TEAMCONNECT TRAINING COURSE CATALOG

END USER FUNDAMENTALS

The End User Fundamentals course provides participants with a strong foundation to navigate the TeamConnect interface comfortably and effectively. After completing the course, participants will have a fundamental understanding of the platform and how to navigate through the user interface. Attendees will learn how to view, create, delete, and modify records.

This course is designed for beginner level users and covers the basic knowledge required for all additional training courses. Users will learn how all of the different objects and records in TeamConnect can work together to produce and maintain information for the client's day-to-day legal operations.

Course level: Basic
Prerequisites: None
Delivery options: On-Site Training | Regional Training

SOLUTION ADMINISTRATION

The Solution Administration course prepares participants to design and manage TeamConnect solutions. After completing the course, participants will understand how to leverage many of TeamConnect's vast capabilities and options. Participants will also be able to implement common interface changes to meet the business needs of their legal departments.

This course is designed for business managers and legal operations administrators in charge of editing, managing, and maintaining TeamConnect for the end users. This course requires a level of knowledge equivalent to that attained in the End User Fundamentals course. Clients who complete this course will be able to manage the functionality of the TeamConnect interface for the end users of the system. The Solution Administration course is designed for intermediate level users, but it does not require outside knowledge of computer-based languages like XML or Java.

Course level: Intermediate
Prerequisites: End User Fundamentals
Delivery Options: On-Site Training | Regional Training | Self-Paced Web Training

CSM/COLLABORATI

This course prepares participants to manage the CSM to Collaborati integration. After completing the course, participants will have the knowledge to design and manage the collaboration between CSM and Collaborati, including the workflow approval routing, set up of CSM processes and settings and defining invoice validation rules.

Course level: Beginner
Prerequisites: End User Fundamentals
Delivery Options: Instructor-led Web Training

TEAMCONNECT REPORTING

This course provides attendees with an overview of TeamConnect Data Warehouse. It covers how to create, edit, and run reports In TeamConnect. Attendees will learn how TeamConnect Native Reporting works within the user interface.

Course level: Intermediate
Prerequisites: End User Fundamentals
Delivery Options: Instructor-led Web Training

TEAMCONNECT ADVANCED REPORTING

This course provides attendees with in-depth knowledge of the TeamConnect Native Reporting and an overview of the TeamConnect Data Warehouse. It covers basic reporting functions of creating, editing, and running reports.

Additionally, this advanced course covers the reporting enhancements of TeamConnect Enterprise 3.3 SP3/3.4+. Attendees will learn how data series from different record types can be combined using table joins as well as the additional grouping and sorting options of the report chart displays.

Course level: Intermediate
Prerequisites: End User Fundamentals
Delivery Options: Instructor-led Web Training

GUI RULES

This course covers TeamConnect rules available in the system. Users will learn how to navigate the GUI (Graphical User Interface) and create rules for different records in TeamConnect. This course covers all rules within TeamConnect that utilize tools available in the system. No outside knowledge or Java is required, and rules that use custom code will not be covered in this course. After completing this course, attendees will be able to create different types of rules to enable better security, keep records of changes made in TeamConnect, validate accurate records and data, create approval routes and workflows, and populate records with predefined information.

This material is included in the Solution Administration course.

Course level: Intermediate
Prerequisites: Solution Administration
Delivery Options: Instructor-led Web Training

DATA WAREHOUSE TECHNICAL KNOWLEDGE

This course will review the technical knowledge behind TeamConnect's Data Warehouse, how the data is stored, the data warehouse schema, and how to report from Data Warehouse.

Course level: Advanced
Prerequisites: Solution Administration, database query and design
Delivery Options: Instructor-led Web Training

ADVANCED RULES TRAINING

This course is designed to help system analysts convert an organization's business processes into rules for system and custom object records. This course provides the necessary information and background for students to begin designing and writing custom code for TeamConnect rules. Participants will be introduced to the concepts of rules, learn how to define and use rules, and learn about the TeamConnect API and necessary setup to begin using it.

Course level: Advanced
Prerequisites: Solution Administration, Java & object-oriented programming
Delivery Options: On-Site Training

CUSTOM JAVA BLOCKS

This course provides students with the skills to manipulate screens using custom java blocks. Students will learn how CJBs can change the look of screens. They will explore how to add actions to single fields or sections of the screen using this technology rather than using rules to modify the entire record. In this course they will review how to utilize the screen designer to create custom dropdown lists, display related objects in a table, and how to selectively hide or display fields in a screen.

Course level: Advanced
Prerequisites: Solution Administration, Java coding knowledge
Delivery Options: On-Site Training

DEVELOPER ADMINISTRATION

This course prepares participants to design and to write code for TeamConnect. After completing the course, participants will understand how to leverage many of the vast capabilities and customizations in TeamConnect. With an emphasis on thinking about the long term effects of code development, participants will be able to identify and to develop complex changes to meet the business needs of their legal departments.

Course Level: Advanced
Prerequisites: End User Fundamentals, Solution Administration
Delivery Options: Onsite Training

DOCUMENT GENERATION/EASY DOCS

This course provides attendees with the knowledge to use and create documents and templates within TeamConnect. After completing this course, participants will understand how to use document generator, how to create a document using the EasyDocs tool and how to navigate to retrieve the necessary information from TeamConnect.

Course level: Advanced
Prerequisites: Solution Administration, experience with HTML & XML
Delivery Options: On-Site Training

WEB SERVICES

This course will provide participants with the knowledge to use TeamConnect Enterprise's web services to create, update, read and delete the contact, project and invoice record in TeamConnect.

Course level: Advanced
Prerequisites: Solution Administration, Java and object-oriented programming
Delivery Options: On-Site Training