CONFERENCE SESSIONS: Secretariat

What's New (and Coming) in Secretariat Version 8
Our Product Planning team will present an overview of the new features that are available in Versions 8.2 and 8.3 and what's coming in Version 8.4. Also, a discussion is included for what is involved in the migration process for those who are currently using Version 7.

Best Practices in Secretariat: Chesapeake Energy
Anita Brodrick, a long-time Secretariat client, from Chesapeake Energy will team with our experienced Implementation Consultant to review best practices for using the software as well as business processes. Together, they will detail how you can use Bridgeway offerings to maximize your efficiency. Bring your own tips, and hear others' lessons learned.

Get Your Users to Quit Calling You and Use the Software!
For the Secretariat administrator, this session details how to set up a more user-friendly interface to minimize training needs, train your users on more complicated functions, and configure the system so that only necessary components are available. This interactive session allows clients to discuss their biggest challenges and see how others have succeeded in similar situations.

Bridgeway Reporting Options
Secretariat includes several reporting options—Advanced Search, Analysis Center, and Crystal Reports—to help your users access your data. This session will provide an overview of these options, when to use each one, and outline the technical expertise needed for each.

Find…Instead of Search
This session helps you understand the data and how it is organized in the system from a high-level to better facilitate finding your data. Learn how to use filters on list pages to display the records you need on the page, then how to customize grids to view your data at a glance. Explore the advantages of advanced searching by learning how to build search expressions that retrieve meaningful results, create reusable searches and results templates, and determine the best way to display results.

Effectively Managing the Bridgeway BusinessObjects™ Integration
BusinessObjects™ is a powerful reporting solution that works with Secretariat to provide unmatched data retrieval capability. This session explores how to effectively manage the Bridgeway BusinessObjects™ integrated environment to ensure maximum effectiveness of the reporting solution. Included is an overview of the components necessary for the integration, configuration of the integration, basic use of the consoles and managers in BusinessObjects™, import/export of BusinessObjects™ resources, and modification of the Analysis Center universe.

Analysis Center: The Next Level of Ad Hoc Reporting
This session provides a detailed look into what you can do with Bridgeway's premier ad hoc reporting tool, including an overview of what ad hoc reporting really means, creating quick and simple reports, and manipulating data real-time using sorting and filtering. For those who want to go deeper, complex reporting is discussed, including using prompts in saved queries, adding data from multiple modules, drilling down into data, and adding graphs and charts. The limitations of the "ad hoc" paradigm are discussed in relation to the improvements we are making with the integration. Let us help you determine if you are ready to take your ad hoc reporting to the next level.

CONFERENCE SESSIONS: Secretariat (CONT.)

Extending Secretariat
In this session, we will show you how to leverage of the power of your data through tools such as the following:

- Learn how to create and manage your organizational charts using CorpCharts.
- Learn how to configure access to your Secretariat data through SuperViewer.
- Learn how to classify information using WorldView to make data more secure.
- Learn how to get results with Analysis Center.

Using HotDocs® with Secretariat
One of the features Secretariat offers is the ability to use HotDocs® templates to retrieve data from Secretariat records to create corporate documents such as Consents, Notices, and Certificates. In this session, we will show you how to edit standard Secretariat HotDocs templates provided by Bridgeway and customize these templates for your company.

CONFERENCE SESSIONS: eCounsel

Going Global with eCounsel
There are both technical and process challenges around implementing eCounsel internationally. Using specific client examples, Huron will be discussing how to overcome those challenges .   using specific client examples. Some of those challenges include: Internet accessibility, multiple instances of SAP, training in many disparate locations, and language barriers.

Leveraging Your Matter Management System for Medicare Reporting Requirements - Featuring June Consulting
Successful compliance requires implementing a repeatable process that guarantees all reporting is done completely and in a timely manner. The Medicare, Medicaid and SCHIP Extension Act of 2007 (MMSEA) set forth reporting requirements for applicable claims. Learn how to leverage your Matter Management system to help you cope with the burden of the new Medicare reporting requirements. June Consulting will share how they have helped major companies meet the compliance challenges of the Medicare Reporting Act.

What's New (and coming) in eCounsel Version 8
This session is designed for clients who are already familiar with Version 8. Our Product Planning team will present an overview of the new features that are available in Versions 8.2 and 8.3 and what's coming in Version 8.4.

Migrating to eCounsel Version 8?
This session is designed for Version 7 users. Come see the Version 8 interface and the benefits of the features in Versions 8.2 and 8.3 and what is coming in 8.4. Also, a discussion is included for what is involved in the migration process.

Best Practices in eCounsel
This session combines an overview of expert tips in using the software with advice from our Implementation Consultants and Support on successful implementation and roadblocks to avoid to keep eCounsel running smoothly and efficiently. Bring your own tips, and come to hear others' lessons learned.

