooperatives Bank moved approvals for payment requests, cash advances, and HR documents from printed routing to Twala. Preparers work on laptops while approvers sign from their phones wherever they are, and the audit trail keeps the bank audit-ready. The National Confederation of Cooperatives (NATCCO) signed a two-year contract with Twala in 2023 to digitalize the cooperative sector.

■ 08

Real estate and property management

Property businesses run on leases, deeds, and powers of attorney, and on dates that must not be missed.

- **Lease portfolios.** Extract the lessor, lessee, unit, monthly rent, term, and escalation clause from every lease into one table, with a confidence level on every value.
- **Renewals.** Track renewal work on a board, have Lex draft the renewal from the prior lease and the template, and send it for signature.
- **Developers and brokers.** Give each project its own team workspace, with roles that decide who drafts, who sends for signing, and who requests notarizations, and reusable signing templates for every buyer.

- **Deeds, SPAs, and leases.** Notarize remotely for parties in different provinces. Recipients verify any eNotarized document on Twala’s verify page, and any change after notarization is detected.

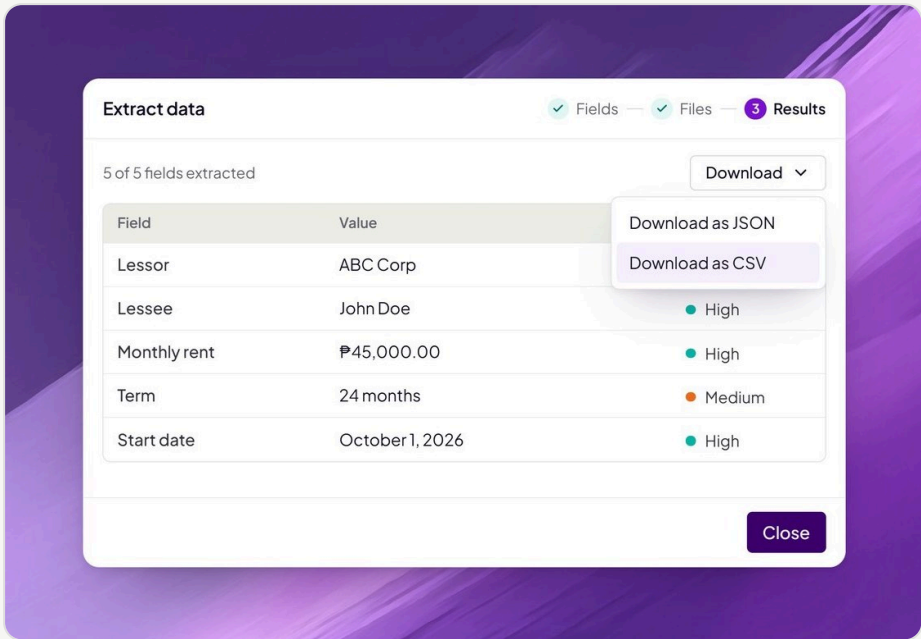


FIGURE 6
Data extraction on a lease: five fields with their confidence, ready to download as CSV or JSON.

09

Human resources

- Offers, employment contracts, and policy acknowledgments signed by eSignature and filed the same day.
- Quitclaims, affidavits, authorizations, and salary loan agreements notarized remotely, with the employee joining from anywhere in the Philippines.
- Employee files kept in HR workspaces with item-level access, and notary features enabled only for authorized staff.
- Onboarding and offboarding checklists on task boards, with separation dates and amounts extracted to CSV for payroll.
- Employees can have Twala explain a document before they sign it, with flags to review, a summary, and the key points.

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Government

- Internal approvals and memoranda routed digitally, consistent with Commission on Audit Circular 2021–006, which allows electronic, secure electronic, and digital signatures in government transactions.
- Memoranda of agreement, supplier contracts, and authorizations drafted, signed, and notarized on one platform, and kept in team workspaces with roles and access controls.
- Frontline acceptance of eNotarized documents, verified at the counter from the PDF itself.

- Enterprise controls for agencies: single sign-on, SIEM integration, advanced logging, and a guaranteed SLA.

In practice

The Senate of the Philippines signed a memorandum of understanding with Twala to move paper-based internal processes online, the Senate's first such agreement with a Filipino technology startup. Twala has also signed memoranda with the Anti-Red Tape Authority and the National Development Company, and presented its platform to more than 300 employees of the Philippine Economic Zone Authority.

■ 11

Healthcare, life sciences, and quality systems

Clinical, safety, and quality teams need fast answers from long protocols, and records that satisfy auditors and regulators.

