



# How to Guide: Making Clocktimizer eBilling Solutions a Reality

The following pages provide detailed steps on using Clocktimizer to address Forecast and Accruals Tracking, New Working Timekeeping Tracking, and Outside Counsel Narrative Control Reporting. These examples are meant to inspire additional creativity from your end—so tweak and adjust to best match your firm’s needs, expanding upon the ways Clocktimizer can help.

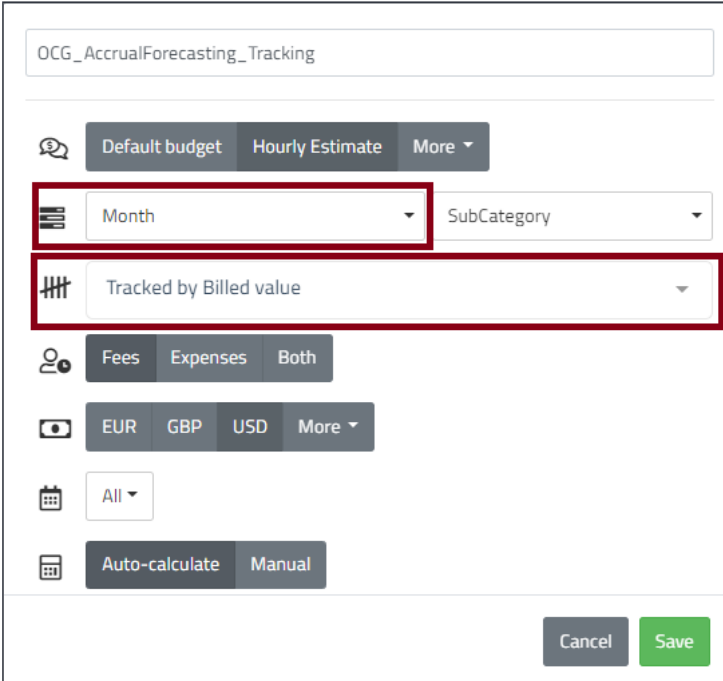
## Forecast and Accrual Tracking

### Creating the Tracker

Tracking a planned Forecast and its reported Accruals begins with creating a new budget from within the Budget module. For this example, we've tagged the matter spend as an Hourly Estimate, organized the partition by Month from within the Period section, indicated to track by Billed value, and noted that we're monitoring only the Fees and in USD.

For Forecasts that need additional groupings, or a more sophisticated organization, Clocktimizer's Budget structure supports two partition layers, as well as the creation of multiple budgets for the same client or matter. Additional examples of Forecast models might include partitioning by Year and Quarter, or using the Calendar feature to limit the focus to a specific customized non-traditional time period, such as February through May.

### Creating the Forecast and Accrual Tracker



### Populating the Tracker Details

Once the Budget details have populated, use the Partition prompt to add your Period details. For our model, we're creating a monthly Forecast tracker, and so bring in these details by entering first the year and the month in the search prompt, clicking on each needed result to quickly and efficiently frame the model.

For the Display details, we recommend using the following:

- Budget                      ▪ Writedoff                      ▪ Work in Progress
- Billed Value              ▪ Recorded Value              ▪ Paid Value
- Percentage

To provide context, the goal of the Forecast and Accrual Tracker is to document the projected forecast, as shared with the client, and then use it to monitor both ongoing accrual against that forecast—the Work in Progress—as well as the final spend, the Billed Value. In tandem with providing transparency and oversight on the Forecast, we want the spend model to also raise attention on other metric areas that might indicate a potentially brewing problem: Writedoff and Paid Value are both key indicators of matter spend translating to harm. Higher Writedoff values indicate matter spend going out of control or Forecasting that is in desperate need of an updated evaluation, while Paid Values that indicate short-payments or even no payments at all, reflect a potentially unhappy client.

Use the Budget column to enter the Forecast values as shared with the client; this is your internal reference point to track against—to ensure that what’s been relayed and promised to the client is properly reflected in the actuals as they realize.

Once the budget is linked to your live matter, update the tracking and KPI tiles to your preference. In our example, we’re tracking by Realized Value to demonstrate how closely our Billed Values are aligning with our client Forecast; Realization values crossing 100% would indicate that we’re billing out more than we promised we would and so demonstrate matter scope creep. Our KPI tile is set to show the ongoing Writedoff values and call attention to a number that may indicate scope creep as well, that while contained for the client through writedoffs, still translates to internal harm if used in excess.

## Forecast and Accrual Tracking Details

OCG\_AccrualForecasting\_Tracking
Other budgets

**Matter:** 123432-000007 Acquisition BattleTown USD

Client: GrizzlyBV. 123432

Unattach

Hourly Estimate

**\$117,500**

(Billed value)

**Realised value**

**\$123,907 (105.45%)**

(Billed value)

**Writedoff**

**\$0**

Recorded value - Billed value - Work in progress

**Note**

Monthly forecasting accrual tracking for 123432.000007 Acquisition Battletown USD