CONFERENCE SESSIONS: eCounsel (CONT.)

Get Your Users to Quit Calling You and Use the Software!
For the eCounsel administrator, this session details how to set up a more user-friendly interface to minimize training needs, train your users on more complicated functions, and configure the system so that only necessary components are available. This interactive session allows clients to discuss their biggest challenges and see how others have approached similar situations.

Spreadsheets to eCounsel and Beyond: T-Mobile's Experience
Come hear T-Mobile's experience in moving its billing and workload onto eCounsel from internal adoption, outside counsel on-boarding, and reporting using Crystal Reports. This session will help you see how other companies are solving their problems using eCounsel!

Driving Efficiency & Savings with Meaningful Metrics: Dynegy's Experience
In this session, Dynegy will share both innovative outside counsel management strategies and how Dynegy uses its eBilling data to identify and enforce savings opportunities. This session will help you see how other companies are solving their problems using eCounsel!

Thinking Outside the Box: Leveraging eCounsel Beyond Matter Management
Ever wondered how you can use eCounsel beyond matter management? We will discuss how clients have done just that! From a Human Resources department that tracks hotline issues that may eventually lead to litigation to a retail company that uses eCounsel to track their retail stores, learn how you can get more from your investment.

Round Table: Smart Invoice™
This interactive session allows clients to share best practices for using the software as well as business processes. Bring your own tips, and hear others' lessons learned.

Ensuring Successful Invoice Submissions
We will put the power of control back in your hands by equipping you to work with your law firms to ensure successful invoice submission. This session includes information on administering Smart Invoice (setting up and maintaining vendor information), understanding LEDES files, understanding the requirements for a successful import of a LEDES file, working with audit and validation rules, and identifying text formatting and special characters that spell trouble. In addition, learn how to read, understand, and apply error messages for quick resolutions.

Practical Approach to Applying Rules
Our Implementation Consultants will share the practical approach to applying rules that work for your organization and techniques for evaluating situation that may need rules, setting up rules, understanding rule options/capabilities, and supporting the rules you have in place. In addition, this session will help you gain insight into balancing rules and usability.

Invoice Audit Rules for eCounsel
This session focuses on the pros and cons of using invoice audit rules, including a review of the standard invoice audit rule library provided by Bridgeway. Learn how to install and configure rules, and hear descriptions of the most popular rules with a review of the functionality for each.

Bridgeway Reporting Options
eCounsel includes several reporting options—Advanced Search, Analysis Center, and Crystal Reports—to help your users access your data. This session will provide an overview of these options, when to use each one, and outline the technical expertise needed for each.

CONFERENCE SESSIONS: eCounsel (CONT.)

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This session provides a detailed look into what you can do with Bridgeway's premier ad hoc reporting tool, including an overview of what ad hoc reporting really means, creating quick and simple reports, and manipulating data real-time using sorting and filtering. For those who want to go deeper, complex reporting is discussed, including using prompts in saved queries, adding data from multiple modules, drilling down into data, and adding graphs and charts. The limitations of the "ad hoc" paradigm are discussed in relation to the improvements we are making with the integration. Let us help you determine if you are ready to take your ad hoc reporting to the next level.

eCounsel Outputs: How T-Mobile uses Search, Analysis Center, Crystal Reports, and Excel
Different requirements for information need different tools. See what T-Mobile does to extract, analyze, and display information from eCounsel, and how they use various tools to create reports, unique dashboards, and custom queries for various users.

CONFERENCE SESSIONS: LawManager

Leveraging Your Matter Management System for Medicare Reporting Requirements - Featuring June Consulting
Successful compliance requires implementing a repeatable process that guarantees all reporting is done completely and in a timely manner. The Medicare, Medicaid and SCHIP Extension Act of 2007 (MMSEA) set forth reporting requirements for applicable claims. Learn how to leverage your Matter Management system to help you cope with the burden of the new Medicare reporting requirements. June Consulting will share how they have helped major companies meet the compliance challenges of the Medicare Reporting Act.

Litigation Support … From Matter Tracking to e-Discovery – Featuring New York City Law Department
Teressa Barillas, Director of Litigation Support at the New York City Law Department will discuss how the Law Department uses LawManager and how the Law Department manages its e-discovery processes.

Four years post-implementation, the Law Department's use of its LawManager application has grown with the agency's changing needs. The Law Department has over 1,400 internal and remote users and interfaces with 17 other systems. Teressa will demo the Law Department application and discuss the most recent challenge of setting up systems and processes for compliance with a new Federal Medicare mandate. On the e-discovery front, the Law Department's Litigation Support Division is 3 years old. Teressa will discuss how the Law Department supports its case teams, interfaces w/ client agencies, collects data and uses a variety of in-house and hosted review tools and applications and what still needs to be done to manage the e-discovery process.

