## Legal Tracker
Updated UI Introduction

Get to know the new Tracker interface

Tracker is getting a new look. We've wrapped our proven and effective workflows in modern navigation and a fresh, thoughtful design to create a better, more consistent user experience. This interface update guide will help you find your way around in Tracker by showing you what's changed (and what hasn't).

IN THIS GUIDE

the answer company™
THOMSON REUTERS®

What's changed?

When you switch on the updated Tracker interface, you'll notice a few differences right away. You'll also quickly see that these changes are more about how Tracker looks and where things are, rather than how it works.

- Modern visual design with higher-contrast colors
- Slide-out navigation for the main menus, tabs, and global icons
- Actions menu options moved to page toolbars
- Quick navigation links
- Easier-to-read and configurable data tables
- Page-level usability improvements

What hasn't?

While you'll see new visual and navigation elements on all Tracker pages, changes in the workspace will vary by page and over time as the design is adopted for new features.
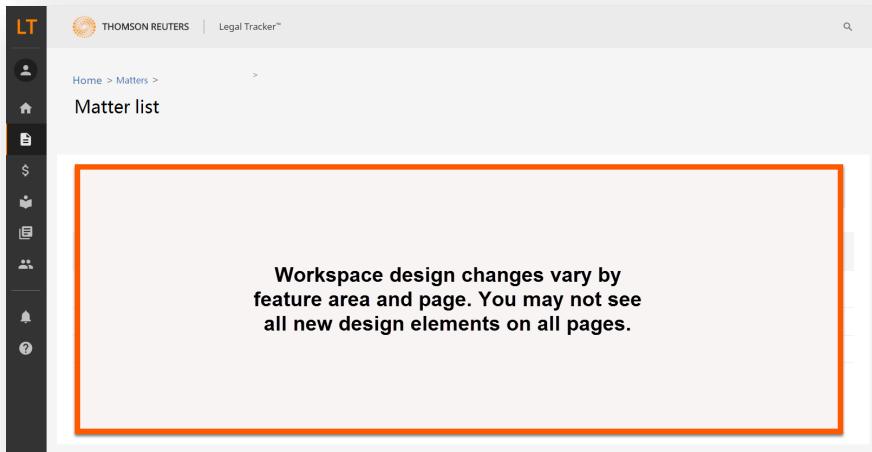
the answer company™
THOMSON REUTERS®

Changes at a glance

MODERN VISUAL DESIGN

New colors, text styling, icons, and other updated design elements give Tracker a clean and modern look that makes it easy to find, read, and understand information.

REQUIRED FIELD INDICATORS

Required fields are now indicated with asterisks instead of chevrons—red for hard required, gray for soft.

by

MAIN MENUS AND ICONS IN SIDE NAVIGATION

Tracker's main menus and global icons have moved to a slide-out side navigation panel, which keeps features you use often close by, but out of the way until you need them. Moving your pointing device over the panel expands it to enable menu selection. Moving the pointer off the expanded panel collapses it.

Side navigation collapsed
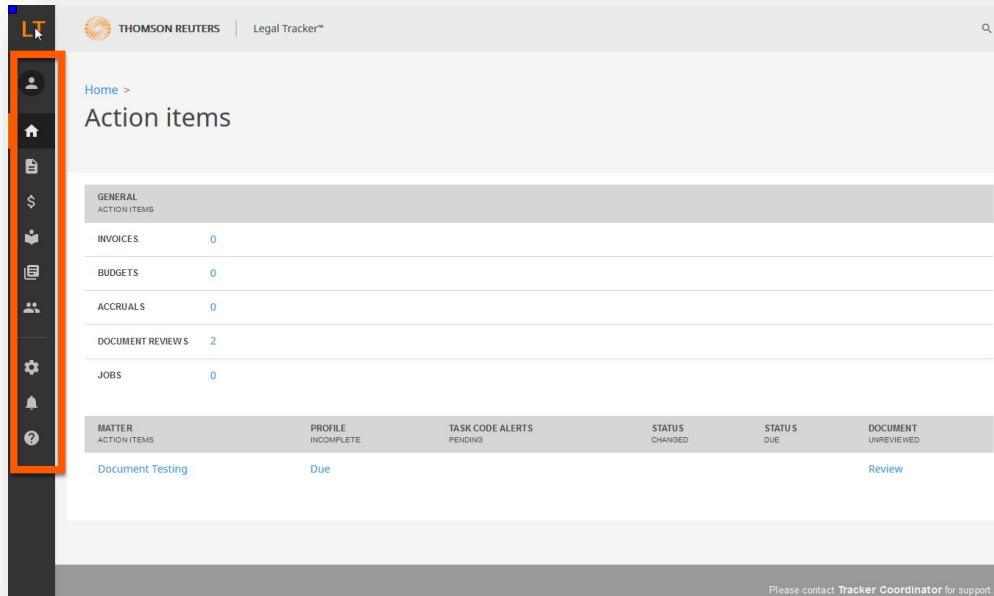
Side navigation expanded

