



LegalServer Site Administrator

National Training

Oct 17 & 18 - Chicago

Day 1 - Morning

Main Room

9:00 - 10:00 Introduction and Welcome

10:00 - 11:00 How to Run a Report

11:00 -11:15 Break

11:15 -12:30 Report Writing Fundamentals

- ❖ Reports Manual and Example Reports
- ❖ Creating New Reports
- ❖ Module data sources: Matters, Timekeeping, and others
- ❖ Setting Attributes, Filters, and Columns

Breakout Room 1

10:00 - 11:00 New Tools and Enhancements

- ❖ Topics TBD

11:00 -11:15 Break

11:15 -12:30 Advanced Grants Management

- ❖ Grant Managers/Reporters in agencies with AGM
- ❖ How AGM Works
- ❖ AGM Requirements and Assumptions

Breakout Room 2

10:00- 11:00: Office Hours

- ❖ Hands-on help answering questions and solving issues
- ❖ Welcome to questions about configurations, reports, etc.

11:00 -11:15 Break

11:15- 12:30 Office Hours

- ❖ Hands-on help answering questions and solving issues
- ❖ Welcome to questions about configurations, reports, etc.



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Day 1 - Afternoon

Main Room

12:30 - 1:15 Lunch

1:15 - 2:30 My First Report (building reports in a workshop environment)

2:30 - 3:00 Networking Break

3:00 - 4:00 Process Management for Total Beginners

- ❖ Creating New Fields
- ❖ Maintaining Lookup Lists
- ❖ Process Management - Processes, Forms, and Profiles/Section Fronts

4:00 - 5:00 My First Process

Breakout Room 1

12:30 - 1:15 Lunch

1:15 - 2:30 SMS (Texting Module)

2:30 - 3:00 Networking Break

3:00 - 4:15 Forecasting and Dashboards

4:15 - 5:00 Pro Bono Tools

- ❖ Description of the tools and use cases
- ❖ Configuring Pro Bono Tools
- ❖ Optional configurations (level of expertise, default intervals for target date by LPC, etc.)

Breakout Room 2

12:30 - 1:15 Lunch

1:15 - 2:30 Office Hours

- ❖ Hands-on help answering questions and solving issues
- ❖ Welcome to questions about configurations, reports, etc.

2:30 - 3:00 Networking Break

3:00- 4:00 Veteran Advanced Problem Solving Breakout

Experienced admins problem solving with LegalServer staff, including access restrictions, pro bono management, and other more complex tracking scenarios



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Day 2 - Morning

Main Room

9:00 - 10:30 Workshop - My First Report Part 2

- ❖ Build your own reports in a workshop/learning lab environment
- ❖ Introduction to Charts and Graphs

10:30 - 10:45 Break

10:45 - 12:00 Basic Grants Management Fundamentals

- ❖ Grant Managers/Reporters
- ❖ Basic Grant Information Tracking
- ❖ Grant Filters

12:00 - 1:00 Lunch

Breakout Room 1

9:00 - 10:30 Introduction to Guided Navigation

10:30 - 10:45 Break

10:45 - 12:00 Policy Discussion - Coordinated Intake & Referral

- ❖ Public-facing tools in LegalServer
- ❖ Identifying legal issues
- ❖ Tracking people/ sharing data

12:00 - 1:00 Lunch

Breakout Room 2

9:00 - 10:30 Office Hours

- ❖ Hands-on help answering questions and solving issues
- ❖ Welcome to questions about configurations, reports, etc.

10:30 - 10:45 Break

10:45-12:00 Office Hours

- ❖ Hands-on help answering questions and solving issues
- ❖ Welcome to questions about configurations, reports, etc.

12:00 - 1:00 Lunch



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Day 2 - Afternoon

Main Room

1:00 - 1:45 New Development

- ❖ Preview of exciting tools in prototype and early development stages

1:45 - 2:00 Break

2:00 - 3:00 Online Intake Methods Fun Tour

- ❖ Description of the online intake module
- ❖ Example online intake processes in use by peer agencies

3:00- 4:00 Change Management

- ❖ Future proofing your LegalServer instance
- ❖ Plan for changes and tips for managing change when it happens

4:00 - 4:30 Wrap Up

Breakout Room 1

1:45 - 2:00 Break

2:00 - 2:45 Introduction to APIs

2:45 - 4:00 API Workshop

- ❖ Hands-on with creating API queries from the outgoing API too

Breakout Room 2

1:45 - 2:00 Break

2:00 - 4:00 Report Writing - Advanced Problem Solving

Small group for very experienced report writers.

- ❖ Aggregation
- ❖ Scheduled Reports
- ❖ Aggregation Problems
- ❖ Charts and Graphs