CONFERENCE SESSIONS: LawManager (CONT.)

What's New (and Coming) in LawManager V6

Come see the new LawManager Version 6 release and learn what's involved in upgrading. This session includes a demonstration and overview of the enhancements to the product:

- LawManager Web Version 6 has many new features including multi-record tabular editing, graphical calendars, simultaneous main section and tab data entry, faster group bys, PDF format for Report Wizard, and many others.
- LawManager Pro Version 6 now has global searching, "AND" searching in the main section, and Report Wizard improvements.

Also included is a "sneak" preview of some new features that are planned, including the new Portal and Notebook summary views.

LawManager Integrations

LawManager has various standard integrations including Document Management Systems, Bridgeway Legal Hold, Outlook/Exchange, and soon, Corridor eBilling. This session will demonstrate these various interfaces, explain how they work, and describe the benefits they give your users.

LawManager Advanced Reporting

LawManager has multiple reporting options including the Report Wizard and Business Objects, which includes Crystal Reports, Web Intelligence, and Xcelsius Dashboards. This session will teach you how to:

- Configure calculated fields so users can create more meaningful reports with the Report Wizard.
- Use LawManager's utility to create a BusinessObjects™ Universe.
- Use Web Intelligence with a LawManager Universe to more easily create powerful graphical reports.
- Develop advanced dashboard reports using Business Objects Xcelsius.
- Use the new saved reports mechanism in LawManager 6 to save and administer reports for all users, a group of users, or a select set of users.

Using LawManager for Risk and Compliance

This session will introduce Bridgeway's new Governance, Risk, and Compliance (GRC) foundation set of notebooks that allow an organization to create solutions for their Risk and Compliance departments. Included is information on adding the new GRC notebooks to an existing LawManager configuration and examples of how LawManager clients have used LawManager for Risk and Compliance management.

CONFERENCE SESSIONS: eDiscovery

NEW

Managing eDiscovery In-House - Chrysler's Experience

For many companies, the thought of bringing the entire electronic discovery process in-house is only a fantasy. Chrysler made the commitment to do just that several years ago, and today are using Bridgeway eDiscovery as the technology to support the process. Come hear Chris Jones of Chrysler speak to the reasons Chrysler made the decision to bring it in-house, what they expected to achieve, their criteria and search for the right electronic discovery solution, what they are able to accomplish today, and their future challenges and expectations.

Bringing eDiscovery In-house

It's a fact! Corporations are taking more control of the electronic discovery process by bringing eDiscovery in-house. This session, which will provide an overview of how to bring eDiscovery in-house (focusing on cost justification, staffing requirements, and best practices), provides a roadmap toward building an internal eDiscovery process using Bridgeway's eDiscovery Suite to create an end-to-end solution.

CONFERENCE SESSIONS: eDiscovery (CONT.)

Bridgeway Legal Hold: Getting the Message!
When the duty to preserve has arisen, can you quickly distribute a legal hold notice and manage all of the responses through a single application? Most corporations still manage preservation notices with spreadsheets and e-mail. What about tracking interviews and collections? Bridgeway Legal Hold has you covered! As a special treat for existing eCounsel and LawManager clients, see how Bridgeway Legal Hold integrates directly with matter management. Stop by and see what all the excitement is about!

Bridgeway Legal Hold Integration with LawManager
A consistent, auditable legal hold process is key to reducing the risk of sanctions. Bridgeway's new Legal Hold product works with LawManager and eCounsel to assist corporate legal departments with generating, distributing, and tracking preservation notices. In addition, it provides the ability to track interviews and capture results of interviews, and it supports the process to collect the discoverable data. Come see how to manage preservation notices, interviews, and collections more cost-effectively than ever before.

CONFERENCE SESSIONS: IT

Exploring Widgets
Ever wonder if you could do more with your home page in Version 8? What about some of those things called widgets? This session will explore capabilities to enhance your overall Suite experience. Explore the possibilities of embedded content, RSS feeds, and custom widgets to design an awesome user experience and enhance the functionality of your existing system.

Taking Control with SmartLink: Dow Chemical & Abbott Laboratories
The SmartLink Appliance offers Bridgeway clients the ability to manage their own environments by simplifying database integrations and providing the power to build business rules. Learn how Dow Chemical's Jeremy Scott and Chad Andrews and Abbott Laboratories' Robert Cassiere gained efficiencies from using SmartLink with Bridgeway products.

Get Your Users to Quit Calling You and Use the eCounsel Software!
This session details how to set up a more user-friendly interface to minimize training needs, train your users on more complicated functions, and configure the system so that only necessary components are available. This interactive session allows clients to discuss their biggest challenges and see how others have approached similar situations.

