



# COOKING WITH TEAMCONNECT

Getting Value From Workflow Driven Configuration in TeamConnect

George Chiu, Director, Information Technology Group (ITG), Prudential Financial

Dan Braun, Senior Business Analyst, Mitrtech

Arnie Armadillo, Mascot, Mascots Ltd.

# MEET YOUR PRESENTERS

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Dan Braun, Mitratesch  
**Sr. Business Analyst**



George Chiu, Prudential  
Financial  
**Director, ITG**



Arnie Armadillo  
**Mascot**

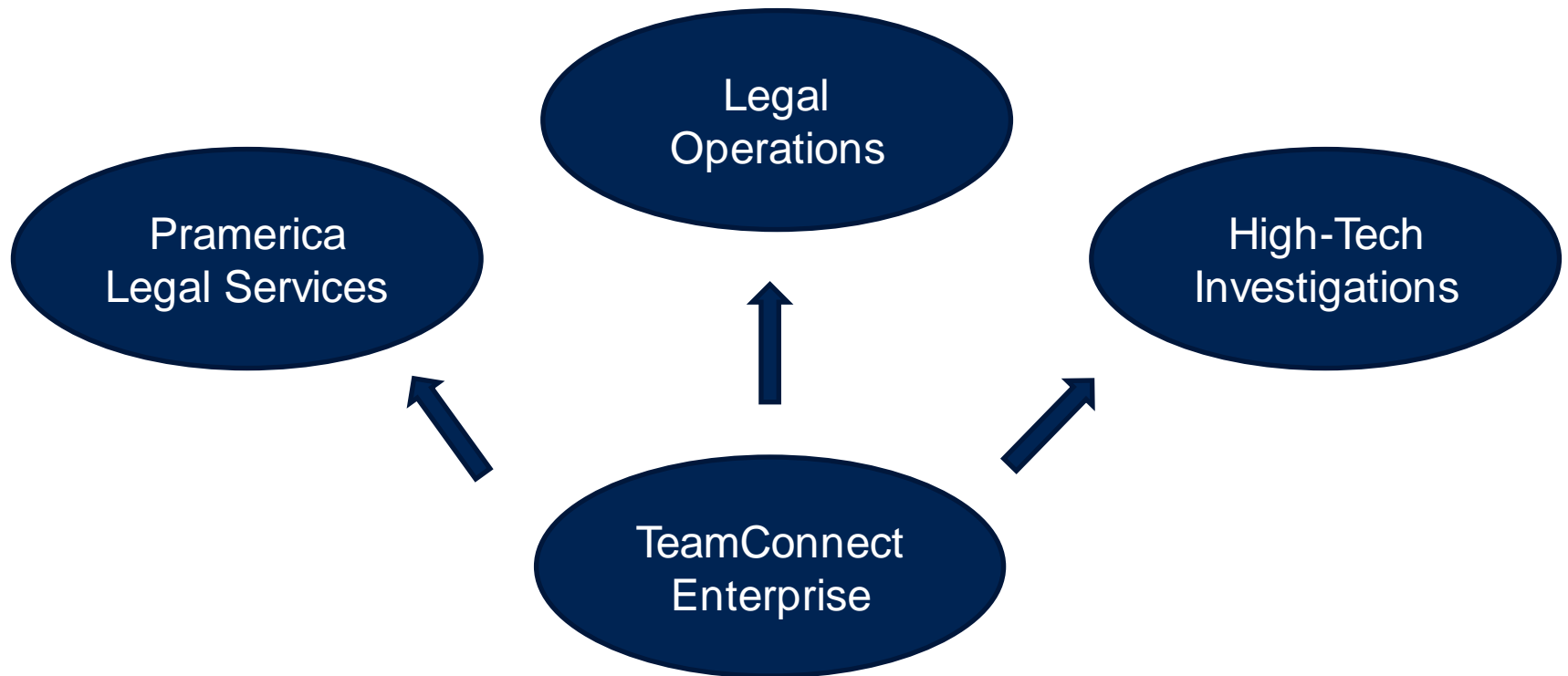
- Design Overview
- Law Services
- Legal Operations
- High-Tech Investigations Unit

# DESIGN OVERVIEW

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# GETTING WORK DONE BEYOND CORPORATE LEGAL

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# PRAMERICA LEGAL SERVICES

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# PRAMERICA LEGAL SERVICES PURPOSE

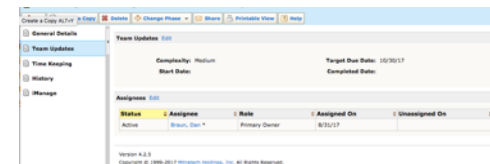
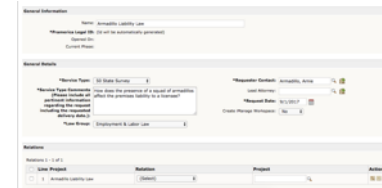
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Simple object with a defined workflow that allows Prudential attorneys to request legal research tasks from the Pramerica team

