THOMSON REUTERS LEGAL TRACKER

CHECKLIST

CHANGING THE TRACKER COORDINATOR

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THOMSON REUTERS®

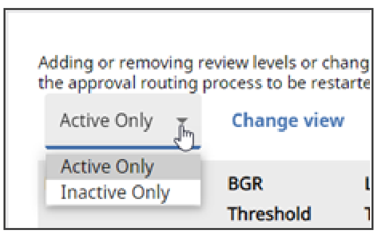
CHANGING THE TRACKER COORDINATOR | CHECKLIST

INVOICE APPROVAL ROUTES

1. Select **Settings** in the left navigation.

2. In the **eBilling & Financial Setup** section, select **Invoice Approval Routes**.

3. Click on each route name and update the route. Be sure to update both active and inactive approval routes. Use the dropdown to select **Active Only** or **Inactive Only** from the drop-down menu, then click **Change View**.



TIMEKEEPER RATE REVIEWERS

1. Select **Settings** in the left navigation.

2. In the **eBilling & Financial Setup** section, select **Timekeeper Classifications, Rates, and Reviewers**.

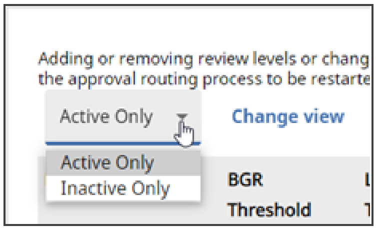
3. If the Tracker Coordinator you want to remove is listed in the Rate Reviewers grid, select the **Remove** button to the far right of their name.

AP ROUTES

1. Select **Settings** in the left navigation.

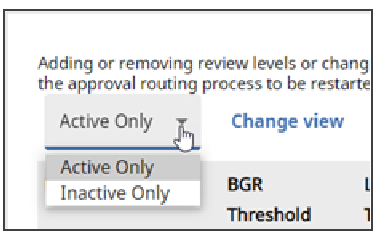
2. In the **Accounting and A/P Settings** section, select **AP Route Configuration**.

3. Select each AP route and update the AP route managers. Be sure to update both active and inactive approval routes. Use the dropdown to select **Active Only** or **Inactive Only** from the drop-down menu, then click **Change View**.



SERVICE OF PROCESS SETTINGS | USERS

1. Select **Settings** in the left navigation.
2. In the **Integrations** section, select **Service of Process Configuration** > **Service of Process Configuration**.
3. If the Tracker Coordinator you want to remove is listed in the **Default SOP Intake Users** list or the **SOP Escalation Users** list, select the **Remove** button to the far right of their name.
4. If there are SOP Types that route to specific users instead of intake users return to the Service of Process Configuration page and select **Service of process type list**.
5. Click each SOP Type name to update it. Be sure to update both active and inactive approval routes. Use the dropdown to select **Active Only** or **Inactive Only** from the drop-down menu, then click **Change View**.



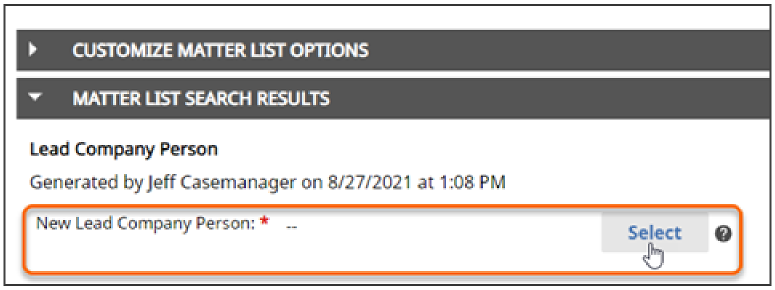
MATTERS PARTICIPATION

Use Bulk Update to replace former Tracker Coordinator in all matters where they are listed as the Lead Company Person.

1. Select **Matters** > **Bulk Update** in the left navigation.
2. Select the matters to update. **Tip** | To avoid missing anything, check the **All Company Matters** button.
3. Under **Step 2: Select a field to update**, use the dropdown to select **Lead Company Person**.

