

LEGAL OPS CLINIC – ADVANCED

THOMSON REUTERS LEGAL TRACKER

2020 • Agenda

DAY 1		
9:00 – 9:30 AM	Introductions	Introductions and Clinic Overview
9:30 – 11:00 AM	System Setup	Essential Configuration Analysis: Is my system setup correctly? - Organizational Units, Practice Groups, Substantive Law, Templates, Invoice Approval Routes, AP Routes
11:00 – 11:15 AM	Break	
11:15 – 12:30 PM	Matters	Matters = Backbone of Tracker: Am I collecting the right information in the right way? - Templates, Custom Fields, Conditional Logic, Intake Examples
12:30 – 1:30 PM	Lunch	
1:30 – 3:00 PM	Invoicing	Approving and Paying: Are my processes efficient? Is inefficiency costing us money? - Approval Route Analysis and Modification, Auditing, Approval Analysis and Analytics/Reports, AP Routes, Accounting Codes, Vendor IDs
3:00 – 3:15 PM	Break	
3:15 – 4:30 PM	TKRR	Centralizing Rates: Should I use this? Am I using it correctly? - Enabling, Updating Rates, Quick Reports, Custom Email Templates, Troubleshooting Audits

DAY 2		
9:00 – 11:00 AM	Financials pt. 1	Budgets & Accruals: What are the best practices for collecting, auditing, and reporting? - Budget Types (CO, LF) Reforecasting, Accrual Functionality, Requirements, Pre-Configured and Custom Reporting
11:00 – 11:15 AM	Break	
11:15 – 12:30 PM	Financials pt. 2	AFAs and Task Codes: How can I take budgeting to the next level? - Task Codes, Task Code Alerts, Firm Portfolios, Volume Discounts
12:30 – 1:30 PM	Lunch	
1:30 – 4:00 PM	Reporting	Everything Reporting: Which reports should I be running? What do they mean? - Quick 101 Review, Advanced Filters and Examples, Review Current Reports,
4:00 – 4:30 PM	Conclusion	Next Steps: What happens now? - Questions, Policy Discussions, Optimization Plan