The Pramerica team is then able to manage the request in TeamConnect providing status updates and research results

# PRAMERICA LEGAL SERVICES WORKFLOW

1. Attorney submits request for legal research
2. Pramerica team manages the request
3. Pramerica management team oversees the process
4. Attorney can view status of request in TeamConnect
5. Request is completed and closed in TeamConnect





# ATTORNEY SUBMITS REQUEST FOR RESEARCH

**General Information**

Name:

**\*Pramerica Legal ID:** (Id will be automatically generated)



Opened On:



Current Phase:

---


**General Details**

**\*Service Type:**

**\*Requester Contact:**   

**Lead Attorney:**   

**\*Service Type Comments**  
(Please include all pertinent information regarding the request including the requested delivery date.):

**\*Request Date:**  




**\*Law Group:**

Create iManage Workspace:

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**Relations**

Relations 1 - 1 of 1

<input type="checkbox"/>	Line	Project	Relation	Project	Action
<input type="checkbox"/>	1	Armadillo Liability Law	<input type="text" value="(Select)"/>	<input type="text"/>	  

# MANAGING THE REQUEST

**Pramerica Legal - Pramerica Legal-2017-00646-Armadillo Liability Law** [Back to Pramerica Legal](#)

[Edit](#) [Create a Copy](#) [Delete](#) [Change Phase](#) [Share](#) [Printable View](#) [Help](#)

- General Details**
- Team Updates
- Time Keeping
- History
- iManage

**General Information** [Edit](#)

**Name:** Armadillo Liability Law  
**Pramerica Legal ID:** Pramerica Legal-2017-00646  
**Opened On:** 8/31/17 11:16 PM  
**Current Phase:** Open

**General Details** [Edit](#)

**Service Type:** 50 State Survey  
**Requester Contact:** [Armadillo, Arnie](#)

**Service Type Comments (Please include all pertinent information regarding the request including the requested delivery date.):** How does the presence of a squad of armadillos affect the premises liability to a licensee?  
**Lead Attorney:**  
**Request Date:** 9/1/17  
**Create iManage Workspace:** No

**Law Group:** [Employment & Labor Law](#)

**Relations** [Edit](#)

Project	Relation	Project
No relations available.		

# STATUS UPDATES AND CLOSING

Create a Copy ALT+Y   a Copy   Delete   Change Phase   Share   Printable View   Help

- General Details
- Team Updates**
- Time Keeping
- History
- iManage

**Team Updates** [Edit](#)

**Complexity:** Medium      **Target Due Date:** 10/30/17  
**Start Date:**      **Completed Date:**

**Assignees** [Edit](#)

Status	Assignee	Role	Assigned On	Unassigned On
Active	Braun, Dan *	Primary Owner	8/31/17	

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# LEGAL OPERATIONS PURPOSE

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Consolidates legal department operations requests in a tool with which attorneys are already familiar

Represents 10+ legal operations request types including facilities and IT requests

1. User submits request
2. Legal Operations team begins review and working the request
3. Communicate request updates and information in TeamConnect
4. Submit for necessary approvals
5. Complete request

# LEGAL OPERATIONS REQUEST SUBMISSION

General - Step 1 of 2 Cancel Next

**1. General**  
2. Details

**General Information**

Name: auto  
**\*1StopOps ID:** (Id will be automatically generated)  
Opened On:  
Current Phase:

**General Details**

**\*Submitting this request on behalf of someone else?:**

**\*Requestor Name:**

My X-ID:  
My Phone #:  
My Email Address:

Location:   
Jack #:   
Column #:   
Computer Name:

**\*Business Justification:**

Priority:

If you like to attach any supporting documents, please submit the request first.  
Haste status on requests submitted before 3pm guarantees a response from an Operations associate within the same day, this is not the completion time of the request.

# LEGAL OPERATIONS REQUEST SUBMISSION

### Badge Request

Details - Step 2 of 2

Cancel Back Finish

- 1. General
- 2. Details

#### Badge Request

Building: (Select)

Floor:

Access Type: (Select)

Mirrored Name:

Secure Area:

**\*Required fields are noted by an asterisk**

**1StopOps - 1StopOps - 2017 - 000142-Badge Request** [Back to 1StopOp](#)

[Edit](#) [Create a Copy](#) [Delete](#) [Change Phase](#) [Share](#) [Printable View](#) [Help](#)

- General**
- Details
- Correspondence
- Manager Checklist

**General Information** [Edit](#)

**Name:** Badge Request  
**1StopOps ID:** 1StopOps - 2017 - 000142  
**Opened On:** 8/31/17 11:46 PM  
**Current Phase:** Open

**General Details** [Edit](#)

<b>Contact Name:</b> Braun, Daniel	<b>Location:</b> Armadillo Alley
<b>Submitting this request on behalf of someone else?:</b> No	<b>Jack #:</b>
<b>Requestor Name:</b> Braun, Daniel	<b>Column #:</b>
<b>My X-ID:</b>	<b>Computer Name:</b>
<b>My Phone #:</b>	<b>Business Justification:</b> Armadillo Access
<b>My Email Address:</b>	<b>Priority:</b>

If you like to attach any supporting documents, please submit the request first.  
Haste status on requests submitted before 3pm guarantees a response from an Operations associate within the same day, this is not the completion time of the request.

