

# Legal Tracker Ops Clinic

Thomson Reuters Professional Services

## LEGAL OPS CLINIC – ADVANCED AGENDA

### AGENDA – DAY 1

TOPICS	AREAS	EST. TIME
INTRODUCTIONS	Introductions and Legal Ops Advanced Clinic Overview	9:00 – 9:30 AM
SYSTEM SETUP	<b>Essential Configuration Analysis:</b> Is my system setup correctly? <ul style="list-style-type: none"><li>- Organizational Units, Practice Groups, Substantive Law, Templates, Invoice Approval Routes, AP Routes</li></ul>	9:30 – 11:00 AM
BREAK		11:00 – 11:15 AM
MATTERS	<b>The Backbone of Tracker:</b> Am I collecting the right information in the right way? <ul style="list-style-type: none"><li>- Templates, Custom Fields, Conditional Logic, Intake Examples</li></ul>	11:15 – 12:30 PM
LUNCH		12:30 – 1:30 PM
INVOICING	<b>Approving and Paying:</b> Are processes efficient? Is inefficiency costing money? <ul style="list-style-type: none"><li>- Approval Route Analysis and Modification, Auditing, Approval Analysis and Analytics/Reports, AP Routes, Accounting Codes, Vendor IDs</li></ul>	1:30 – 3:00 PM
BREAK		3:00 – 3:15 PM
TKRR	<b>Centralizing Rates:</b> Should I use this? Am I using it correctly? <ul style="list-style-type: none"><li>- Enabling, Updating Rates, Quick Reports, Custom Email Templates, Troubleshooting Audits</li></ul>	3:15 – 4:30 PM

### AGENDA – DAY 2

TOPICS	AREAS	EST. TIME
FINANCIALS PT. 1	<b>Budgets &amp; Accruals:</b> Best practices for collecting, auditing, and reporting? <ul style="list-style-type: none"><li>- Budget Types (CO, LF) Reforecasting, Accrual Functionality, Requirements, Pre-Configured and Custom Reporting</li></ul>	9:00 – 11:00 AM
BREAK		11:00 – 11:15 AM
FINANCIALS PT. 2	<b>AFAs and Task Codes:</b> How can I take budgeting to the next level? <ul style="list-style-type: none"><li>- Task Codes, Pre-Configured Task Code Alerts, Custom Task Codes, Firm Notifications, Firm Portfolios, Volume Discounts</li></ul>	11:15 – 12:30 PM
LUNCH		12:30 – 1:30 PM
REPORTING	<b>Everything Reporting:</b> Which reports should I be running? What do they mean? <ul style="list-style-type: none"><li>- Quick 101 Review, Advanced Filters and Examples, Review Current Reports, Practice Building Reports</li></ul>	1:30 – 4:00 PM
CONCLUSION	<b>Next Steps:</b> What happens now? <ul style="list-style-type: none"><li>- Questions, Policy Discussions, Optimization Plan</li></ul>	4:00 – 4:30 PM