Best Practices in eCounsel

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MEET YOUR PRESENTERS

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Best Practices in eCounsel

TOPICS

- Design
  - Configuration
  - Security
- Data Entry
- Other
- Question and Answer Session

DESIGN CONFIGURATION

- Plan it carefully
- Know your users, **power users** and other stakeholders and rely on them for their expertise
- Talk to your users about what THEY want
  - **Know exactly what would make the project successful**
- Involve the users in the design process to gain buy-in
- Have your users test changes
- Look for unintended consequences or conflicting design choices
- Mitigate the chance of misunderstanding how changes might affect upstream or downstream processes as well as existing documentation
- Always update the design document
- Conduct a post implementation review
- Look for Continuous Improvement

DESIGN CONFIGURATION

- Matter Types
  - Keep it simple
  - Always weigh configuration maintenance
- Player Roles
  - Keep it simple, roles are not meant to be job titles
  - Look for unclear or contradictory values in these lists
  - Consider how reports might be impacted
- Configuration Updates
  - Do not configure the application in a vacuum
  - Always consider how **new** configurations will look, feel and function with the **current** configurations
  - Always consider current “data” and how configurations might affect it.

DESIGN CONFIGURATION

- User Fields
  - Consider carefully before adding user fields. Consider if the field is necessary and where it will be located.
  - “Restrict” the data entry capability (field type) as much as appropriate.
- View Profiles
  - Use to limit what a user can “see” and to a degree, what they can edit. This includes access to modules such as invoice, wizards, reports and so on.

DESIGN CONFIGURATION

- New Matter Wizards
  - Makes data entry easier by cobbling information from the matter screens (forms) onto one linear screen (form)
    - Consider who will be doing the data entry (your audience)
    - Consider how using it may change future workflow
    - Consider what elements/fields to add on the screen
    - Consider where to add on the screen
    - Consider potential impact on “rules”

DESIGN CONFIGURATION

- Lookups
  - Making lookup values historical.
  - Consider using “Parent/Child” lookups

TOPICS

- Design
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- Other
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TOPICS

- Q & A
- Other’s Lessons Learned or Tips

SECURITY

- Take the time to understand the security model
  - Various Access Profiles
    - Database Access
    - Wizard Access
    - Widget Access
    - Report Access
  - Logical Group Profile
  - Invoice Logical Group
  - Private Matters
  - Limited Privilege Users
  - Individual Security Attributes

SECURITY

- How much is too much?
- Consider who will run reports and how they will be distributed within your organization.
- Can my setup and/or process handle “one offs”?
- Can my setup accommodate a person’s absence (i.e. impede our ability to get the job done)?

SECURITY Q & A

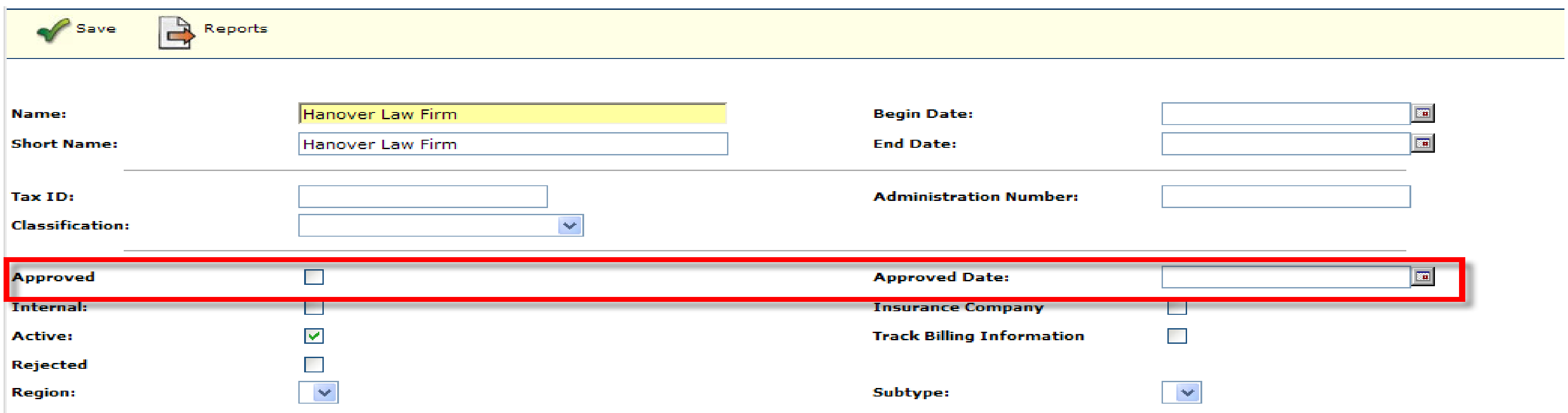
- Q & A
- Other’s Lessons Learned or Tips