**Business** [Edit](#)

**Business Group:**  
**Cost Center/Dept Name/Dept ID:**

**Documents**

**Location:** [Attachments](#)

[New](#) [Refresh](#) [Print](#) [Close](#) [Home](#) [Back](#) [Forward](#)



# LEGAL OPERATIONS CORRESPONDENCE

Edit Create a Copy Delete Change Phase Share Printable View Help

General  
 Details  
 Correspondence  
 Manager Checklist

**Correspondence**

New

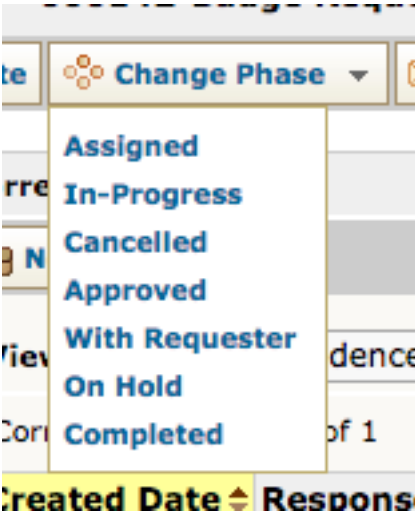
View: All Correspondence Sort Show Filter

Correspondence 1 - 1 of 1

Created Date	Response/Inquiry	Sender	Message
8/31/17 11:49 PM	Query to Client	Braun, Daniel	What is an armadillo?

Correspondence per page: 50

# APPROVAL AND CLOSING



# HIGH-TECH INVESTIGATIONS UNIT

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# HTIU PURPOSE

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A consolidated location to track eDiscovery and internal investigation requests

Allows for easy investigation tracking and reporting

## Standard Process

1. Case request from eDiscovery / Internal Investigation
2. Work the case file adding case details
3. Manage case process
4. Request for case closure
5. HTIU manager approves closer
6. Case closed

## From Resilient Integration


1. SCOC identifies possible threat
2. Threat escalates to HTIU
3. When approved in Resilient, HTIU case is created in TeamConnect
4. Follow Standard Process


# HTIU CASE REQUEST AND CREATION

Investigation Details - Step 1 of 3 Cancel Next




**1. Investigation Details**  
2. Assign a Manager Only  
3. Assign an Investigator and Manager


**Subjects**

**\*Primary Subject:**    
Role of Primary Subject:   
Primary Subject Business Unit:

**SecondarySubject:**    
Role of Secondary Subject:   
Secondary Subject Business Unit:

**Incident Details**

**\*Date of Incident:**    
**\*Date Reported:**    
Date Recorded:    
Days Open:

Reported By:    
Reported By Business Unit:   
Incident Country:

**Investigation Details Wizard**

Case Description:

Source Matter ID:   
Case Source:

**Investigation - HT-2017-000270-Armadillo, Arnie-External Fraud-Intellectual Property Violations** [Back to Investigations](#)

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- General
- Categories
- Involved Parties
- Interviews
- iManage Docs
- Narratives
- Relations
- Evidence
- Resilient
- Workflow
- TBD
- Template

**General Information** [Edit](#)

**Name:** Armadillo, Arnie-External Fraud-Intellectual Property Violations  
**Investigation ID:** HT-2017-000270  
**Parent Project:**  
**Opened On:** 9/1/17 12:03 AM  
**Current Phase:** Open

**Incident Details** [Edit](#)

**Date of Incident:** 8/15/17  
**Date Reported:** 9/8/17  
**Date Recorded:**  
**Days Open:**

**Reported By:**  
**Reported By Business Unit:**  
**Incident Country:** United States  
**Incident State:**

**Investigation Details** [Edit](#)

**Source Matter ID:**  
**Case Source:**  
**Total Days Open:**  
**Status Reporting Client:**

**Significant:** No  
**iManageTemplateDI:** TeamConnect Investigation - HT  
**Claim Number:**  
**Case Description Memo:**

**Investigation Type** [Edit](#)

Click to go forward, hold to see history [Back to Investigations](#)

[Edit](#) [Create a Copy](#) [Delete](#) [Change Phase](#) [Share](#) [Printable View](#) [Help](#)

- General
- Categories
- Involved Parties
- Interviews**
- iManage Docs
- Narratives
- Relations
- Evidence
- Resilient
- Workflow
- TBD
- Template

### Interviews

[New](#)

View: All Interviews [Sort](#) [Show Filter](#)

Interview 0 - 0 of 0

Interview	Interview Date	Interviewer	Interviewee
No projects available.			

Interview per page: 50

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# QUESTIONS

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# THANK YOU

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

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George Chiu, [george.chiu@prudential.com](mailto:george.chiu@prudential.com)