



D365 LEGAL HUB

QUICK START GUIDE

Dashboards

Track your work, time and billing

My Work • Timers • Billing • Time Keeper



d365.Global

Purpose of this guide

A short guide to the dashboards and time tools under My Work.

What this covers

My Activities, My Dashboard, time entries, My Timers and the **Billing, Matter** and **Time Keeper** reports.

Who should use it

Lawyers recording time, and **managers** reviewing billing and utilisation.

Recommended process

Record time **as you work**, then use the dashboards to check **hours, billing** and **progress**.

Important: billable time you save creates a **billing event**, which still needs approval before it is invoiced.

My Activities

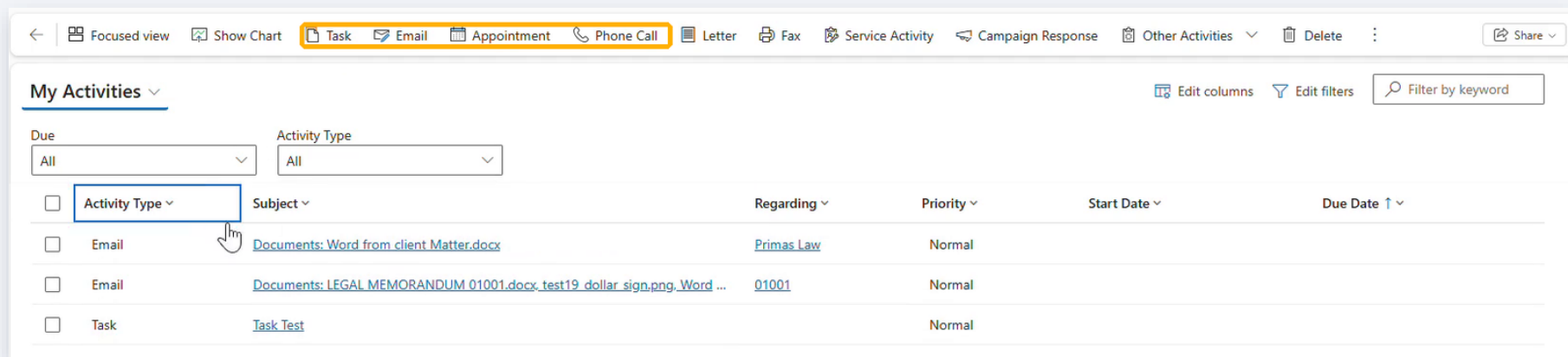
Your home page lists your **activities**.

Steps:

1. Open **My Activities** under **My Work**
2. Click **Email** to send an email
3. Create an **appointment**, phone call or task the same way

Note: Appointments sync with **Outlook**.

It shows emails, tasks and other activities. You can create new ones from the top action bar.



The screenshot shows the 'My Activities' interface. At the top, there is a navigation bar with icons for Task, Email, Appointment, Phone Call, Letter, Fax, Service Activity, Campaign Response, and Other Activities. The 'Email' icon is highlighted. Below this bar, the 'My Activities' section is visible. It includes a 'Due' dropdown set to 'All' and an 'Activity Type' dropdown set to 'All'. Below these are filters for 'Activity Type', 'Subject', 'Regarding', 'Priority', 'Start Date', and 'Due Date'. A list of activities is shown below the filters:

Activity Type	Subject	Regarding	Priority	Start Date	Due Date
Email	Documents: Word from client Matter.docx	Primas Law	Normal		
Email	Documents: LEGAL MEMORANDUM 01001.docx_test19_dollar_sign.png_Word ...	01001	Normal		
Task	Task Test		Normal		

