

BOOT CAMP AGENDA

THOMSON REUTERS LEGAL TRACKER

Various Locations, 2018

DAY 1

9:00 – 9:30 AM	Introductions	Introductions and Boot Camp overview
9:30 – 10:30 AM	Users & Firms	Review basics of Users and Firms: Company and Firm Profiles, System Roles, Matter Roles, Special Matter Access, Dashboard Access, User 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, Matter Upload
12:00 – 12:45 PM	Lunch	
12:45 – 1:45 PM	<u>System Setup:</u> <i>Essential pt. 1</i>	Review Critical Setup items: Organizational Units, Practice Groups, Matter Type Templates, All Matter Fields, Custom Fields, Custom Email Templates
1:45 – 3:15 PM	<u>System Setup:</u> <i>Non-Essential</i>	Review Non-Essential Setup items: Miscellaneous Matter Options, Miscellaneous Financial Options, Substantive Law, SOP, Date/Event Types, Document Folders, Other Setup Options
3:15 – 4:00 PM	Questions	

DAY 2

9:00 – 10:30 AM	<u>System Setup:</u> <i>Essential pt. 2</i>	Review Financial Setup items: Invoice Approval Routes/Process, AP Routes, Batch Management, Reverse Feed, Accounting Codes, Timekeeper Rate Review
10:30 – 10:45 AM	Break	
10:45 – 12:00 PM	<u>Financial Items:</u> <i>Budgets, Accruals</i>	Overview and Best Practices Discussion: Budgets (Law Firm, Company), Reforecasting, Accrual Functionality, Task Code Alerts, Calendar of Events
12:00 – 12:45 PM	Lunch	
12:45 – 1:45 PM	New Functionality	Review Latest Additions/Updates: User Specific Dashboards, Invoice Auditing, What's New in Tracker Help, Analytics
1:45 – 2:45 PM	Law Firm Perspective	Review Law Firm Side of Tracker: Users/Firm Profiles, Invoicing, Incomplete Tasks (Budgets, Accruals, Status Reports, Matter Requirements), OnePass
2:45 – 3:45 PM	Questions	

DAY 3

9:00 – 10:30 AM	Reporting 101	Reporting Basics: Report Types, Adding Fields and Filters, Display Options, Saving, Sharing, Exporting, Report Scheduler
10:30 – 10:45 AM	Break	
10:45 – 11:45 AM	Advanced Reports	Advanced Reporting: Advanced Filters, High Level Reports, Boot Camp Reports
11:45 – 12:30 PM	Audit Flag Report Card Analysis	Review AFRC: Uncaptured Savings from Expense Codes, LEDES Utilization, Top Audited Firms, Potential Savings from Timekeepers
12:30 – 2:00 PM	Miscellaneous	Overflow/Questions/Wrap-Up: Company or Report Specific Questions, Optimization and Internal Policy Discussions



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