4. Select **Generate List**.

5. Click the **Select** button next to **New Lead Company Person** at the top of the list.



6. Select the replacement person to update these matters. There are two ways to find the person's name:

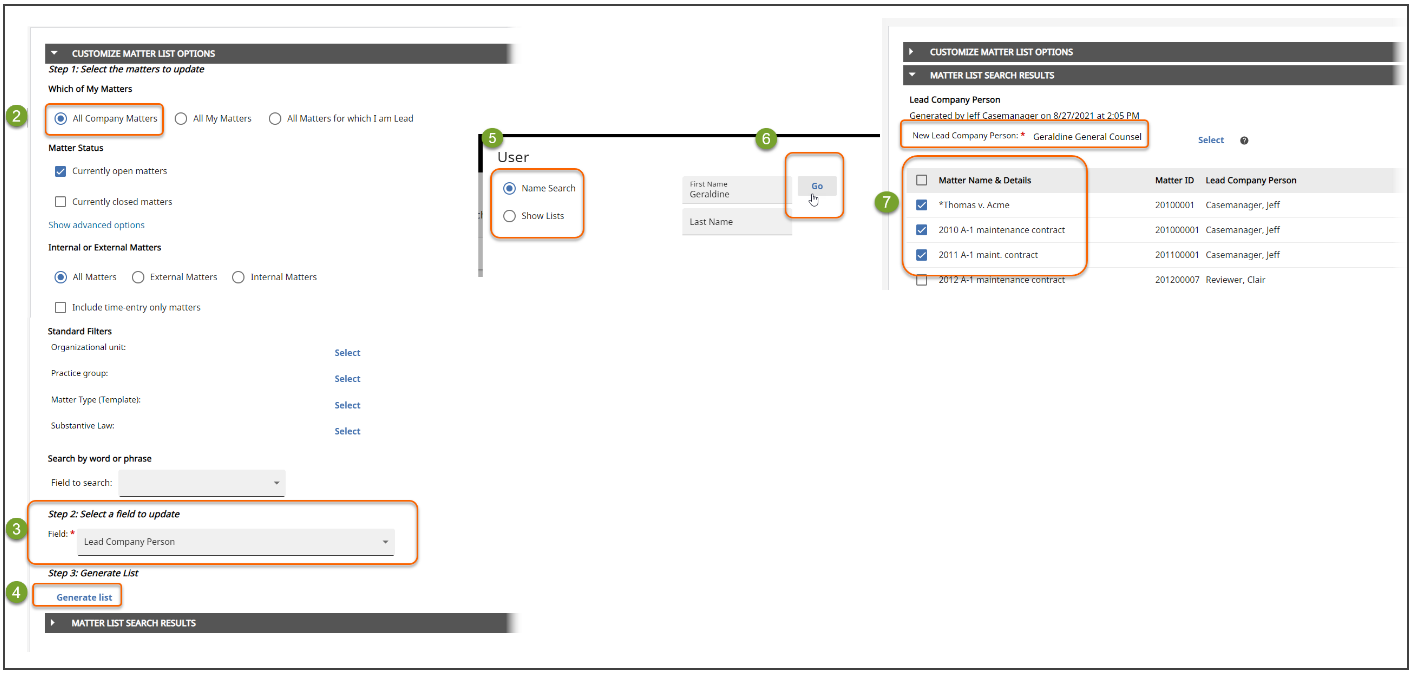
   - Select the **Name search** button and type the person's name into the **First Name** and **Last Name** fields, then select **Go**.

   - Select the **Show lists** button and select the **Go** button. Click the new person's name in the list.

7. Scroll through the list and check the boxes next to each **Matter Name & Detail** where you want to swap out the former Tracker Coordinator.

   This may take more than one pass if you want to swap in different people for specific cases, instead of putting in a new user across matters.

Tip | This same process could also be used to update #2 Company Person across multiple matters if necessary.



OFFICE / REGION TRACKER COORDINATOR

1. Select **Users** > **Office List** from the left navigation.
2. Click each office name where the former Tracker Coordinator is listed as Office/Region Tracker Coordinator or backup and update.

REPORTS

Have the current Tracker Coordinator share any reports that they have saved as their personal reports so that the new Tracker Coordinator won't have to recreate them. After the current Tracker Coordinator leaves, their reports will be held in an inactive user account. If the reports were not shared, it will be necessary to contact Tracker Support to help retrieve them.

1. Select **Reports** > **Report List** in the left navigation and look at any scheduled reports.
2. To the far right of a scheduled report (any report that has some data in **Schedule** column) select the three small dots , then select **Schedule**.
3. Update the **Email To / CC** fields if nececessary.

ASSIGNING THE TRACKER COORDINATOR

1. When you are ready, you can update the current Tracker Coordinator in one of two ways:
   - Select **Users** > **Company Profile** in the left navigation, *or*
   - Select **Settings** in the left navigation, then select **Company Settings** (in the **Company Setup** section)
2. Select **Edit company profile** on the toolbar.
3. To the right of the **Tracker Coordinator** field, use the **Select** button to find the new Tracker Coordinator.

Tip | See Assigning a Tracker Coordinator for details.

Tracker will ask for a confirmation to proceed when you make this change. If the new Tracker Coordinator does not have a system role of System Administrator, the system automatically updates their role.