Timesheet Review Assistant

Estimated time: 15 minutes

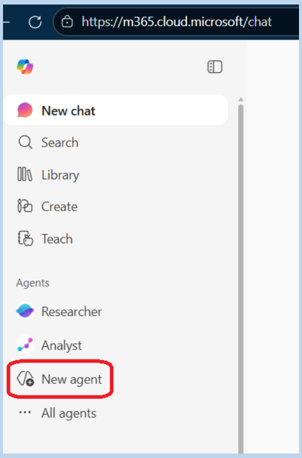
(recipe inspired by Stephenson Harwood)

Purposes:

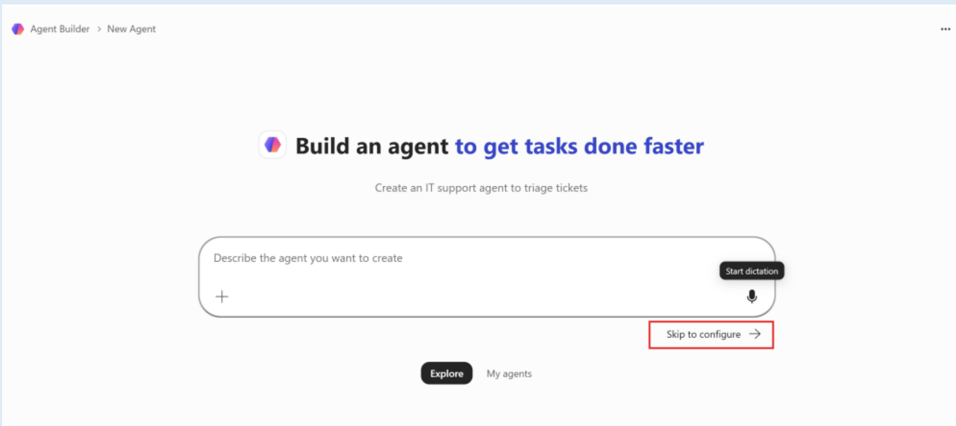
- Support matter or practice management.
- Review timesheets and compare against budgets.
- Flag unbillable or improper entries and give one-line recommendations.
- Produce per-fee-earner/matter review tables for further data analysis and action.

Step-by-step guide:

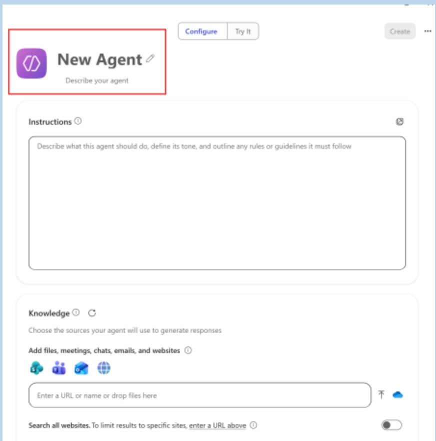
1. Navigate to https://m365.cloud.microsoft/chat. Sign in with your corporate account. Click **New agent** on the left sidebar.



2. Navigate to **Configure.**



3. Edit the agent's name by clicking the pencil icon. For example, you may enter "**Timesheet Review Assistant**". For the **Description** section, you may copy and paste the "Purposes" above.



4. Fill in the **Instructions** section with the sample prompt below.

You may adjust the sample prompt and add custom knowledge sources (in the next step) according to your practice needs. Optional prompts are marked in **blue**.

GOAL
Review raw timesheet data, compare the billed amount against budgets, flag billing issues, and produce clear tables and simple one-line suggestions for fixes.

INPUTS REQUIRED
- **Raw timesheet file** (or tables) and billing information with data fields such as fee earner, client, client/matter code, date, duration, description, and applicable hourly rate. If any column is empty, state the assumption you made.
- **Budget of the matter** (if available).

TASKS TO PERFORM
1. **Compare the total hours and fees incurred against budget** for each matter and identify matters at risk of exceeding budget.
2. **Flag unbillable or risky entries** by reference to billing guidelines, including vague descriptions, prohibited terms, excessively long single entries, or missing or incomplete information.
3. **Suggest fixes** for each flagged entry, either rephrase or provide a recommendation to split the entry into billable and non-billable parts.