Bulk edit
17 Display

Month	Budget	Billed value	Percentage	Writedoff	Recorded value	Work in progress	Paid value	Actions
2020 March	\$26,000	\$26,714	103%	\$0	\$26,714	\$0	\$0	<a href="#">✕</a> <a href="#">👁</a>
2020 April	\$17,500	\$17,865	102%	\$0	\$17,865	\$0	\$0	<a href="#">✕</a> <a href="#">👁</a>
2020 May	\$25,000	\$24,325	97%	\$0	\$24,325	\$0	\$0	<a href="#">✕</a> <a href="#">👁</a>
2020 June	\$5,000	\$8,691	174%	\$0	\$8,691	\$0	\$0	<a href="#">✕</a> <a href="#">👁</a>
2020 July	\$15,000	\$17,842	119%	\$0	\$17,842	\$0	\$0	<a href="#">✕</a> <a href="#">👁</a>
2020 August	\$15,000	\$14,590	97%	\$0	\$14,590	\$0	\$0	<a href="#">✕</a> <a href="#">👁</a>
2020 September	\$14,000	\$13,881	99%	\$0	\$13,881	\$0	\$0	<a href="#">✕</a> <a href="#">👁</a>
<b>Total</b>	<b>\$117,500</b>	<b>\$123,907</b>	<b>105%</b>	<b>\$0</b>	<b>\$123,907</b>	<b>\$0</b>	<b>\$0</b>	

## Using the Tracker for Oversight

Once the budget has been populated with all of the Forecast details and Display options, as well as linked to the live matter, the actual oversight begins!

In our example, we're using Clocktimizer's Budget module not just for the purposes of monitoring matter spend against the client Forecast, we're also using it to push notifications and action requirements in relation to the client's requirements: Providing monthly Accruals updates and ensuring the invoice Billed Values match the Forecast and Accruals. Clocktimizer's helpful and convenient Email Updates and Budget Warnings allow this part of the process to be fully automated, driving process ownership and fulfillment.

In the example Email Update below, we've created a weekly update delivery, to ensure attention is kept on the Forecast and related accrued time. The update is sent once a week to its target audience, and the message shares the goal of the update, as well as potential actions. In our second example, the Email Update is used to warn of the upcoming Accrual due date, scheduled to be sent three days before the due date every month. The message again is used to drive expected action from the receiving audience. Our final Email Update example is used for the actual Accrual due date, and in the message, reminds the audience of the potential short pay penalty that might be imposed if the submission is late.

While client requirements may differ, these examples serve as potential models on how the Email Update can be adapted to meet a number of transparency and notification needs.

For clients that require Forecast updates or corrections when Billed Values exceed the original projections, use the Warning notifications to trigger automated alerts that prompt associated action. In our final example, we've set a threshold warning for each month of 100%. Since we're tracking Billed Value, should the Billed Value exceed the Forecast amount, the Warning will trigger an email informing of the excess and prompting the matter manager and support staff to make the necessary updates for the client.

We recommend using the Warning feature to always capture Out of Scope instances, regardless of client requirements, as a safety net for the spend monitoring.

## Email Update – Weekly Update Example

Edit scheduled e-mail update

Subject
Weekly Forecasting Update: OCG\_AccrualForecasting\_Tre ✓

Send to
☒ Only me  
☐ Specify user accounts

Send from
noreply@clocktimizer.com

Repeats
Weekly every 1 Week

Day of week
Mon Tue Wed Thu Fri Sat Sun

Starts
Mar 07, 2023

Ends
Never

Time of day
04:00  
Central Europe Standard Time

Message

This is your weekly forecasting update for Battletown USD. Please review the monthly period, as billed actuals accrued in excess of the forecast may impose an up to 10% short-pay from the client if not communicated to them ahead of invoicing.

Currently accruing WIP is also noted for the current period.

Next occurrence
Apr 04, 2023, 04:00 AM

Save

## Email Update – Three Day Warning Example

Edit scheduled e-mail update

Subject
Forecast Deadline Reminder - Due in 3 Business Days: OC ✓

Send to
☒ Only me  
☐ Specify user accounts

Send from
noreply@clocktimizer.com

Repeats
Monthly every 1 Month

On day
27 of each month

Starts
Mar 07, 2023

Ends
Never

Time of day
03:00  
Central Europe Standard Time

Message

Your monthly accrual forecast is due on the 30th. This is your three day deadline reminder; please review current accrual numbers and share any concerns with your assigned biller.

Next occurrence
Apr 27, 2023, 03:00 AM

Save

## Email Update – Due Date Deadline Example

Edit scheduled e-mail update

Subject
Monthly Forecast Due Today: OCG\_AccrualForecasting\_Ti ✓

Send to
☒ Only me  
☐ Specify user accounts

Send from
noreply@clocktimizer.com

Repeats
Monthly every 1 Month

On day
30 of each month

Starts
Mar 07, 2023

Ends
Never

Time of day
02:00  
Central Europe Standard Time

Message

Your monthly forecast accrual is due today by close of business. The client may impose a 3% short pay penalty if submitted after the deadline on the related billed work. Please review the current WIP values and confirm the final estimate with your biller.

Next occurrence
Apr 30, 2023, 02:00 AM

Save

## Forecast Warning Example

Schedule budget warnings

Select and fully set at least one warning type. At least one notification e-mail address has to be entered to schedule the budget warning successfully.