Get Your Users to Quit Calling You and Use the Secretariat Software!
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CONFERENCE SESSIONS: IT (CONT.)

Practical Approach to Applying Rules
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Bridgeway Reporting Options
Bridgeway Suite includes several reporting options—Advanced Search, Analysis Center, and Crystal Reports—to help your users access your data. This session will provide an overview of these options, when to use each one, and outline the technical expertise needed for each.

Managing Updates to the Bridgeway Suite Application
Using Bridgeway's new Update Manager, you can track available update releases for your Bridgeway applications, pick and choose which updates are installed in Development and Production, be informed of new releases automatically via RSS Feed, and empower your IT Staff with a confident upgrade path. Learn how to take the guesswork out of "online" and "offline" Bridgeway Web application archives with Update Manager.

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System Security for Bridgeway Suite
Become informed about all aspects of system security features of Secretariat and eCounsel. In this session, explore a few security paradigms. Our experienced Implementation Consultant will provide the best practices to evaluate which one fits your needs and how to modify it to provide the best system security for your company.

Troubleshooting Bridgeway Suite Version 8
Better management of the Bridgeway Suite software application can enhance your ability to self-diagnose and address issues as they occur, putting the power of control back in your hands! Learn what application components make up Bridgeway Suite and where the components are located, gain insight into the Rules Engine and Task Scheduler, and learn where log files are located and how to interpret them. In addition, Bridgeway will share resolutions to common issues and the basics of debugging.

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CONFERENCE SESSIONS: SOMETHING FOR EVERYONE

Litigation Support … From Matter Tracking to e-Discovery – Featuring New York City Law Department
Teressa Barillas, Director of Litigation Support at the New York City Law Department will discuss how the Law Department uses LawManager and how the Law Department manages its e-discovery processes.

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Getting Things Done
This session on personal productivity is based on the national bestseller by David Allen, *Getting Things Done: The Art of Stress-Free Productivity.* You will discover David Allen's powerful methods and vastly increase your personal organization, efficiency, and creative results—at work and in life.

Disney's Approach to Quality Service
The long-standing reputation *Disney Destinations* has established for incredible service and friendly employees is not magic, it is sound ideology consistently applied in business. This program is designed to help you improve your organization's quality service by immersing you in the successful Disney model. *Disney Institute* will show you the importance of attention to detail and how they train their Cast Members (employees) to treat Guests (customers) as VIPs. Discover how to match your organization's service standards with successful delivery systems that consistently promote and ensure quality service.

Inspiring Creativity
In today's rapidly changing business climate, organizational success is more dependent than ever on creativity and innovation. Tapping the wellspring of employee creativity is a hallmark at Disney and the primary driver behind its continued success. Gain insight into ways to develop and foster a creative culture. Stimulate the creative resources of your human resources and inspire employees to "dream it and do it," turning ideas and concepts into profitable products and services. In this session, you will learn how to adapt proven Disney concepts and practices for optimizing creativity, employ techniques for developing a collaborative culture within your organization, and improve business results through effective internal structures.

Mutually Beneficial Alternative Fee Arrangements
For many years corporate legal has been frustrated with the billable hour and held out hope for alternative mechanisms for budgeting work with firms. With few exceptions however, the billable hour has held sway. Whether now a function of a stressful economic climate or new tools and data by which to construct alternatives, in-house counsel has become increasingly interested in alternative fee arrangements (AFAs). Guided by Jeff Hodge from Hildebrandt Baker Robbins, this session will look at the trend and some notable initiatives by some very large in -house departments, how they and others have rationalized and constructed AFAs and finally how AFAs can and should be mutually beneficial for both client and firm.

Current and Future Collaboration Trends for Law Department and Law Firms
This session will look at the future of collaborative efforts between the consumer and the supplier of law firm services to discuss how the balance of work is shifting between law departments, their corporate support services, and the law firm. In many cases, it is the opportunity to analyze, share and re-use law firm work that provides both the greatest benefits and the most concrete opportunities for successful collaborative efforts. David Rohde from Hildebrandt Baker Robbins will share his insight and bring a practical perspective to this session.

CONFERENCE SESSIONS: SOMETHING FOR EVERYONE (CONT.)

Top 5 Technology Trends for Law Departments

The Law Department of 2015 will be using technology differently than today. Over the last several years, we have seen the advent of search engines, portals, social media, matter-centric computing and other forms of technology that promote improvements in knowledge sharing, process efficiency and collaboration while reducing the costs of legal spend. This session will provide a "crystal ball" into the future of technology within law departments and how these changes will impact the relationships among in-house counsel, clients and vendors. Scott Rosenberg and Michael Stetzer from Huron Consulting Group will share their vision and case studies as to what lies ahead.