

Lawyer ERP

Meeting Agenda with Andrew

Topics:

- 1. Default Privileges for Matter**
- 2. Time Sheet Approval**
- 3. DMS Email Integration**
- 4. Report Formats**

Default Privileges for Matters (Page No. 72):

- **Outline the default privileges for each matter type, defining user roles and privileges at the matter level (e.g., view, edit, file access, billing permissions) and handling for sensitive matters.**

Time Sheet Approval (Page No. 83):

- **Explain the time sheet approval process, noting approval cycles like weekly (user-based) or at billing (matter-based) and roles involved in influencing approval status.**

DMS Email Integration (Page No. 107):

- **Describe email management integration with DMS, detailing filing, threading, and de-duplication (emails marked as filed for all if received by a team and filed by one).**

Matter-Related Reporting (Page No. 78):

- **List matter-related report types: Utilization (efficiency), Realization (revenue vs. time), Profitability (revenue vs. expenses), Leverage (partner/associate ratios).**