☐ Enable warnings on % of budget total used

☒ Enable warnings on % of budget categories used

100%

☐ Enable warnings on % of budget subcategories used

☐ Notify when any new out of scope work is detected

Send notification to
Amanda Mui

Include custom message in warning e-mails

The Billed Values on Acquisition Battletown USD have exceeded the client Forecast:

Cancel OK

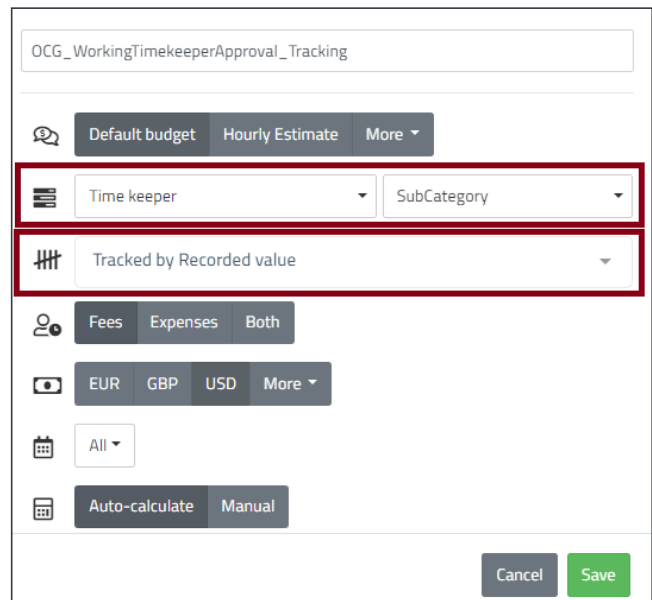
## New Working Timekeeper Tracking Creating the Tracker

Similar to the Forecast and Accrual tracking, monitoring New Working Timekeepers begins with creating a new budget in the Budget module.

In our model, we've tagged the matter spend as a Default Budget, organized the partition by Timekeeper, indicated to track by Recorded Value, and noted that we're monitoring only the Fees and in USD. We intentionally chose Recorded Value and not Hours for tracking to drive attention on the potential financial hit if the associated timekeeper's approval is not acted upon, or worse, chosen to be written off.

For monitoring that needs to occur at a Client and Matter level, we'd recommend linking to the live Client, and then within the Partition categories choose first Matter and then Timekeeper.

### Creating the New Working Timekeeper Tracking



## Populating the Tracker Details

Once the Budget details have populated, use the Partition prompt to add your Timekeeper details. For our model, we're relying on an Engagement letter that detailed the initial working group of timekeepers, along with their agreed special rates.

For the Display details, we recommend using the following:

- Recorded Value
- Blended Rate
- Hours

While not included in our model, adding the Paid Value is another helpful metric that can help raise awareness on potential collections difficulties associated with a specific timekeeper.

Using the Budget module for New Working Timekeeper Tracking is a creative repurposing of what's traditionally structured as a matter spend feature. Because of Clocktimizer's adaptable structure, we're using additional features within the tool to help add valuable context to the timekeeping monitoring, including expected vs. actual rate values.

Where rate insight and monitoring would be helpful, click on the Clock icon located between the Timekeeper column and the Recorded Value column. This opens up Rate Editing, which is normally used to help calculate a budget value based upon rate and hours. In our model, this section is being used to memorialize the approved timekeeper rate, to create a frame of reference when comparing against the Blended Rate column value.

Because the goal of this model is to track the addition of new timekeepers, the actual budget values are unimportant. This is why the Budget and Percentage columns were not included in the Display details. To this end, the number of hours entered in the Rate Edit section are also irrelevant. We recommend using 1 for the Hour values, as a placeholder—unless you have need of capturing projected hours as well.

Finally, once the live client or matter is linked, use the Hide in PDF eye icon on the first two tiles – Budget and Tracking—to suppress this detail. The value of this tracking model is not the traditional matter spend, but rather the addition of new timekeepers to the spend. By suppressing these two tiles, the PDF shared over scheduled Email Update or downloads will be less cluttered and drive focus on its intent: Timekeepers!

For the KPI tile, we recommend using Timekeeper Count, to quickly and easily have a high-level overview of the overall timekeeper count involved.

## New Working Timekeeper Tracking Details

OCG_WorkingTimekeeperApproval_Tracking						
Matter: 25511472-062267 Project Grateful Pants Client: 30545121 Vaughn Ltd.						
<div> <div> <div>Unattach</div> <div> <div>Budget</div> <div>\$1,482</div> <div>(Recorded value)</div> </div> </div> <div> <div>Realised value</div> <div>\$8,729 (588.99%)</div> <div>(Recorded value)</div> </div> <div> <div>Time keeper count</div> <div>5</div> <div>Number of time keepers in the selection</div> </div> <div> <div>Note</div> <div>Working Timekeeper Approval Tracking for Project Grateful Pants:</div> <div>Approved Rate entered in Rate field</div> </div> </div>						
<div> <div>Bulk edit</div> <div>1f</div> <div>Display</div> </div>						
Time keeper	Rate	Hours	Recorded value	Blended rate	Hours	Actions
Begza Smithies	649	1	\$2,208	\$649	3.4h	
Brink Witham	150	1	\$1,559	\$166	9.4h	
Lomax Reith	290	1	\$29	\$292	0.1h	
Saadet Macpherson	393	1	\$3,575	\$393	9.1h	
Wahbeh Lukin	0	0	\$1,359	\$469	2.9h	
Total displayed			\$8,729	\$351	24.9h	

## Using the Tracker for Oversight

With the New Working Timekeeper Tracking budget created, it's time to schedule Email Updates, Warnings, and for this example, a report to drive oversight!

The value of using Clocktimizer to track Working Timekeeper monitoring is to insert order on the administrative process and get a jumpstart on the client's approval timeline; Clocktimizer is being used to create a structured process that can shorten both days to bill and days to collect.