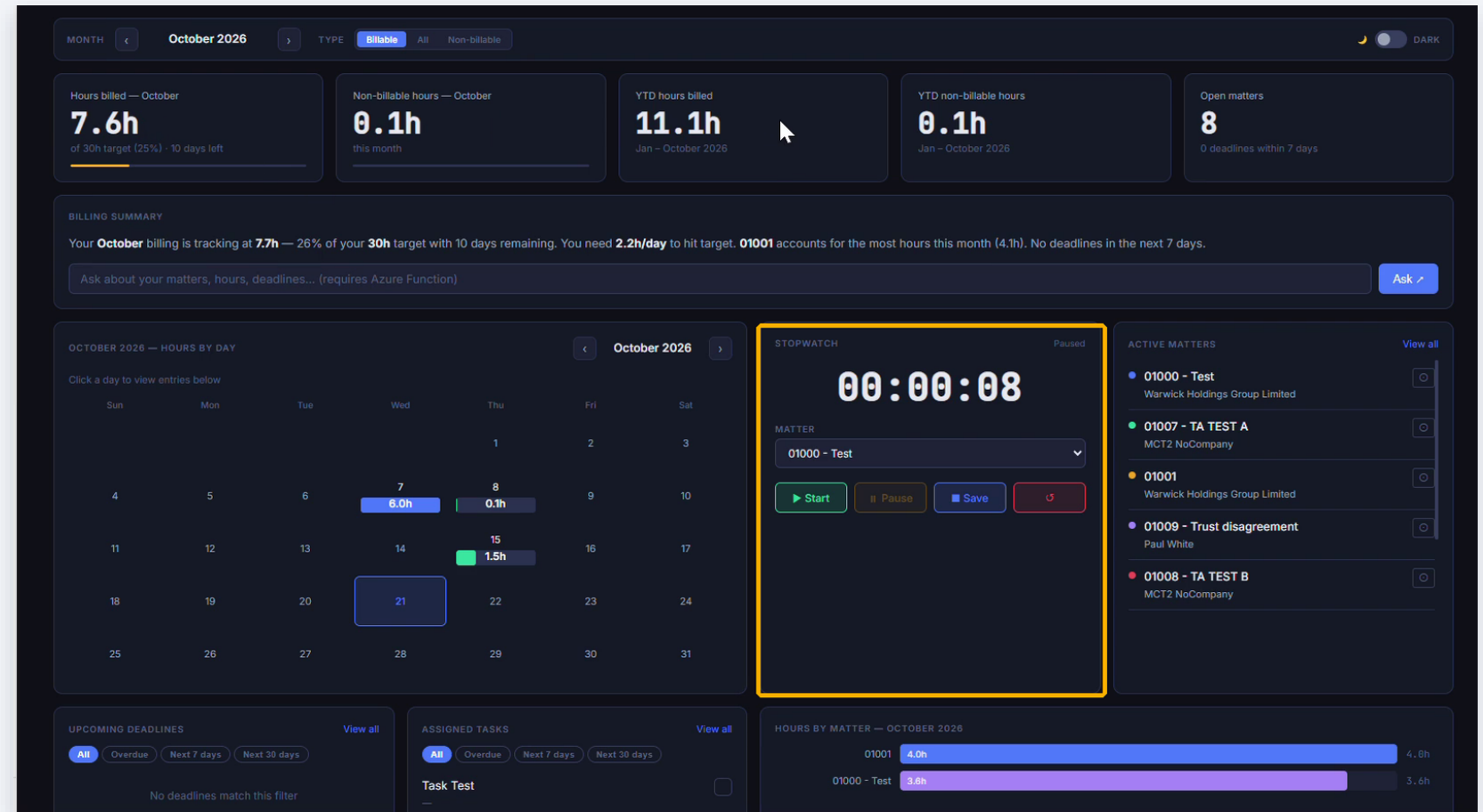
My Dashboard

Your hours and tasks at a glance.

Steps:

1. Open **My Dashboard**
2. Check the **hours** cards at the top
3. Click a day on the **calendar** to see its entries

It shows hours billed, non-billable hours, year-to-date totals, a calendar of daily hours and your active matters.