the answer company™
THOMSON REUTERS®
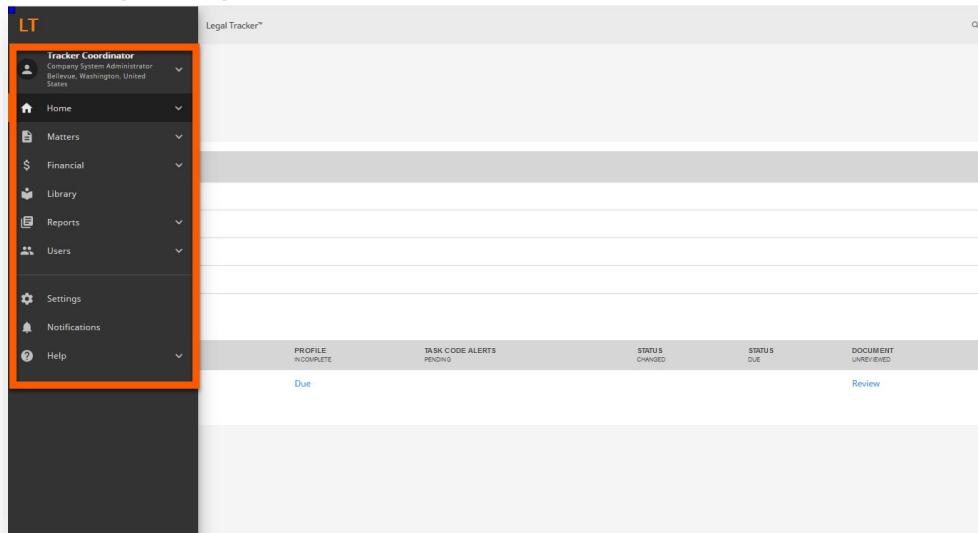
SIDE NAVIGATION COMPONENTS