### Out-of-Scope (New Unapproved) Timekeeper Message Example

*A new, unapproved working timekeeper has entered time on your matter, Project Grateful Pants. Your billing team members will connect with you to confirm the timekeeper, their approved rate, and begin the client approval process. Until the timekeeper is approved, their time cannot be included on an invoice and may potentially need to be deferred depending upon the client's approval timing. A separate report with the unapproved timekeeper's timecards will be shared for additional review.*

The first step, then, is to schedule a Warning for whenever a new timekeeper enters time on the linked client or matter—in Clocktimizer functionality, this translates to an Out-of-Scope Warning.

In our example message, we explain the source of the Warning, as well as reference the process owners who will work with the matter manager to begin the approval process. We also describe an associated report that will be shared with the unapproved timekeeper timecards, a helpful area of transparency that can speed up the matter manager's review.

### Out-of-Scope (New Unapproved) Timekeeper Warning

Schedule budget warnings

Select and fully set at least one warning type.

At least one notification e-mail address has to be entered to schedule the budget warning successfully.

☐ Enable warnings on % of budget total used
 ☐ Enable warnings on % of budget categories used
 ☐ Enable warnings on % of budget subcategories used
 ☒ Notify when any new out of scope work is detected

Send notification to

Amanda Mui (me)

Include custom message in warning e-mails

A new, unapproved working timekeeper has entered time on your matter, Project G

Cancel

OK

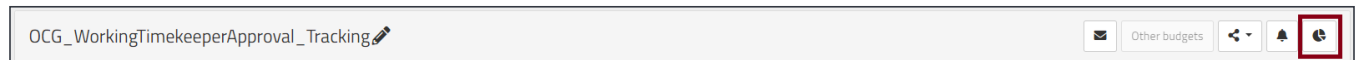
8

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The referenced report in the Warning is built in Clocktimizer's Drilldown module and simplified by using the Drilldown shortcut from the New Working Timekeeper Tracking budget built in our example. Click on the shortcut to jump to Drilldown, which will populate automatically with the details of your budget, including the Partition and its additions. We recommend making the report at the same time the budget is created.

## Drilldown Shortcut

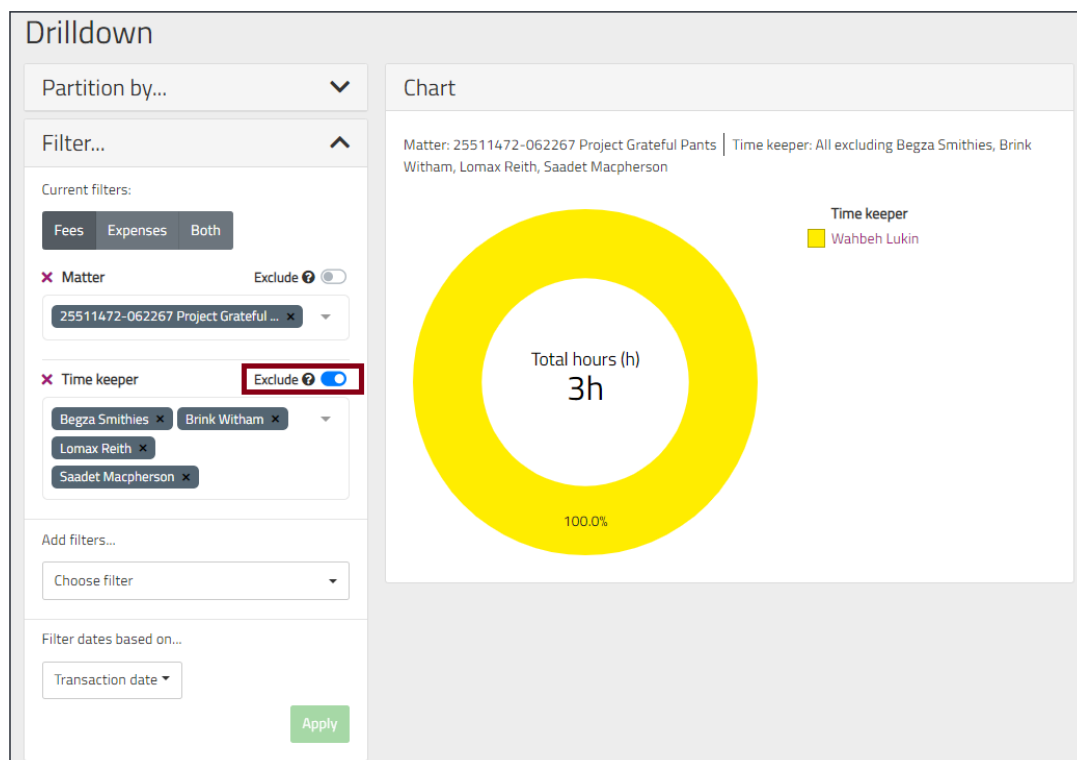


In Drilldown, review the Filters to see that the report has been narrowed down to your linked client or matter, as well as the Timekeepers included in the budget's Partition data. The goal of this report is ultimately to show the timecard detail for any timekeepers who are not approved; because of this, use the Exclude button on the Timekeeper filter to change the logic to only show those timekeepers and their data that are not in the Filter list.

As new timekeepers begin work on the client or matter—and get approved—update the report to include their names to the excluded Filter list to keep the report relevant and helpful.

In our report example, after updating the Filters, only one timekeeper is shown—the new and unapproved one indicated by our Warning.