- Ask questions across protocols, compliance documents, and internal reports, with answers that link to their source files.
- Produce compliance summaries, briefings, and overviews from source materials in minutes.
- Route sign-off through approvers and signers in order, and track follow-up on task boards.
- Keep sensitive documents open only to the team members they are shared with.

In practice

Celltrion Global Safety Data Center, which handles post-marketing surveillance for markets including the European Union, Australia, and Canada, uses Twala within its quality management system to sign, review, and approve standard operating procedures, work instructions, and deviation reports with a complete audit trail. The team reported a 75% improvement in turnaround time and costs 30% lower than the alternatives it evaluated.

■ 12

Finance and professional services

Finance teams

Get answers from annual reports, filings, and audits with the source files named; produce memos and summaries from source material; annotate PDFs with version history; and pull figures into a table with a confidence level on each value.

Consulting firms

Get answers from client briefings and reports; draft proposals and case studies from templates and uploaded documents; share a workspace per engagement; and manage deliverables on shared boards.

Security and technology firms

Secuna, a cybersecurity company, replaced a manual cycle of copying templates, editing placeholders, and emailing PDFs with agreements generated, sent, signed, and tracked on Twala, and rated it 10 out of 10 for cost savings, turnaround time, and compliance.

Operations and procurement

Supplier contracts, purchase approvals, and budget sign-offs move in envelopes with signing order and reminders, and envelope reports show where each one stands.

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Extraction templates teams reuse

Teams keep one extraction template for each kind of document they handle every week. Every new document of that kind then starts from the same field set, with the same hints and rules.

TEAM	DOCUMENT	FIELDS TO EXTRACT
Property and admin	Lease agreements	Lessor, lessee, unit, monthly rent, start date, end date, escalation clause (yes or no), security deposit
Lending and cooperatives	Loan and credit agreements	Borrower, principal amount, interest rate, term, maturity date, collateral, co-maker (yes or no)
HR	Employment contracts	Employee, position, start date, salary, probationary (yes or no)
Legal and operations	Notarized special powers of attorney	Principal, attorney-in-fact, powers granted (a list), date of notarization, notarial register entry
Procurement	Service and supply agreements	Supplier, contract value, payment terms, automatic renewal (yes or no), termination notice period

Fields are typed as text, number, date, currency, yes or no, or a list. A **hint** tells the AI where a value lives, such as a specific section or annex, and a **rule** applies to the whole file, such as how dates are written. Values can be corrected inline before download, and every extraction stays with its file.

14

Governance: AI that stays under your control

AI makes document work faster. Twala is designed so that it never makes the professional optional.

PRINCIPLE	HOW TWALA ENFORCES IT
Sources on every answer	Lex names the files and libraries it used, so every statement can be checked.
People approve every change	Drafting arrives as proposals. Nothing enters a document until someone clicks Apply.
Opt-in context	AI search is enabled file by file. A file with it off is never read by Lex.
Separation by design	Workspaces are private until shared, and Lex follows the same access rules as the person asking.
Administrative control	Owners and admins switch AI and notary features on or off for each member.
Private by design	Lex runs privately within Twala’s own secured environment, and no customer data is ever used to train AI models.
Data protection	Personal data is handled under the Data Privacy Act of 2012, with a formal Privacy Manual and a designated Data Protection Officer.

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Outcomes

80% Faster turnaround time reported across Twala customers	40% Savings in time and materials per agreement	75% Turnaround improvement reported by Celltrion Global Safety Data Center	30% Lower cost than alternatives, as reported by the same team
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Because the draft, its comments, the signing envelope, the notarial record, and the cryptographic seal all belong to the same document, a context-aware workspace does more than speed up individual tasks. It removes the reconciliation work between them, and it keeps the knowledge in a matter or portfolio searchable, extractable, and reusable for the next one.

■ ABOUT TWALA

Twala is a Philippine legal technology company and a Supreme Court–accredited Electronic Notarization Facility (ENF). Its platform brings AI contract generation and review, eSignature, electronic notarization, and secure storage together, with every document sealed and independently verifiable through HashOrigin™ technology. Founded in 2020 and operated by Ohelio Inc., Twala serves more than 600 companies and 1.3 million individual users. Twala is backed by DOST-PCIEERD through its Startup Grant Fund Program and is a member of the Cloud Signature Consortium.

■ CONTACT

For investor relations, partnerships, and enterprise inquiries, email info@twala.ai or visit twala.ai.

Book a demo, explore pricing, or verify a Twala document at twala.ai. Technical details of HashOrigin™ are at hashorigin.io.

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