DATA ENTRY

- Validate using “Reports” and “Searches”
  - Use the **Reporting** and **Searching** capabilities to validate that the data entry has been correctly and completely entered
  - Look for anomalies or inconsistencies in the data
  - Use as feedback to train the users and to correct the data and update the configuration

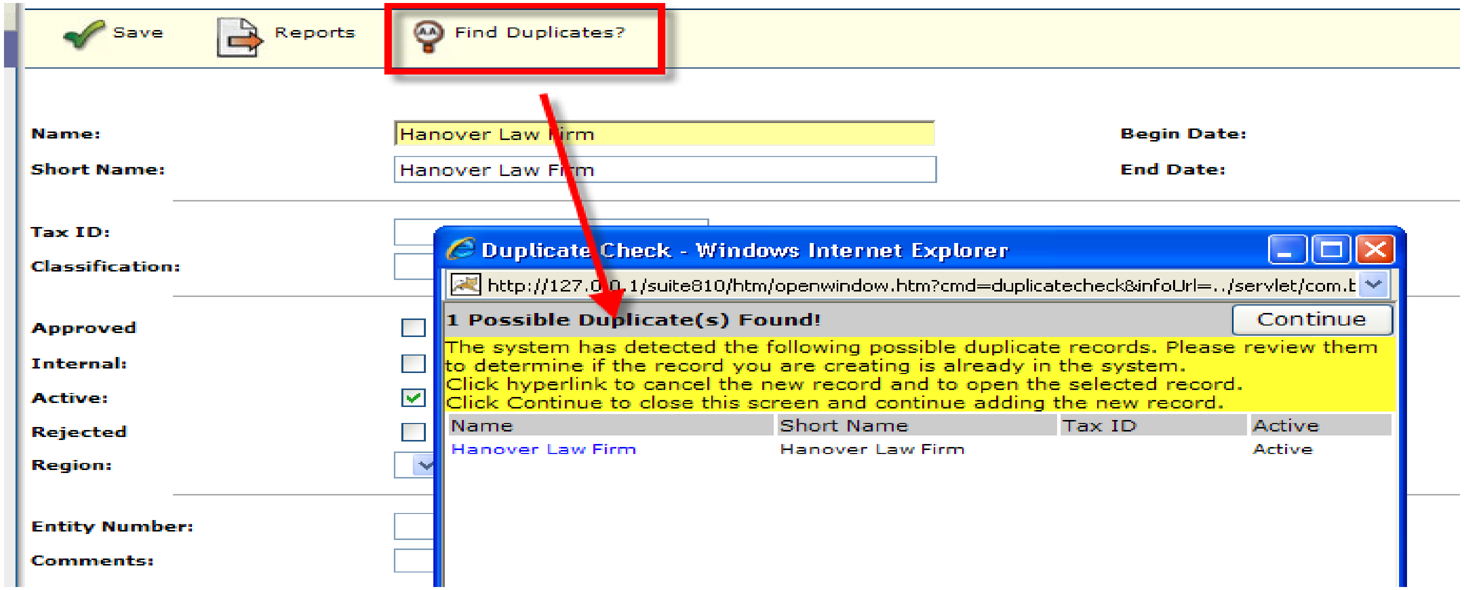
ENTITY DATA ENTRY

- Entities
  - Use “Approved” and “Approved Date” to route/find newly added Entities, carefully



