

MatterSphere Induction

1 - Overview & Introduction

Course Description

To provide a basic understanding of how MatterSphere works and integrates with other applications and how it is used within the firm.

For all new starters who will be using MatterSphere

The focus of training will be on basic functionality of MatterSphere to include searching, Client & Matter Creation if required and time recording where necessary.

The course will can be structured to incorporate your Firms specific MatterSphere requirements e.g. conflicts, client and matter production and time recording etc.

Learning Outcomes

By the end of the course, attendees will be able to:

- Create Clients & Matters, Add and edit contacts and time record against document creation.
- How to connect and disconnect from MatterSphere and generate simple documents
- Perform searches and conflict checks and navigate through MatterSphere tabs, ribbons and menus.

Course Duration

The course should last approximately 3.5 hours excluding breaks.

Prior Knowledge

- **Essential knowledge of:** Word and Outlook to a basic level
- **Desirable knowledge of:** Case Management systems

Course Content

- Introduction
 - How MatterSphere works
 - Connection and Disconnection
 - Contacts, Clients, Matters & Associates – how they link
 - Word and Outlook Tabs
- Command Centre
 - Navigation
 - Search options
 - Firm specific Menus/Tabs

- Searching
 - Finding Contacts, Clients & Matters
 - Client, Contact & matter information (Where is it?)
- Contacts
 - Create contacts
 - Edit Contacts
- Client & Matter
 - Create Clients & Matters
 - Conflict searching
 - Edit Client information
 - Edit Matter details
- Matters
 - Matter Types
 - Documents, Associates and other tabs
- Associates
 - Adding Associates
 - Editing Associate information
 - Active/Inactive
- Creating Documents
 - Create telephone notes & Letters (different options)
 - Save options
- User Settings
 - Changing user settings
 - Useful hints.
- Time Recording (optional)
 - Recording time against documents
 - Manual recording
 - Amending time information
 - Checking Timesheets

Course Delivery Format

The session will be delivered in person / on-site by a trainer(s).

The format of the training delivery will be computer based / classroom workshop / demonstration led for the duration of the course.