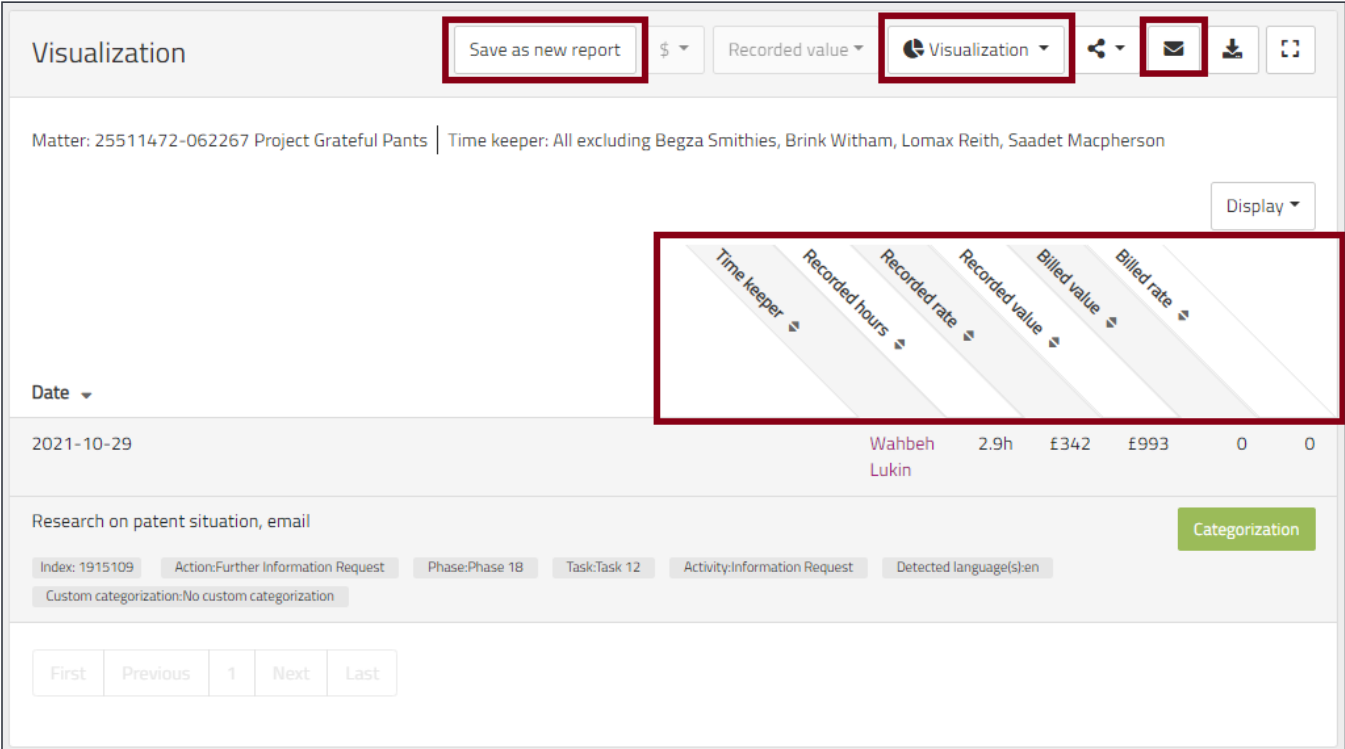
## Drilldown Details Example



Scroll down to the Visualization section of Drilldown to choose Timecard from the list of options. By default, the Timecard visualization will include the Recorded and Billed Hours, Rate, and Value, all of which offer helpful context, as well as the full timecard detail including narrative for the entries making up the unapproved timekeeper's time.

When using this report to augment the oversight process, we recommend both saving the report, to use ad-hoc, and scheduling delivery of the report using the Email Update option.

## Timecard Visualization Report Details



Visualization

Save as new report \$ Recorded value Visualization

Matter: 25511472-062267 Project Grateful Pants | Time keeper: All excluding Begza Smithies, Brink Witham, Lomax Reith, Saadet Macpherson

Display

Time keeper	Recorded hours	Recorded rate	Recorded value	Billed value	Billed rate
Wahbeh Lukin	2.9h	£342	£993	0	0

Date

2021-10-29

Research on patent situation, email

Index: 1915109 Action: Further Information Request Phase: Phase 18 Task: Task 12 Activity: Information Request Detected language(s): en

Custom categorization: No custom categorization

First Previous 1 Next Last

In our Email Update example, we chose an extreme treatment, due to the sensitivity of our mock client's approval timeline, and decided to check for unapproved working timekeeper timecards daily. In addition, the entire data period set is reviewed, so that the process owner doesn't lose sight of the work. In our message, we've identified the cause of the report, detailed the expected action, and raised awareness on the need to update the report filters.

As timekeepers are approved and the budget updated to include their approved rate and the hour holding place, the report should be updated, preventing the related timecards from populating on the report. The value of including a scheduled timecard visualization report is to offer convenience to the matter manager's review—as well as the process owner. In our example, the billing team handles this initial review, and very well might recognize that the time is misplaced, or that the timekeeper noted it should be written off.

By adding Clocktimizer's drilldown support to this oversight, we've added transparency and one-stop review, further refining and improving the speediness and accuracy of the process.