Top-level menu names and icon actions haven't changed—now you'll just see them in side navigation. Global search is still at the top of every main Tracker page.
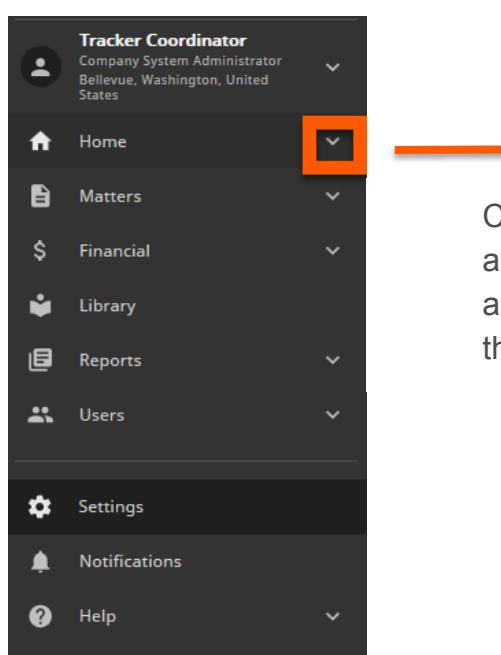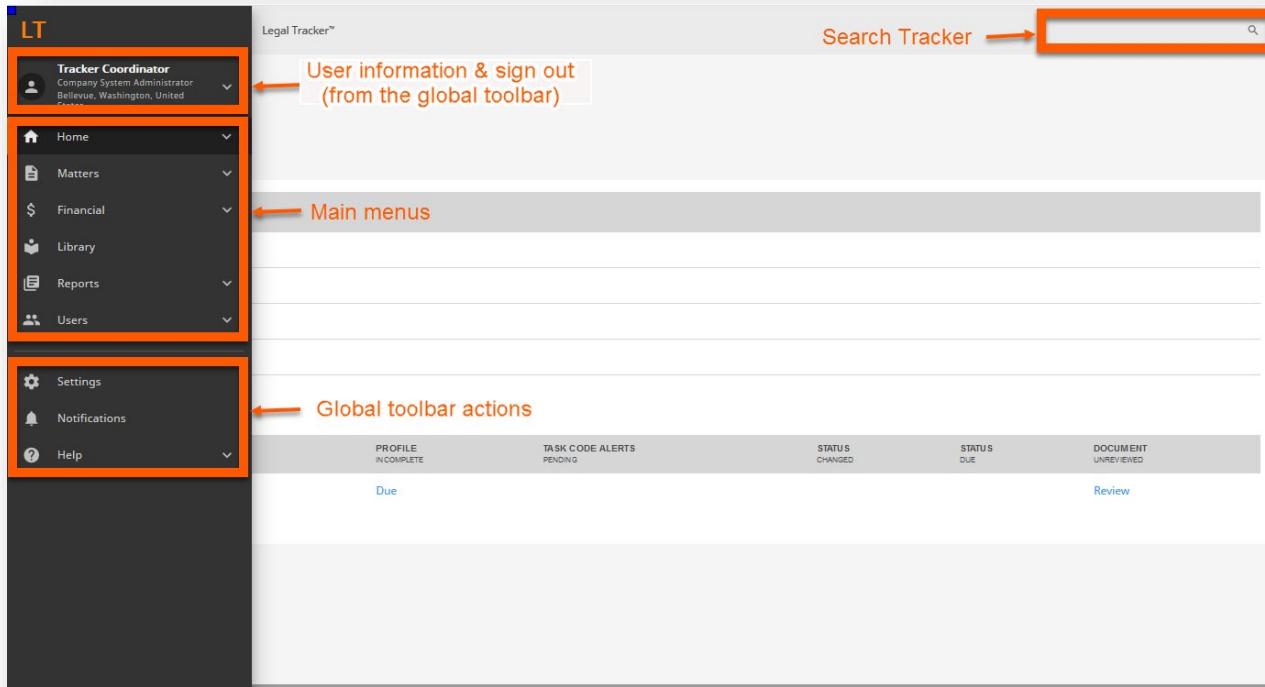
Clicking the arrows opens and closes the menus.

the answer company™
THOMSON REUTERS®
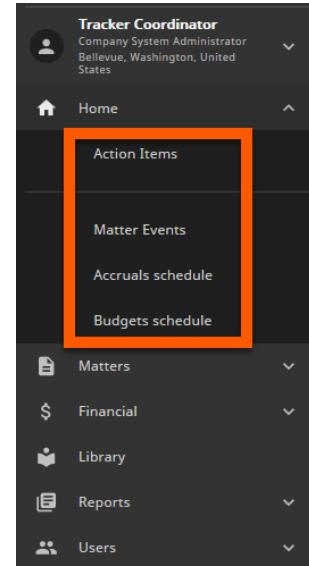
ACTIONS MENU OPTIONS ON PAGE TOOLBARS

The Actions menu is gone, but you'll find the same actions (some with slightly different names) on modern page toolbars that keep your focus on the workspace. All actions you can complete for a page are now on these toolbars, which display directly above the main page workspace.