ENTITY DATA ENTRY

- Entities
  - Use the “Duplicate Check” feature

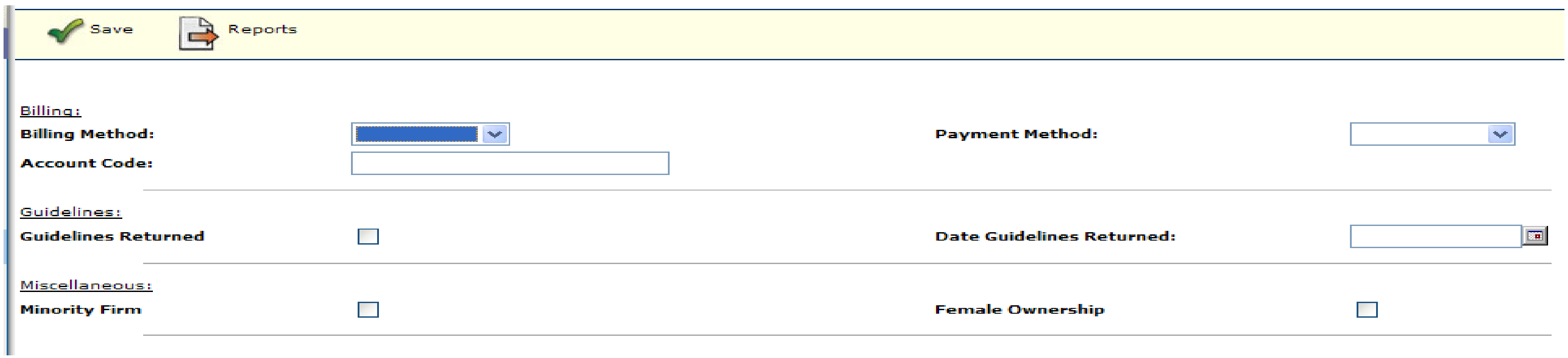


ENTITY DATA ENTRY

- Use the “Contacts” feature to “copy” contact information from one record to another

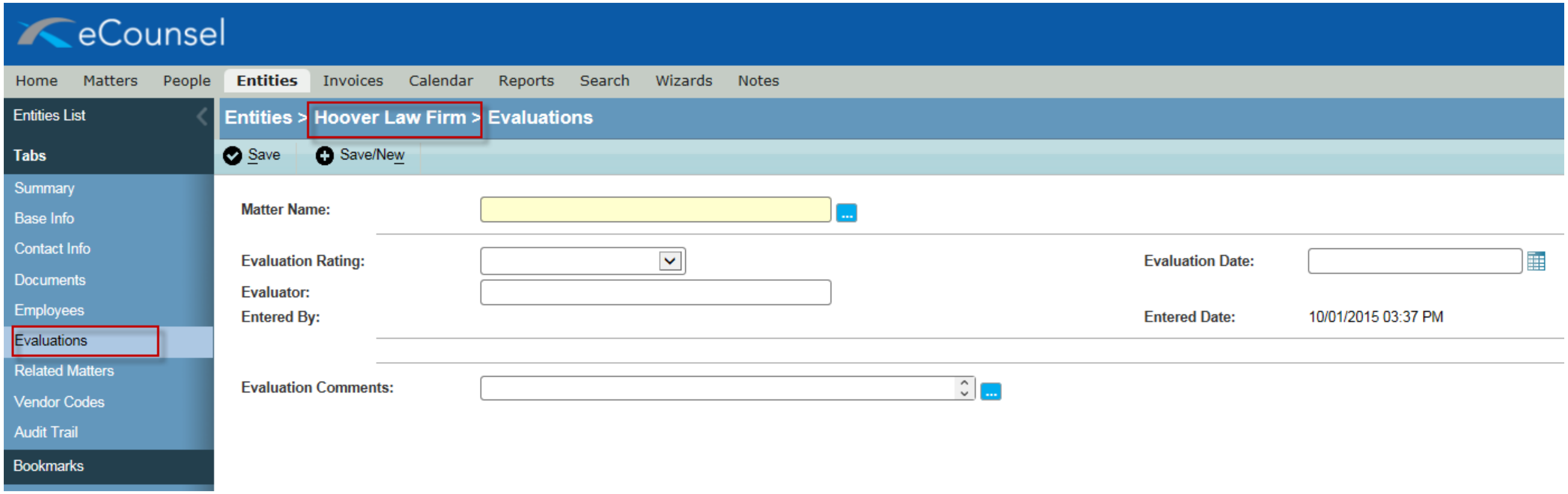
ENTITY DATA ENTRY

- Use Billing information tab to track Billing Information, Billing Guideline Compliance, and information about the number of Minority Firms being utilized within your organization