### Timecard Visualization Email Update Example

Edit scheduled e-mail update

Subject
Unapproved WTK Timecard Detail - Project Grateful Pants ✓

Data period ⓘ
☒ Use all data
☐ Use current period selection
☐ Select data period

Send to
☒ Only me
☐ Specify user accounts

Send from
noreply@clocktimizer.com

Repeats
Daily
every
1
Day

Starts
Apr 03, 2023

Ends
Never

Time of day
03:00
Central Europe Standard Time

Message
You're receiving this email because timecards belonging to unapproved working timekeepers exist on Project Grateful Pants. Please review the report to ensure all noted time has been accounted for and the associated WTK approval process begun. For time belonging to newly approved WTKs, you may need to update the report to include them in the exclusion list.

Next occurrence
Apr 03, 2023, 03:00 AM

Save

In our example, since we're using the Rate Edit feature to also keep an eye on discrepancies between the approved rate and the blended rate, we've also included messaging regarding the billing team's role in this oversight.

We recommend one additional area of oversight, to ensure regular review and awareness of the new working timekeepers, as well as their approval status: A weekly status Email Update. In the budget module, use the Email Update option to create a weekly email, structured to raise awareness on the list of working timekeepers and their approval status.

### Email Update – Weekly Status Update Example

Edit scheduled e-mail update

Subject
WTK Approval Status Update: OCG\_WorkingTimekeeperA ✓

Send to
☒ Only me
☐ Specify user accounts

Send from
noreply@clocktimizer.com

Repeats
Weekly
every
1
Week

Day of week
Mon Tue Wed Thu Fri Sat Sun

Starts
Mar 07, 2023

Ends
Never

Time of day
16:00
Central Europe Standard Time

Message
This report reflects all working timekeepers currently involved with your matter. Timekeepers indicated in red are not yet approved by the client and cannot have their time billed.  
Any differences in the Rate field and the Blended Rate field may result in short payments or rejections and should be reviewed by your biller for correction.

Next occurrence
Apr 04, 2023, 04:00 PM

Save

## Outside Counsel Narrative Control Reporting Structuring the Reports

Clocktimizer reports are built using its Drilldown model, which operates as a simple power pivot tool. The following reports are examples of using the Drilldown to identify narrative areas of concern and drive awareness and action as a result of the reporting.

Drilldown begins with choosing your report objects in the Partition, coupled with Filters to narrow the focus to a specific data set. In our Narrative Control models, we largely rely on the Timekeeper partition, which allows the creation of both a summary view, helpful when using reports to populate Dashboards, and a detailed timecard view, which we'll be using to send scheduled Email Updates.

Depending upon the needed perspective, or the audience, other helpful Partition options include Matter Manager, Client, and Practice group (available under a number of partition headers).

### Partition Details

Partition by...	
<input type="text" value="Search partitionings....."/>	
Client	>
Activity	>
Activity group	>
Cost Type	>
Matter	>
<b>Time keeper</b>	<b>&gt;</b>
Client manager	>
Matter manager	>
Originating fee earner	>
Period	>
Quality	>
Billing	>

The Drilldown filters are where we narrow the focus of the data set. For our examples, we're relying mostly on those filters that consider the timecard narrative, leaning on the power of Clocktimizer's natural language processing to include narrative review and analysis.

In each instance, we recommend using a simple formula for combining filters effectively: Where to Look + What to Look For. In our examples, we filter by Matter Number, Billing Status, and various narrative search elements. Billing Status is helpful in narrowing down the view to Work in Progress only; by scoping the report to look at Not Billed entries, our focus remains proactive, to review and act upon those timecards that are still unfinalized in the financial system and correct them before their narratives prompt potential short payments or rejections.

Our Drilldown examples include reports that identify:

**Restricted Words or Phrases**

- Filter on Search Narratives to search timecards for the use of any specified words or phrases

**Restricted Phase or Task Codes**

- Filter on Phase, Task, and Action Codes to quickly identify timecards using restricted coding; this is particularly helpful for firms that see significant amounts of timecard transfers, or struggle with maintaining their task/activity code sets

**Restricted Activities**

- Filter on Activity to use Clocktimizer's algorithm to identify restricted areas of work that might be captured in the narrative by a wide range of varying words, phrases, and descriptions

**Block Billing**

- Filter on Quality and Specificity to locate timecards that include more than one activity; this goes far beyond block billing searches that rely on punctuation like semi-colons or conjunctions
- Simplify the filter search by using the Exclude feature to only find those timecards with more than one activity in the narrative

**Narrative Quality**

- Filter on Quality to gain insight on your timekeepers' narrative quality and identify timecards that are lacking in description and context

## Restricted Words or Phrases Filters

Filter...

Current filters:

Fees Expenses Both

✕ Matter

Exclude ?

123432-000007 Acquisition BattleT...

✕ Search narratives

Exclude ?

Drafting

+ Add search term

✕ Billing status

Exclude ?

NotBilled

Add filters...

Choose filter

Filter dates based on...

Transaction date

Apply

## Restricted Coding Filters

Filter...

Current filters:

Fees Expenses Both

✕ Matter

Exclude ?

123432-000007 Acquisition BattleT...

✕ Phase

Exclude ?

L100

✕ Billing status

Exclude ?

NotBilled

Add filters...

Choose filter

Filter dates based on...

Transaction date

Apply

## Restricted Activities Filters

Filter...

Current filters:

Fees Expenses Both

✕ Matter

Exclude ?

123432-000007 Acquisition BattleT...

✕ Activity

Exclude ?

Project Management

✕ Billing status

Exclude ?

NotBilled

Add filters...

Choose filter

Filter dates based on...

Transaction date

Apply

## Left: Block Billing Filters

## Right: Narrative Quality Filters

Filter...

Current filters:

Fees Expenses Both

✕ Matter

Exclude ?

