

# Multi-Campus University System Unifies Matter Management, e-Billing

## CHALLENGE

A large and complex statewide university system sought to better manage and track its legal costs and was unable to provide a common matter repository to legal staff at its many campuses through its centralized, on-premises system.

## SOLUTION

Under the university's One OGC program, the General Counsel's office has deployed Bridgeway Software's eCounsel solution for web-based matter management and e-billing, custom configured and available to counsel at all of the system's campuses, medical centers and labs.

## RESULTS

- Common, cloud-based matter management solution for all lawyers and staff serving the university and its campuses
- Tight integration between e-billing and matters
- Better insights into how the university and each campus spends legal budgets
- Simple process for charging legal fees and expenses back to the campuses that incurred them
- Better control of invoices, faster payment and closer alignment of cost accounting with matters
- Instant reporting, for attorneys and for rollup reports for the GC, trustees and regents
- Tight integration between matter and document management systems



## Bridgeway's eCounsel® Provides a Single Cloud Solution for Matters, e-Billing and Reporting

The law department of a modern university must deal with employment, compliance, real estate, development, intellectual property and financing issues, and will be involved in its share of litigation. Universities must educate a diverse student population, while producing world class research and partnering with industry to commercialize their discoveries. Their operations are under growing public scrutiny. Tuition and financial aid policies, faculty hiring and tenure policies are often challenged.

These issues are magnified when the institution is a state university system with 10 campuses, five medical centers and two research labs. In late 2013, the Office of the General Counsel for one such system was struggling to bring campus counsel at all of its facilities together under one shared matter management and e-billing solution, part of a broad program of resource sharing called **"One OGC."**

The GC found it challenging to get timely reporting on how the university was spending its legal budget. "We had to unify three or more data sources to produce reports so we could understand how much of our expenditures were fees and how much were expenses," the university's Chief Manager for Legal Information Services recalls. "For a range of billed matters, all we got were canned reports – there was no way to drill into them. Producing reports on the legal spend for different practice areas was time-consuming and difficult."

## One Solution for “One OGC”

The university partnered with Bridgeway Software to establish, for the first time, a system-wide matter management solution. Bridgeway’s eCounsel, a cloud-based matter management tool, now serves about 175 users, including 103 centralized OGC attorneys and staff, and enables campus counsel and staff to access the system remotely for the first time.

Bridgeway’s professional services team tightly integrated eCounsel with the OGC’s legacy document management system (NetDocuments®). And eCounsel included a powerful, integrated e-billing system that simplifies the processing and timely payment of outside counsel invoices. OGC administrators can easily see how legal costs are distributed, link them back to the relevant matters, and charge expenses back to the campuses that generated them. Now, attorneys can see spending against their budgets; the OGC can understand how legal funds are being spent, and can easily generate roll-up reports required by trustees and the state regents.

Staff and attorneys use productivity tools to streamline many of the activities of their jobs:

- Follow dates – Lawyers and administrators can track and automate alerts on critical dates.
- Manage workloads – Legal managers can review staff workloads and make adjustments as needed.
- Document management – eCounsel is tightly integrated (single sign-in) with a third party document management system (NetDocuments®). Opening a new matter generates a Document Workspace for Records, pending staff approval.
- Workflow - Administrators can establish sophisticated workflows that keep staff informed and updated and drive business processes. For example, the Records team reviews and approves all new matters created by staff in eCounsel before documents can be created.
- Reporting – With ad-hoc searching and reporting tools, users can access relevant data rapidly and generate reports as needed.

## Close Integration...Remote Access

eCounsel is the backbone of the university’s legal management solution. Users see a NetDocuments tab in eCounsel that runs an automatic search and displays a list of the documents with the matter number matching the matter that is currently open. New efficiencies and process enhancements include:

- Customization – eCounsel is easily modified to the university’s specific needs, e.g., screen design, field labels and matter classifications.
- Visibility into legal work across multiple campuses – from a single cloud solution.
- Control over matter proliferation – Attorneys and paralegals can create their own matters, but OGC Records staff review and approve them before documents can be created, reducing trivial or redundant matters.
- Fewer calls and emails within and between offices regarding the status of cases.
- Effective use of the legal budget – attorneys always know when spending is approaching a budget threshold.
- Extensibility – The OGC is responsible for reporting on the Patent Prosecution team’s outside counsel spend, and may provide eCounsel access to that separate team...as well as staff handling complex immigration matters for foreign faculty.

*The OGC has gathered a team of informational technology and financial professionals under its own organization, including the Records team, law library, dedicated IT Operations and development staff. OGC is self-sufficient in report design and generation, and maintains its own relationships with Bridgeway and other vendors, separate from enterprise IT. When changes and enhancements are required, university OGC will be prepared to manage the project – and its future as a shared service provider to campuses across the state.*