PAGE TOOLBAR "MORE" MENU

We show the most commonly used page actions directly on the toolbar. If more actions are available, you can click the ellipsis to see a More menu.
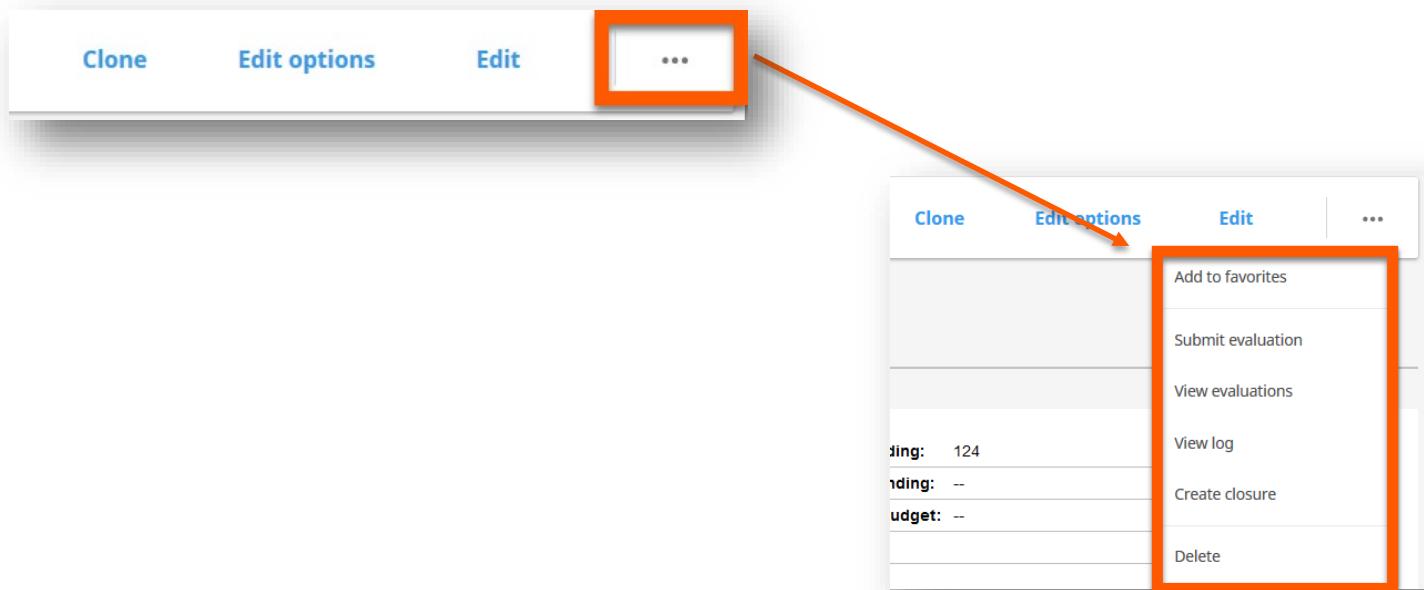
QUICK NAVIGATION LINKS

We're adding quick navigation links to every page as a reminder of where you are in Tracker, and to provide 1-click access for where you might need to go next.

