

Legal Tracker Ops Clinic

Thomson Reuters Professional Services

LEGAL OPS CLINIC AGENDA

AGENDA – DAY 1

TOPICS	AREAS	EST. TIME
INTRODUCTIONS	Introductions and Legal Ops Clinic Overview	9:00 – 9:30 AM
USERS & FIRMS	Users, Company and Firm Profiles, System Roles, Matter Roles, Special Matter Access, Dashboard Access, Preferences	9:30 – 10:30 AM
BREAK		10:30 – 10:45 AM
MATTER BASICS	Matter Creation, Management, and Closure; Bulk Updating	10:45 – 12:00 PM
LUNCH		12:00 – 12:45 PM
SYSTEM SETUP PT. 1 <small>CRITICAL SETUP ITEMS</small>	Organizational Units, Practice Groups, Substantive Law, Matter Type Templates, Matter Fields, Conditional Logic, Custom Fields	12:45 – 2:00 PM
BREAK		2:00 – 2:15 PM
SYSTEM SETUP PT. 2 <small>FINANCIAL SETUP ITEMS</small>	Invoice Approval Routes, Invoice Approval Process, Invoice Auditing Options (Expense Codes, Billing Period, Block Billing, Duplicate Billing)	2:15 – 3:30 PM
NON-ESSENTIAL SETUP	Misc. Matter/Financial Options, Learning Center, Email Templates	3:30 – 4:00 PM

AGENDA – DAY 2

TOPICS	AREAS	EST. TIME
SYSTEM SETUP PT. 3 <small>FINANCIAL SETUP ITEMS</small>	AP Routes, Batch Management, Reverse Feed, Accounting Codes	9:00 – 10:30 AM
BREAK		10:30 – 10:45 AM
FINANCIAL ITEMS	Overview and Best Practices Discussion on Budgets (Law Firm, Company), Reforecasting, Accrual Functionality	10:45 – 12:00 PM
LUNCH		12:00 – 12:45 PM
TIMEKEEPER RATE REVIEW	Enabling, Updating Rates, Quick Reports	12:45 – 1:45 PM
REPORTING WORKSHOP PT. 1	Creating Reports, Saving, Sharing, Exporting, Report Scheduler	1:45 – 4:00 PM

AGENDA – DAY 3

TOPICS	AREAS	EST. TIME
REPORTING WORKSHOP PT. 2	Practice Building Basic and Advanced Reports	9:00-10:30 AM
BREAK		10:30-10:45 AM
ADVANCED REPORTS	Advanced Filters, High Level Reports, Example Reports	10:45-11:45 AM
OVERFLOW/WRAP UP	Conclusion, Questions, Optimization and Policy Discussions, Next Steps	11:45-12:30 PM