

LEGAL OPS CLINIC – BASIC

THOMSON REUTERS LEGAL TRACKER

2020 • Agenda

DAY 1		
9:00 – 9:30 AM	Introductions	Introductions and Legal Ops Clinic overview
9:30 – 10:30 AM	Users & Firms	Review basics of Users and Firms: Users, Company and Firm Profiles, System Roles, Matter Roles, Special Matter Access, Dashboard Access, Preferences
10:30 – 10:45 AM	Break	
10:45 – 12:00 PM	Tracker Basics	Revisit Basic Matter Functionality: Matter Creation, Management, and Closure; Bulk Updating
12:00 – 12:45 PM	Lunch	
12:45 – 2:00 PM	<u>System Setup: Essential pt. 1</u>	Review Critical Setup items: Organizational Units, Practice Groups, Substantive Law, Matter Type Templates, All Matter Fields, Conditional Logic, Custom Fields
2:00 – 2:15 PM	Break	
2:15 – 3:30 PM	<u>System Setup: Essential pt. 2</u>	Review Financial Setup items: Invoice Approval Routes, Invoice Approval Process, Invoice Auditing Options
3:30 – 4:00 PM	<u>System Setup: Non-Essential</u>	Review Non-Essential Setup items: Miscellaneous Matter Options, Miscellaneous Financial Options, HelpSite, Custom Email Templates
DAY 2		
9:00 – 10:30 AM	<u>System Setup: Essential pt. 3</u>	Review Financial Setup items: AP Routes, Batch Management, Reverse Feed, Accounting Codes
10:30 – 10:45 AM	Break	
10:45 – 12:00 PM	<u>Financial Items: Budgets, Accruals</u>	Overview and Best Practices Discussion: Budgets (Law Firm, Company), Reforecasting, Accrual Functionality
12:00 – 12:45 PM	Lunch	
12:45 – 1:45 PM	TKRR	Review Timekeeper Rate Review: Enabling, Updating Rates, Quick Reports
1:45 – 3:00 PM	Reporting 101	Reporting Basics: Report Types, Adding Fields and Filters, Display Options, Saving, Sharing, Exporting, Report Scheduler
3:00 – 4:00 PM	Questions	
DAY 3		
9:00 – 10:30 AM	Reporting Practice	Practice Reports: Practice Building Basic and Advanced Reports
10:30 – 10:45 AM	Break	
10:45 – 11:45 AM	Advanced Reports	Advanced Reporting: Advanced Filters, High Level Reports, Example Reports
11:45 – 12:30 PM	Overflow/Wrap-Up	Conclusion: Questions, Optimization and Internal Policy Discussions, Next Steps