Stopwatch

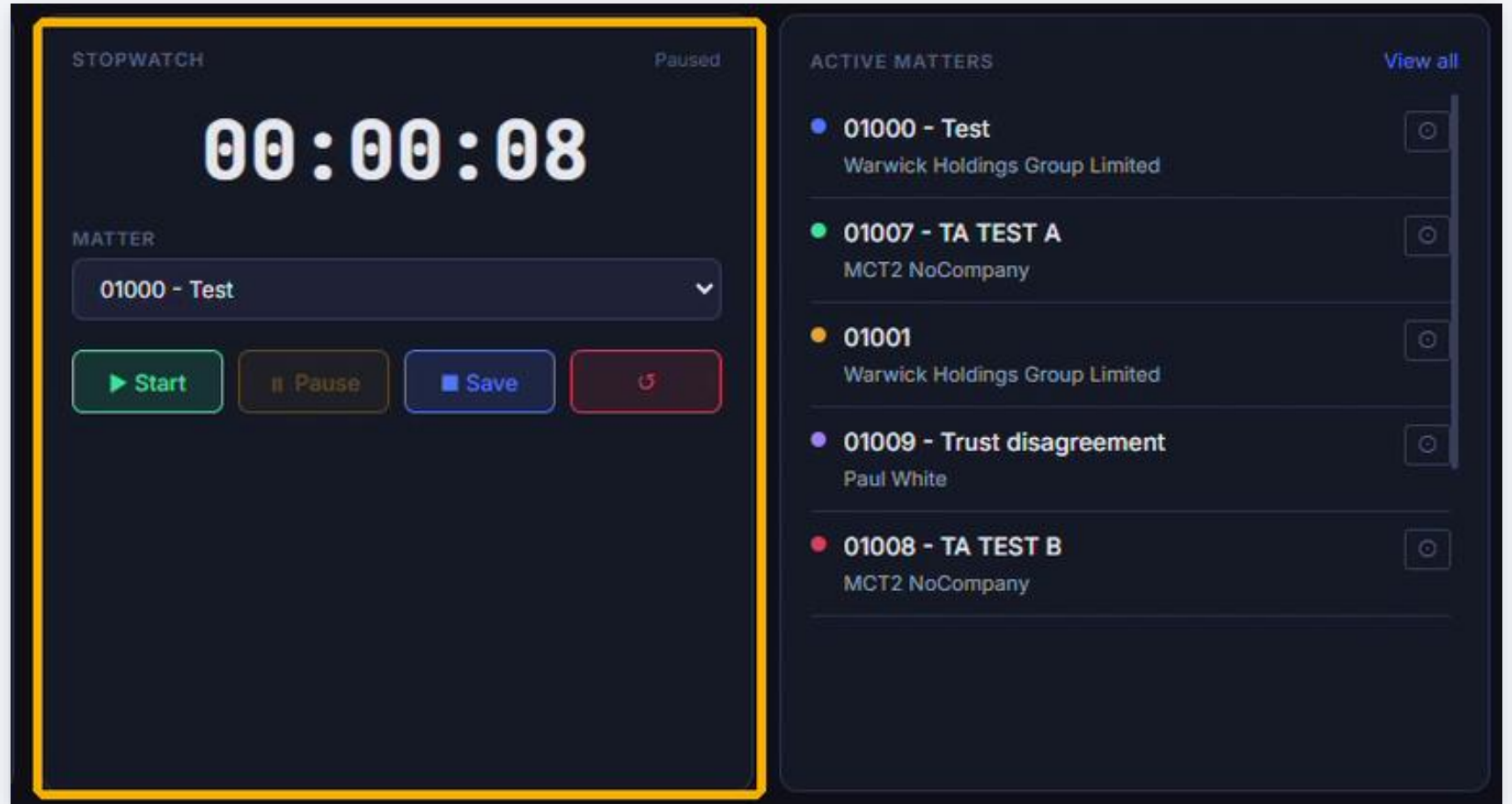
Time a task as you work.

Steps:

1. Select the **matter**
2. Click **Start**, then **Pause** when you stop
3. Click **Save** to record the time

Note: A time entry needs at least **0.1 hours**.

Select a matter and start the stopwatch. It keeps running even if you close the browser.



