

# 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<br><i>CRITICAL SETUP ITEMS</i>  | 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<br><i>FINANCIAL SETUP ITEMS</i> | 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<br><i>FINANCIAL SETUP ITEMS</i> | 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 |