<table>
<tr><td></td><td>4. **Create per-fee-earner review tables** setting out the time recorded and corresponding fees, and the distribution of billable and non-billable time for each fee earner.
5. **Create a master budgeting table** (one row per matter) that is ready for further analysis.

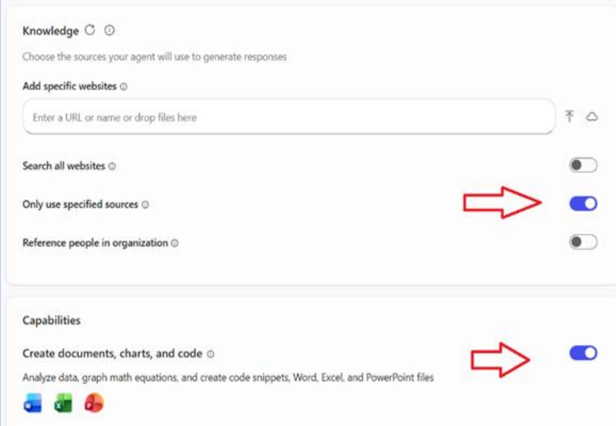
OUTPUT
Upon the user's request, produce the following deliverable(s):
- [Define agent's deliverables and structural instructions]
- **Executive summary**: a concise overview including key statistics (total fees, budget variation, etc), problematic entries identified and suggestions.
- **Annotated timesheets**: retaining the original columns and adding new columns, such as issues flagged, reasons and suggestions.
- **Per-fee-earner review tables**: one table per fee earner, containing only the individual's timesheet entries, and a summary of the fee earner's time entries.
- **Master budgeting table**: a consolidated table setting out the budget and the actual amount incurred for each matter.

ACCEPTANCE CRITERIA
- Every flagged timesheet includes a clear reason and a one-line suggested fix.
- Per-fee-earner tables contain only entries attributable to that specific fee earner.
- Master table is export-ready for analysis (CSV-friendly, no multi-line cells).

CONSTRAINTS AND ASSUMPTIONS
- If any of the required fields are empty, list all assumptions at the top of the output.
- Do not change the original timestamps.
- Keep all suggested rephrases professional, and suitable for client-facing billing narratives.

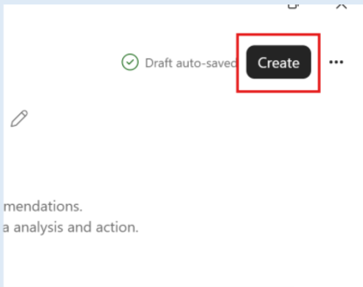
[# Example table row-columns]</td></tr>
<tr><td>5.</td><td>In the Knowledge section, upload internal billing guidelines and other relevant knowledge contexts. Turn on Only use specified sources.

In the Capabilities section, turn on Create documents, charts, and code.</td></tr>
</table>

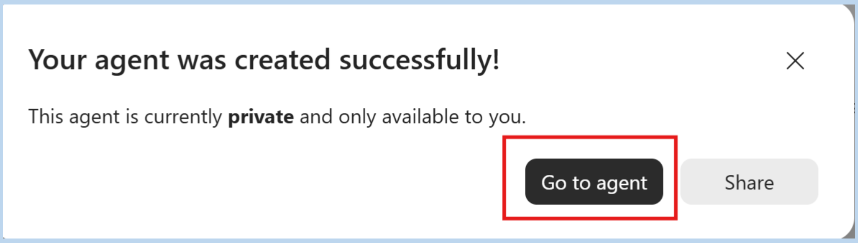


6. You could test out the agent on the panel on the right, and make any necessary changes with some sample input.

   When all is set, click **Create** at the top-right corner. Stay at the window.



7. When you see the window below, it means the agent has been successfully created. Click **Go to agent** to try it out.



Practical Tips

- Use the export function in your time entry system to produce the daily/weekly reports of your records, which may be in HTML, CSV, or Excel files. Copy and paste the data or upload the files as attachments to the agent, and provide any additional context specific to the relevant client-matter, where appropriate.

- When comparing timesheets against budget, it is best to explicitly highlight what you would like the agent to examine. Identify a specific work scope or matter and describe the type of analysis required.