STOPWATCH Paused

00:00:08

MATTER

01000 - Test

Start Pause Save

ACTIVE MATTERS View all

- 01000 - Test
Warwick Holdings Group Limited
- 01007 - TA TEST A
MCT2 NoCompany
- 01001
Warwick Holdings Group Limited
- 01009 - Trust disagreement
Paul White
- 01008 - TA TEST B
MCT2 NoCompany

04

Add Time Entry

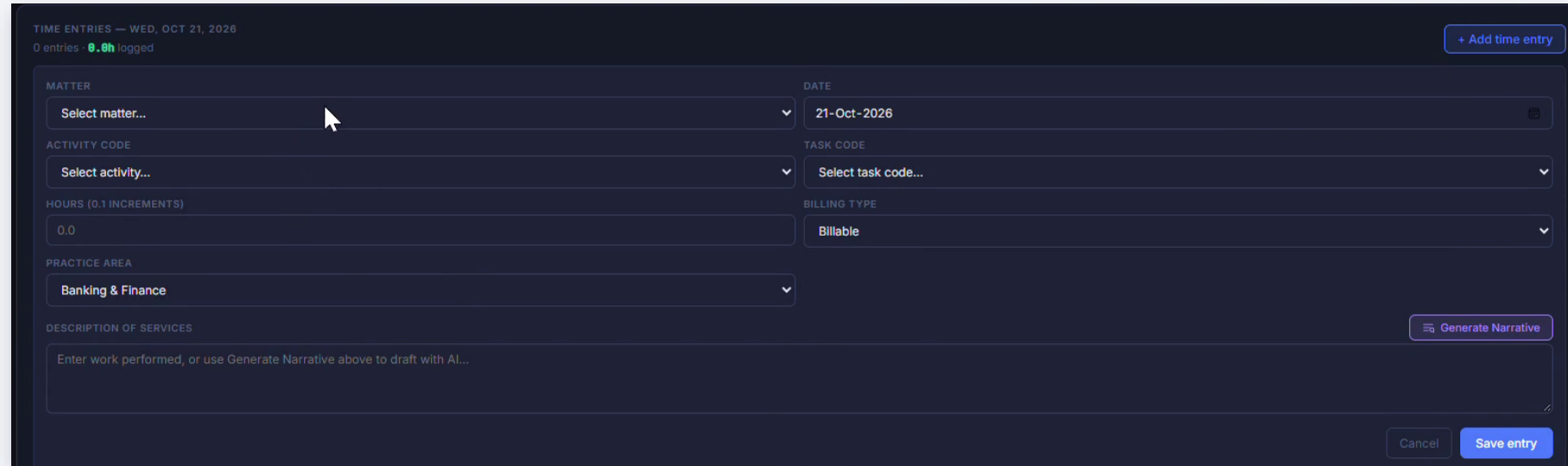
Enter time directly.

Steps:

1. Click **+ Add Time Entry**
2. Choose the **matter**, **activity code** and **task code**
3. Click **Save**

Note: A billable entry creates a **billing record** for approval.

Use **+ Add Time Entry** on My Dashboard to record time without the stopwatch.



The screenshot shows the 'Add Time Entry' form in a dark-themed interface. At the top, it says 'TIME ENTRIES — WED, OCT 21, 2026' and '0 entries · 0.0h logged'. A '+ Add time entry' button is in the top right. The form has several sections: 'MATTER' with a dropdown 'Select matter...', 'DATE' with a date picker set to '21-Oct-2026', 'ACTIVITY CODE' with a dropdown 'Select activity...', 'TASK CODE' with a dropdown 'Select task code...', 'HOURS (0.1 INCREMENTS)' with a text input set to '0.0', 'BILLING TYPE' with a dropdown set to 'Billable', and 'PRACTICE AREA' with a dropdown set to 'Banking & Finance'. At the bottom, there is a 'DESCRIPTION OF SERVICES' text area with a placeholder 'Enter work performed, or use Generate Narrative above to draft with AI...' and a 'Generate Narrative' button. 'Cancel' and 'Save entry' buttons are at the bottom right.

