

# MatterSphere Induction

## 2 - Taskflow & Document Management

### Course Description

To introduce new starters to working with taskflows and document management including Word and Outlook.

For all new starters who have attended Introduction & Overview

The course will enhance the basic induction and provide users with skills to work on a daily basis with all documents and emails within MatterSphere and to work with taskflows for specific matter types.

The course 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 documents and emails
- Work with tasks, generate new tasks and edit existing tasks
- Manage documents and taskflows for effective working.

### Course Duration

The course should last approximately 3.5 hours excluding breaks.

### Prior Knowledge

- **Essential knowledge of:** Basic MatterSphere from Introduction & Overview
- **Desirable knowledge of:** Case Management systems

### Course Content

- Recap
  - Overview of Matters
  - Searching
- Generating Documents
  - Create Word Documents & Letters
  - Save options
  - Create Emails
  - Save options
  - Add Attachments

- Editing Documents
  - Opening a document to edit
  - Save document versions
  - Versions -v- Revisions
  - Managing versions
  
- Saving – Outlook
  - Save incoming emails
  - Save sent mail
  - Save attachments
  - Using Save As
  
- Precedents
  - Searching Precedent Manager
  - Using a precedent
  - Precedent fields – how to work with fields
  
- Document Management
  - Searching Documents
  - Amending document descriptions
  - Sorting & ordering
  - Email documents
  - Importing documents
  
- Milestones & Taskflow
  - What are Milestones & Tasks
  - Working with tasks – Expand, action, complete
  - Identifying Overdue, Completed and live tasks
  - Adding New Tasks & editing Task dates

## 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.