

MatterSphere Induction

3 - Refresher & Further Features

Course Description

This is a follow up session for all new starters who attended day one and two of the MatterSphere induction,

The course aids as a refresher following users' practical application of MatterSphere daily. It also allows users to raise questions and queries following induction along with providing some further advanced use and hints and tips to further develop skills and knowledge.

Learning Outcomes

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

- Create and manage documents in Mattersphere.
- Search and find Clients, Matters & Documents
- Work with Milestones & tasks including precedent documents
- Perform faster searching for documents
- Add and manage appointments and Matter notes
- Have a greater understanding of MatterSphere functionality

Course Duration

The course should last approximately 3.5 hours excluding breaks.

Prior Knowledge

- **Essential knowledge of:** MatterSphere (from induction training)

Course Content

- Refresh
 - Searching for information
 - Creating Client & Matter
 - Conflict searching & Time recording
 - Working with documents
- Milestones & Taskflow further features
 - Adding Milestone Tasks
 - Assign & Unassign tasks
- Working with Associates
 - Amending Associate information
 - Associates via MatterSphere or Word
 - Managing Associates in your matter

- Word & Outlook
 - Emailing multiple attachments
 - Emailing specific versions
 - Editing previous versions
 - Marking versions
 - Editing documents including contact, client & Associate information

- Further Features
 - Adding Matter Notes
 - Matter Alerts
 - Importing documents
 - Importing versions
 - Sending document links
 - Adding appointments
 - Compare documents

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.