My Timers

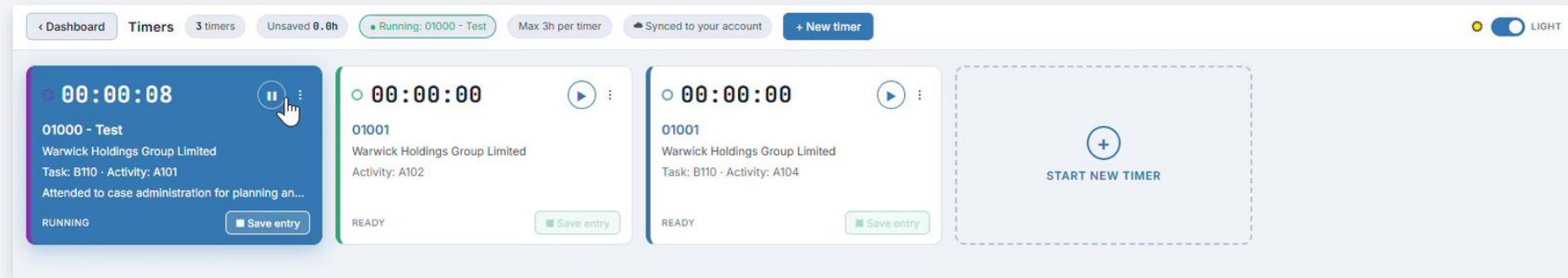
Keep a timer ready for each task.

Steps:

1. Open **My Timers**
2. Press **Start** on a timer to record, **Pause** to stop
3. Click **Save** and add the details to create the **time entry**

Note: A saved timer is removed from My Timers.

Timers let you run time against several matters and save each one when you finish.



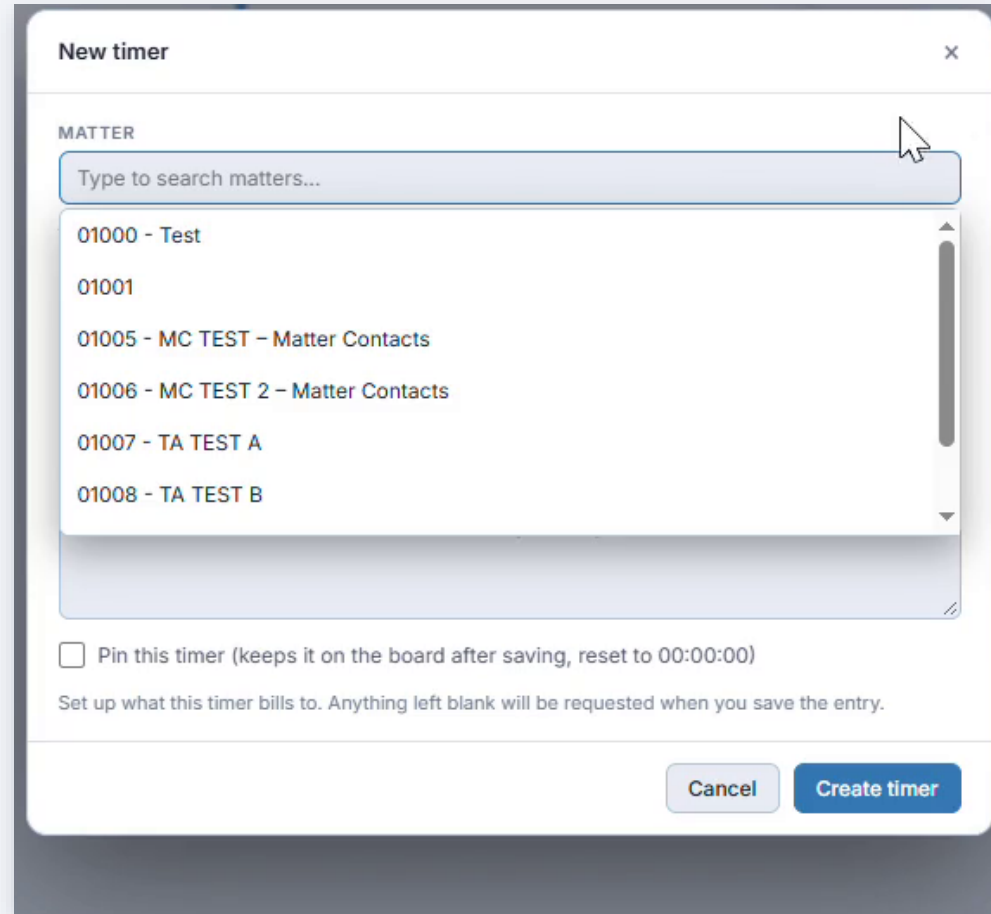
New Timer

Set up a timer for a task.