83485751-814643 Project Defeate...

✕ Specificity

Exclude ?

1

✕ Billing status

Exclude ?

NotBilled

Add filters...

Choose filter

Filter dates based on...

Transaction date

Apply

Filter...

Current filters:

Fees Expenses Both

✕ Matter

Exclude ?

AB20610177 Dog vs. Cat

✕ Quality

Exclude ?

Vague

Uncategorizable

✕ Billing status

Exclude ?

NotBilled

Add filters...

Choose filter

Filter dates based on...

Transaction date

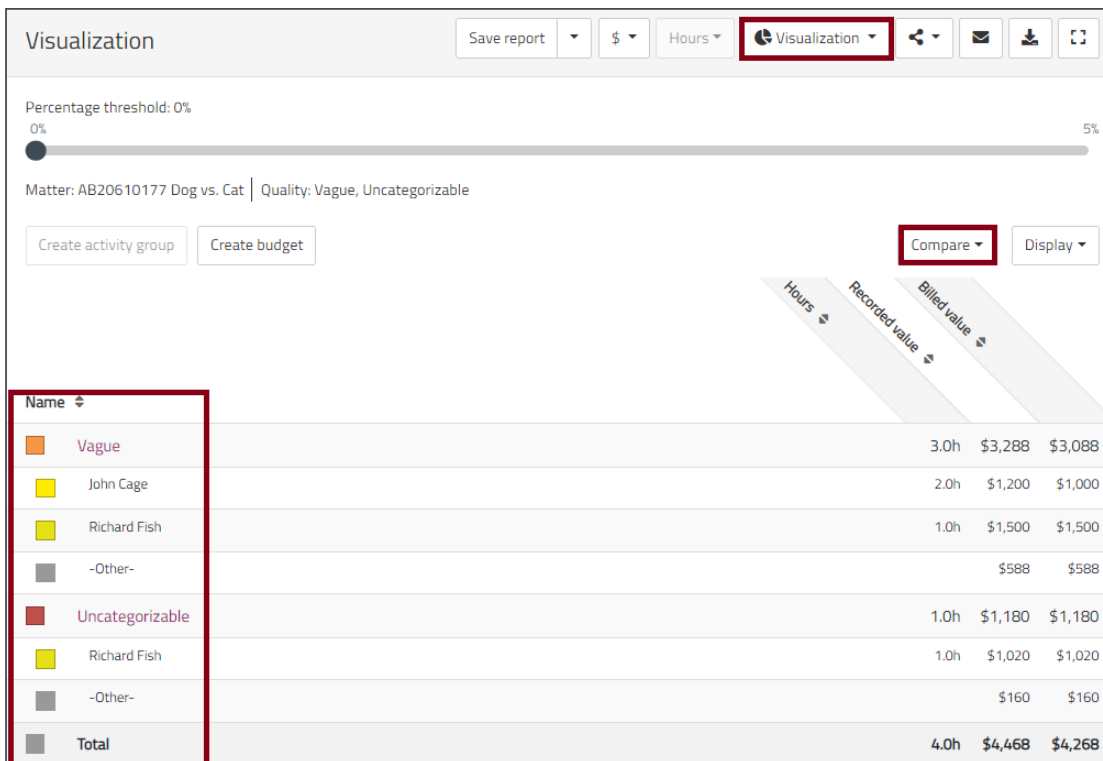
Apply

## Report Visualizations

Drilldown includes 21 different report visualizations to analyze and represent Clocktimizer data. We recommend two models for Narrative Control oversight that can be used as needed to address the audience level for review: Summary and Detail. Created reports can be scheduled for cadenced delivery using the Email Update feature, run as needed for ad-hoc requests, and organized in a Dashboard view where a concentrated data story might be featured or managed.

In the Summary view for Narrative Quality, we used the Expanded Visualization to add a second layer of summary review, to show which timekeepers made up the Vague and Uncategorizable narrative areas. Display offers a number of metric choices; for our example, we kept it simple: Hours, Recorded Value, and Billed Value.

### Summary Report Example – Narrative Quality



For the Detailed view of the Narrative Quality report, we used the Timecard Visualization, which showcases the full timecard narrative, the associated timekeeper, the date of the entry, and additional metrics based upon Display choices.

Additionally, the timecard detail includes a listing of related timecard attribute tags, including the index number, any entered phase or task codes, the timecard activities, and the identified language.

## Detailed Report Example – Narrative Quality

Visualization

Save report

\$

Hours

Visualization

Matter: AB20610177 Dog vs. Cat | Quality: All excluding Good

Display

Date

2018-12-08

Nelle Porter

0.0h

\$160

\$160

Documents collection

Index: AB20610177-000121

Phase:L100

Task:L120

Activity:Uncategorizable

Detected language(s):en

Custom categorization:No custom categorization

Categorization

2018-12-07

Nelle Porter

0.0h

\$160

\$160

Review parent application

Index: AB20610177-000119

Phase:L100

Task:L120

Activity:Other Applications

Detected language(s):en

Custom categorization:No custom categorization

Categorization

2018-11-18

Richard Fish

0.0h

\$60

\$60

Call with opposing counsel

Index: AB20610177-000095

Phase:L100

Task:L110

Activity:Other Communication

Detected language(s):en

Custom categorization:No custom categorization

Categorization

## Using the Reports for Oversight

Once you've constructed your Drilldown report, be sure to Save it for future use. Next, just as you did in the Budget module, use Email Update to schedule regular updates and notifications. There's one key difference between Email Update in Drilldown versus other areas of Clocktimizer: the option to choose the Data Period. Because we've filtered our example to only look at Not Billed (Work in Progress) timecard data, we recommend the Use All Data option. This option will ensure that even if the data was on the prior report, if it's still unresolved, it doesn't drop from the radar.

