



Best Practices in eCounsel

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MEET YOUR PRESENTERS



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Best Practices in eCounsel

- 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.

- 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.

- 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”

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

- Design
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TOPICS

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

- 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

- 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)?

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

- 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

- Entities

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

Save Reports

Name:	Hanover Law Firm	Begin Date:	
Short Name:	Hanover Law Firm	End Date:	
Tax ID:		Administration Number:	
Classification:			
Approved	<input type="checkbox"/>	Approved Date:	
Internal:	<input type="checkbox"/>	Insurance Company	<input type="checkbox"/>
Active:	<input checked="" type="checkbox"/>	Track Billing Information	<input type="checkbox"/>
Rejected:	<input type="checkbox"/>		
Region:		Subtype:	

ENTITY DATA ENTRY

- Entities
 - Use the “Duplicate Check” feature

The screenshot displays the Entity Data Entry form with a yellow header bar containing 'Save', 'Reports', and 'Find Duplicates?' buttons. The 'Find Duplicates?' button is highlighted with a red box. A red arrow points from this button to a 'Duplicate Check - Windows Internet Explorer' dialog box. The dialog box shows a warning: '1 Possible Duplicate(s) Found!' and a table of duplicate records.

Name: Hanover Law Firm **Begin Date:**

Short Name: Hanover Law Firm **End Date:**

Tax ID:

Classification:

Approved:

Internal:

Active:

Rejected:

Region:

Entity Number:

Comments:

Duplicate Check - Windows Internet Explorer

http://127.0.0.1/suite810/hm/openwindow.htm?cmd=duplicatecheck&infoUrl=../servlet/com.t

1 Possible Duplicate(s) Found! Continue

The system has detected the following possible duplicate records. Please review them to determine if the record you are creating is already in the system.
Click hyperlink to cancel the new record and to open the selected record.
Click Continue to close this screen and continue adding the new record.

Name	Short Name	Tax ID	Active
Hanover Law Firm	Hanover Law Firm		Active

ENTITY DATA ENTRY

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



New Delete **Contacts** Reports

Select a contact record from another entity to be copied

Description	Type	Contact Info	Is Primary
Coletti, Scott	Business Address	123 Main Street, Phoenix, Arizona 85021	No
Coletti, Scott	Email	scott.coletti@bridge-way.com	Yes
Coletti, Scott	Cellular Phone	480-797-0132	Yes

Select Go Back Cancel

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

✓ Save 📄 Reports

Billing:

Billing Method:	<input type="text" value=""/>	Payment Method:	<input type="text" value=""/>
Account Code:	<input type="text" value=""/>		

Guidelines:

Guidelines Returned	<input type="checkbox"/>	Date Guidelines Returned:	<input type="text" value=""/>
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Miscellaneous:

Minority Firm	<input type="checkbox"/>	Female Ownership	<input type="checkbox"/>
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- 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

The screenshot displays the eCounsel web application interface. The top navigation bar includes 'Home', 'Matters', 'People', 'Entities', 'Invoices', 'Calendar', 'Reports', 'Search', 'Wizards', and 'Notes'. The 'Entities' tab is active, showing a breadcrumb trail: 'Entities > Hoover Law Firm > Evaluations'. The 'Evaluations' tab is highlighted in the left sidebar. The main content area contains a form with the following fields:

- Matter Name:** A text input field with a yellow background and a blue ellipsis icon.
- Evaluation Rating:** A dropdown menu.
- Evaluation Date:** A date picker field.
- Evaluator:** A text input field.
- Entered By:** A text input field.
- Entered Date:** A date field showing '10/01/2015 03:37 PM'.
- Evaluation Comments:** A text area with a blue ellipsis icon.

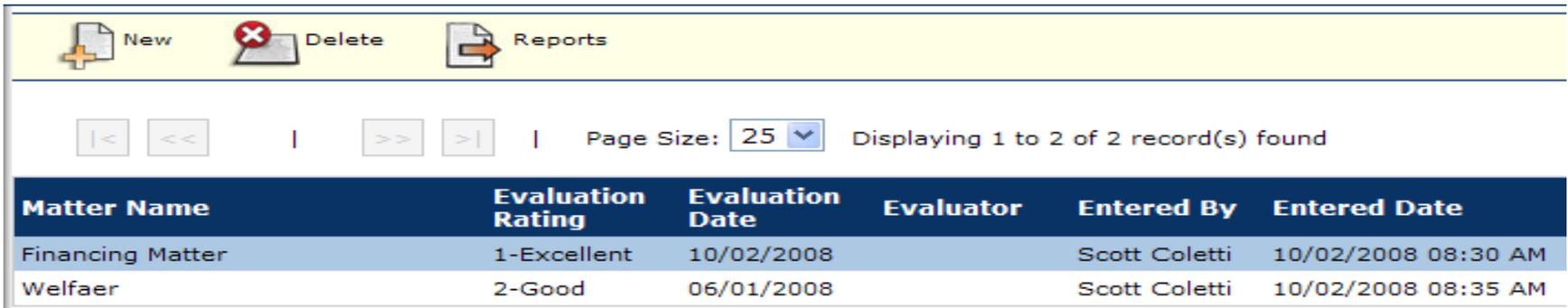
At the top of the form, there are two buttons: 'Save' (with a checkmark icon) and 'Save/New' (with a plus icon).

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

The screenshot shows a software interface for managing people data. The breadcrumb navigation at the top reads "People > Coletti, Scott > Employment". Below this is a "People List" section with a "Filters" area and a "New" button. A table displays employment records for "Coletti, Scott". The table has columns for "Employer", "Job Classification", "Title", "Begin Date", "End Date", "Active", and "Pri Pos". The first row shows "Bigger Law Firm" as the employer, with a "Begin Date" of "01/01/2001" and an "Active" status. A red box highlights the "Employer" column header and the "Bigger Law Firm" entry. A red arrow points from the "Coletti, Scott" breadcrumb to the "Employer" column header.

Employer	Job Classification	Title	Begin Date	End Date	Active	Pri Pos
Bigger Law Firm			01/01/2001		Active	No

- 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.



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



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

- 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

- 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!**