Steps:

1. Click **+ New Timer**
2. Choose the **matter**, **task code**, **activity code**, **practice area** and **colour**
3. Add a **description** and click **Create Timer**

Create timers for pending work, then start them when you begin.



New timer

MATTER

Type to search matters...

- 01000 - Test
- 01001
- 01005 - MC TEST - Matter Contacts
- 01006 - MC TEST 2 - Matter Contacts
- 01007 - TA TEST A
- 01008 - TA TEST B

☐ Pin this timer (keeps it on the board after saving, reset to 00:00:00)

Set up what this timer bills to. Anything left blank will be requested when you save the entry.

Cancel Create timer

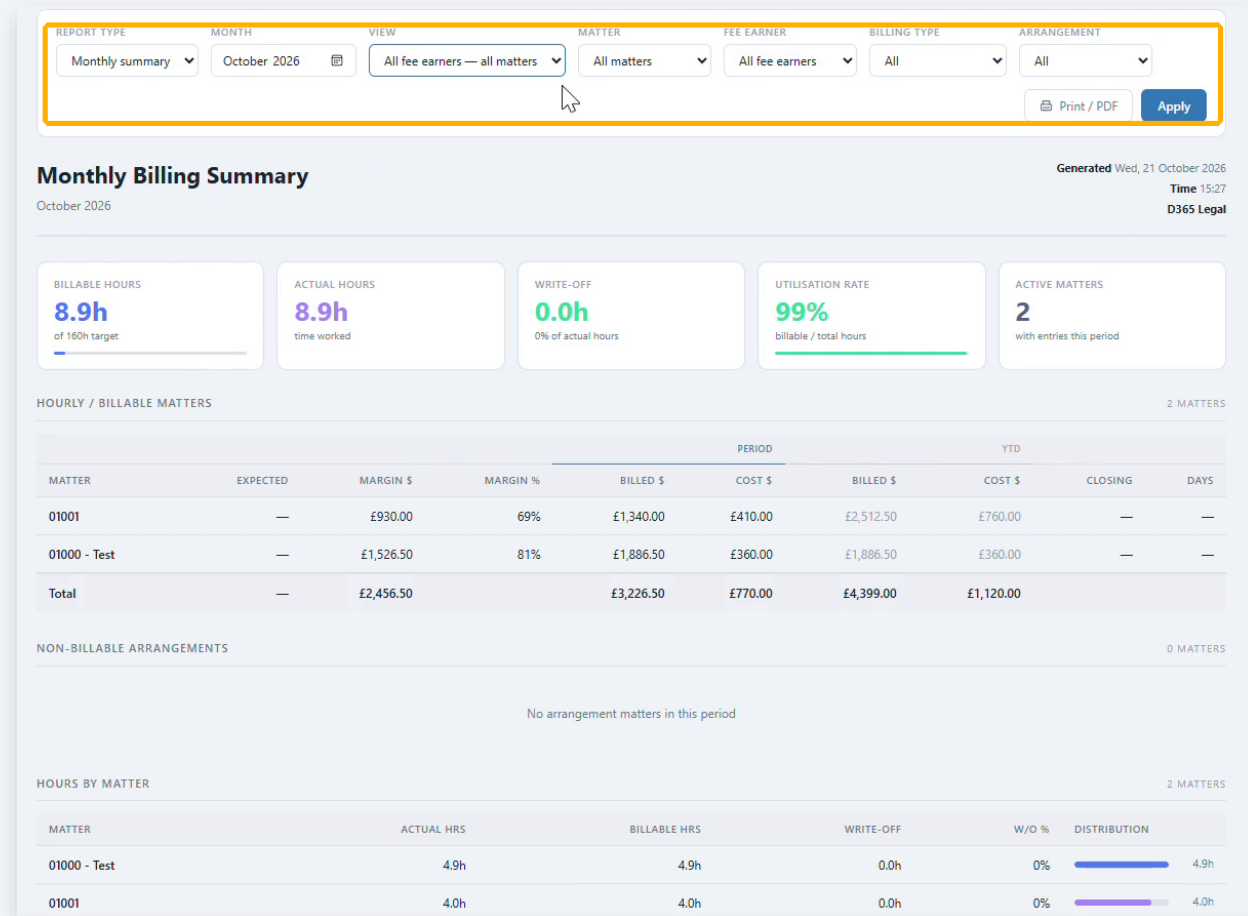
Billing Report

A monthly billing summary.

Steps:

1. Open **Billing Report**
2. Set the **month** and filters, for example **all fee owners**
3. Review the **hourly billable matters, margin and billed amounts**

Set the filters to see billing for the period you choose.



Matter Dashboard

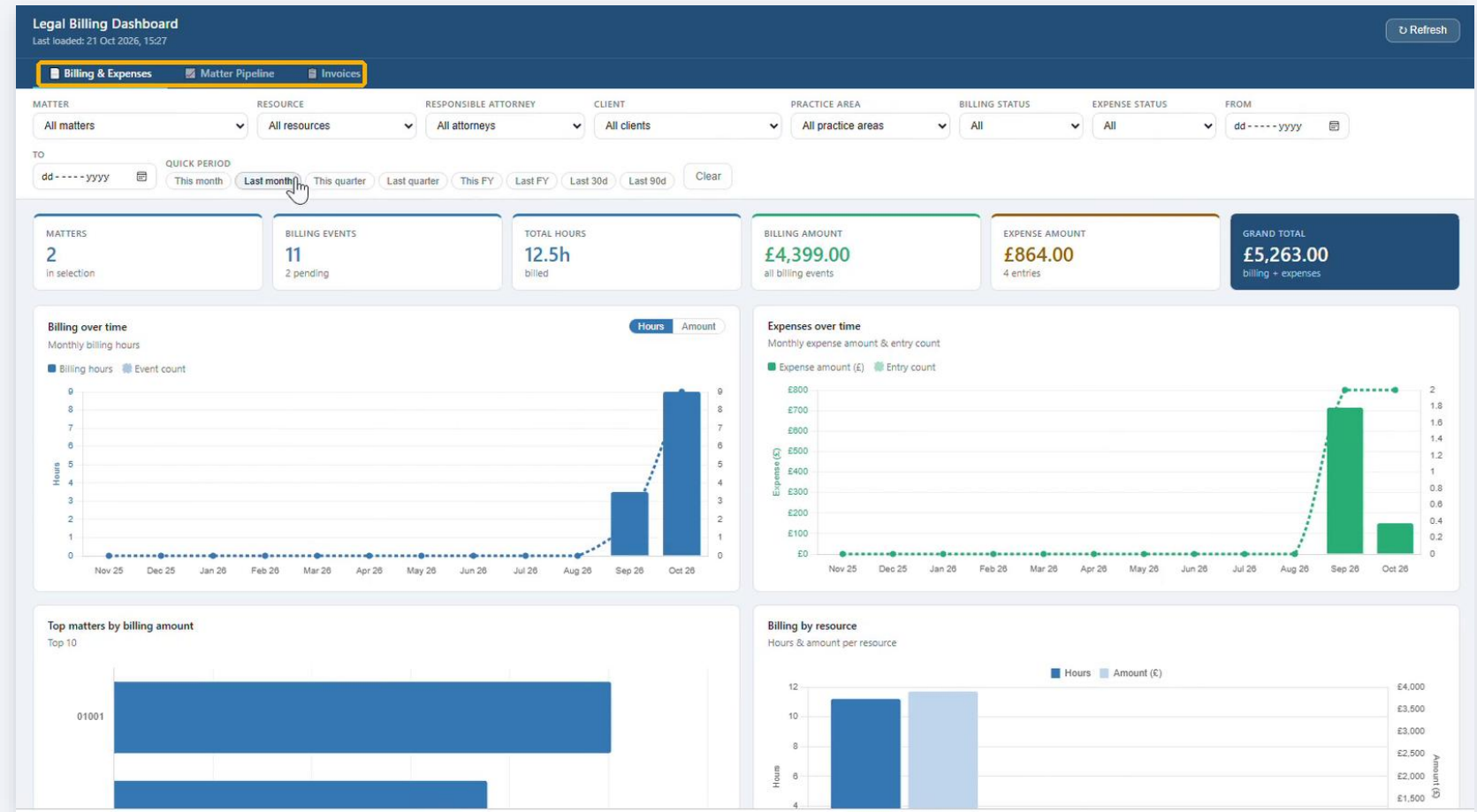
Billing details across your matters.