Additionally, because most of our report examples are being used to identify problematic timecards and correct issues before they reach the client, we recommend creating daily updates. This may seem like an extreme choice, and when first instituting an oversight measure like this, the volume, in fact, may be quite high; as timecards are corrected—and more importantly the timekeepers educated—the prompted instances should decrease as a reflection of the process improvement.



A daily notification also helps prevent the same client-restricted event from reoccurring the next day. Increased oversight leads to increased awareness, which leads to less problems tomorrow.

In our example below, we've set a daily alert to capture all timecards with narratives that reflect Project Management activity—a restricted type of work according to our mock client's Outside Counsel Guidelines. In our message, we've provided guidance to the process owner, a member of the billing team, on how to address and correct the time entries. For our mock firm, as part of the initiative that introduced using Clocktimizer to help improve timecard oversight, they created an escalation path for working timekeepers who continue to struggle with their timecard content, even after being contacted by the billing team.

## Drilldown Report Email Update Example – Restricted Activities

Edit scheduled e-mail update

Subject

Daily Update: Restricted Narrative Activities Alert

Data period

☒ Use all data
 ☐ Use current period selection
 ☐ Select data period

Send to

☒ Only me
 ☐ Specify user accounts

Send from

noreply@clocktimizer.com

Repeats

Daily

every

1

Day

Starts

Apr 03, 2023

Ends

Never

Time of day

03:00

Central Europe Standard Time

Message

This reports shows all unbilled timecards with narratives that reflect activities that are not allowed by the client. Review the timecards with the WTKs to make the necessary changes. Escalate any repeat offenders as per the stated policy for matter manager review and assistance.

Next occurrence

Apr 03, 2023, 03:00 AM

Save

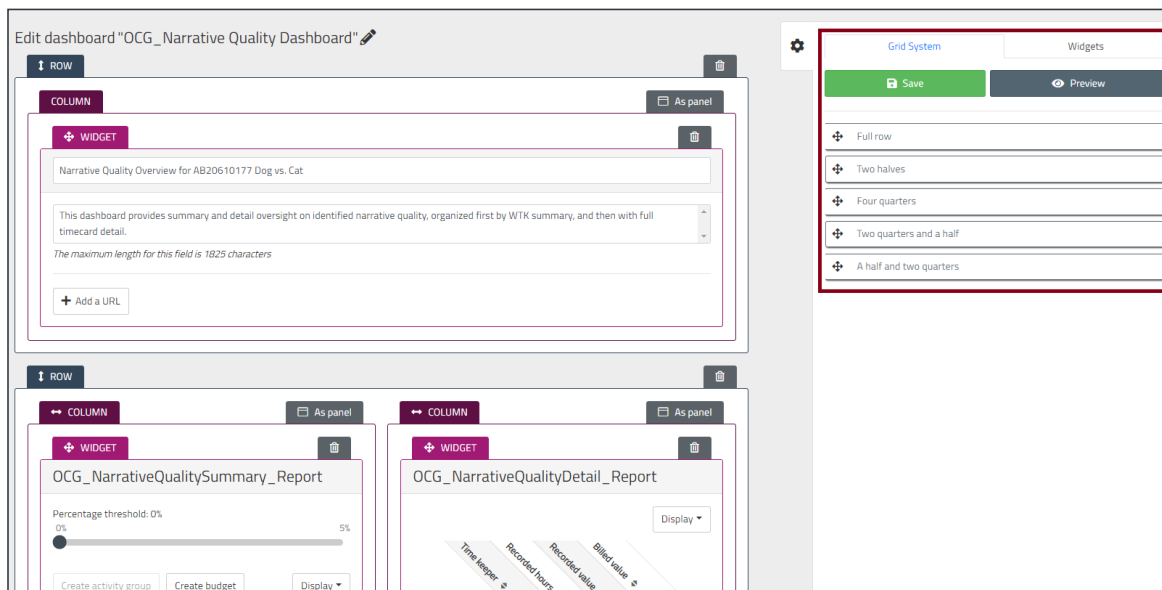
Where it may be helpful to concentrate a variety of reports in a single spot, for back office review or other administrative needs, consider using the Dashboard module. Clocktimizer's Dashboards can be created for global, role, or individual account use, and are customizable to match a law firm's needs and considerations.

In our example Dashboard, we've created a Narrative Quality overview for a sample matter, relying on our Narrative Quality reports, to concentrate information in a single space. As with the Budget and Drilldown modules, Email Updates can also be scheduled for Dashboard views.

Once you've named your Dashboard and assigned it an audience view, use a mix of the Grid System and Widgets to construct the space. For our example, we used a Full Row grid with the Text Widget to provide a title and byline to the dashboard. We next added a Two Halves grid to drop in our two Narrative Quality reports from Widgets: Detail and Summary.

Once done, hit Save to publish and review the Dashboard. Consider adding a Filter widget to interact with the Dashboard directly and zoom in on a particular timekeeper or period range. Dashboards are meant to be more than a visualization, but a concentrated repository for analysis and review.

## Example Narrative Quality Dashboard – Edit View



## Example Narrative Quality Dashboard – Published View