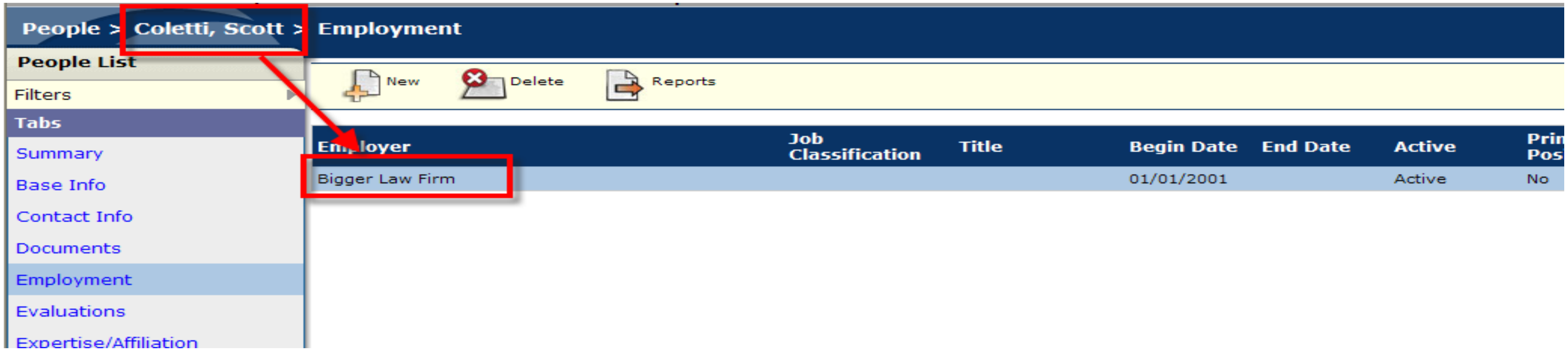
ENTITY DATA ENTRY

- Use the **Evaluations** Tab to track the ratings of a Player's work on a particular matter. Compliance with this will enable your users to share this information with your entire department to make future assignment decisions



PEOPLE DATA ENTRY

- Connect People to the Firms that work for, especially for electronic billing purposes.



PEOPLE DATA ENTRY

- Use the **Evaluations** Tab to track the ratings of a Player's work on a particular matter. Compliance with this will enable your users to share this information with your entire department to make future assignment decisions.

New Delete Reports

|< << | >> >| | Page Size: 25 Displaying 1 to 2 of 2 record(s) found

Matter Name	Evaluation Rating	Evaluation Date	Evaluator	Entered By	Entered Date
Financing Matter	1-Excellent	10/02/2008		Scott Coletti	10/02/2008 08:30 AM
Welfaer	2-Good	06/01/2008		Scott Coletti	10/02/2008 08:35 AM

PEOPLE DATA ENTRY

- Use **Expertise/Affiliation** Tab to track the areas of expertise of your Outside Counsel, Consultants, Experts and other vendors. Compliance with this will enable your users to share this information with your entire department to make future assignment decisions

New Delete Reports

|< << | >> >| | Page Size: 25 Displaying 1 to 3 of 3 record(s) found

Area/Organization	Type	Begin Date	End Date
Antitrust and Trade Regs	Expertise		
Bankruptcy	Expertise		
Commercial Law	Expertise		

INVOICE DATA ENTRY

- For manual data entry
  - Use the “T” button in any date field to populate with today’s date
  - Default the service start and end date based on the invoice date. Usually, it’s set to the month prior to the invoice date
  - Use the one page invoice data entry form
- Control what users can and cannot update. Segregation of duties is important, especially in electronic billing
  - Ensure that one user cannot create, update, approve and post an invoice if eCounsel is integrated with the AP system.
    - Do not let certain parts of the invoice be updated by approvers
    - Do not let non-approvers change approvers who exist on an invoice

OTHER

- When using invoice audit rules (IAR), be judicious. Don't overwhelm your users with warnings, your firms with rejections or your invoice administrator with warnings and rejections they don't understand.
  - Only enforce auditable elements of your billing guidelines.
  - Understand, clearly, your billing guidelines and how each warning and rejection should be handled.
- Continue to interact with the users proactively after rollout, after upgrade and after configuration changes are complete.
- Consider forming and leading an "eCounsel advisory committee" who meet on a periodic basis to discuss **successes**, issues, opportunities for improvement, needs/wants .
- Consider a formalized "Change Request Form" and accompanying process to make it easy for everyone to have a say in the configuration.
- During implementation or upgrade, set up a communication plan to let the users know "What's New", how the project is going to flow and the timeframes for completing them. Address any potential concerns in the communication but above all, accentuate the positive.
- Consider a "brown bag lunch" approach to training and demonstrate under-utilized features or reinforce the current processes. Sessions should be short and focused.

QUESTIONS

THANK YOU

PLEASE TAKE 5 MINUTES TO COMPLETE THE SESSION FEEDBACK FORM VIA THE MOBILE APP!