Steps:

1. Open **Matter Dashboard**
2. Use the **filters** to choose matters and dates
3. Click a **matter name** in the details table to open it

Note: Forecasts appear once there is enough data.

It shows totals for matters, billing events, hours and expenses, with charts by resource and a billing forecast.



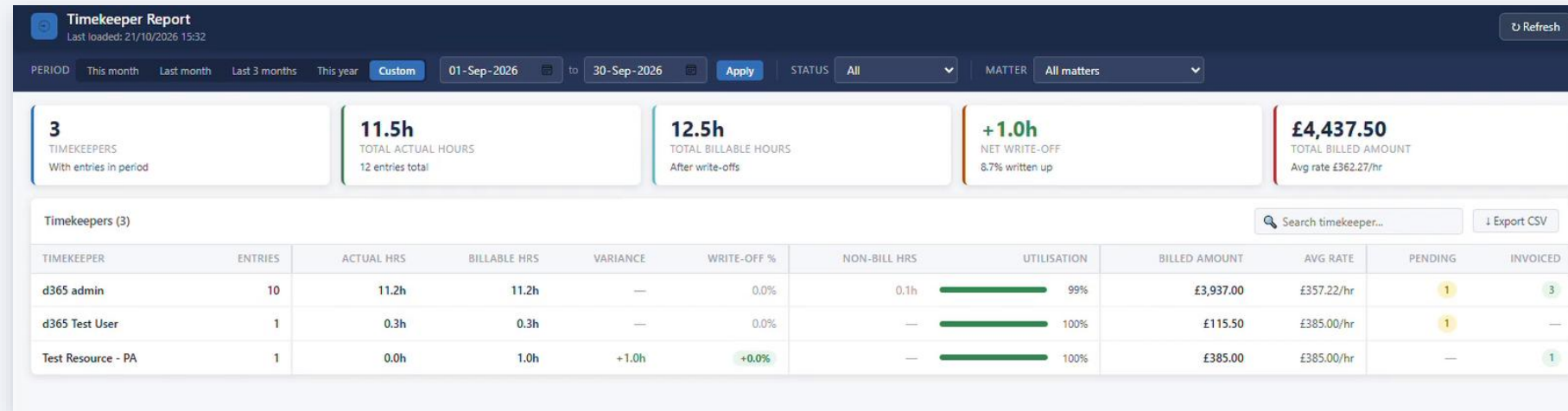
Time Keeper

Review hours by **timekeeper**.

Steps:

1. Open **Time Keeper Report**
2. Change the **filters** to see a different period or user
3. Compare **actual**, **billable** and **non-billable** hours

It compares actual and billable hours, utilisation, billed amount and rate for each user.



Tips for Dashboards and Time

Three things worth remembering.

Time as you go

Use the **stopwatch** or a **timer** so hours are recorded while you work.

Billable or not

Only **billable** entries create a billing record for invoicing.

Change the filters

Every dashboard and report can be **filtered** to show the data you need.

Need help? Contact **d365.Global** if a dashboard shows no data or a figure looks wrong.