the answer company™
**THOMSON REUTERS®**
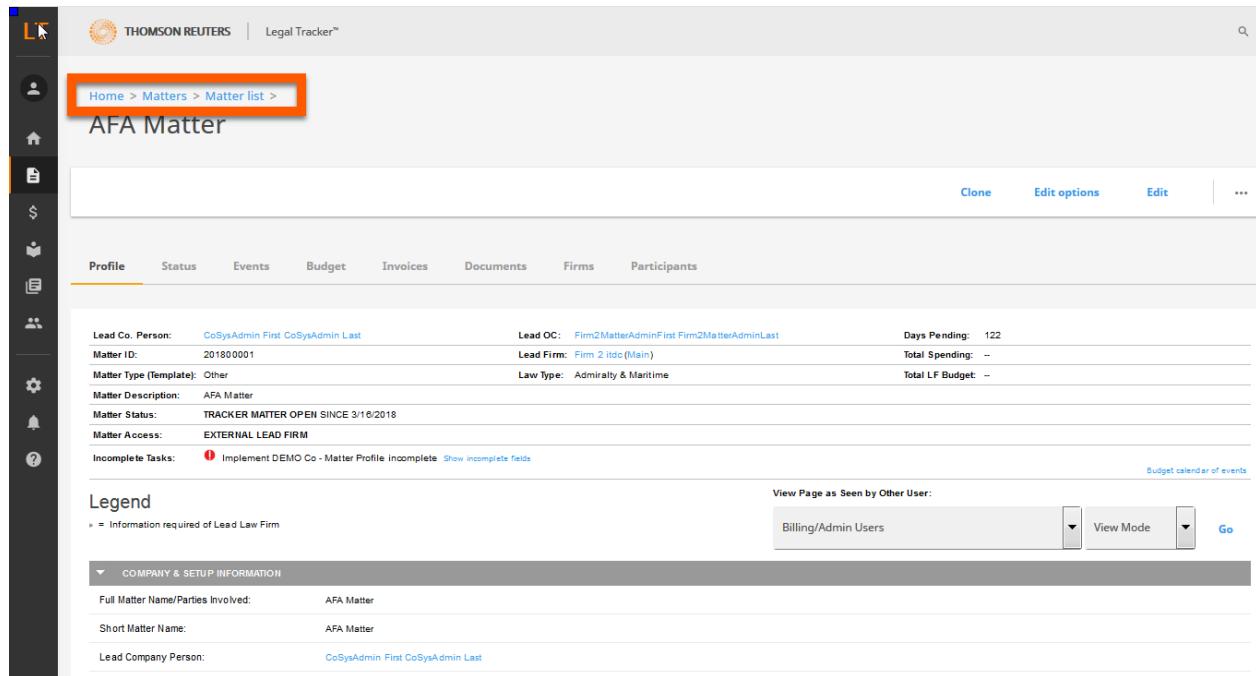
PAGE USABILITY IMPROVEMENTS

As you interact with the updated interface to complete your usual workflows, you may notice a few small changes that have big usability impacts.

Raised buttons

On page toolbars, raised buttons indicate the recommended action (if there is one), or one that is required to save changes, based on the activity you're completing.
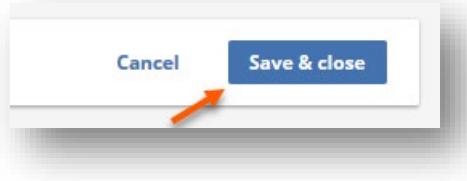

Notification bars

Informational, warning, and error alerts display on color-coded notification bars at the top of the page, so you always know where to look.
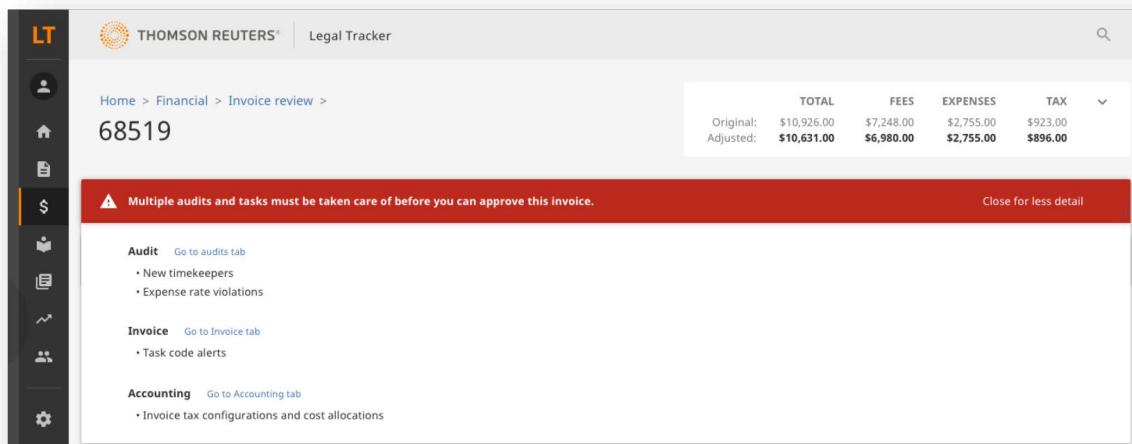
Accent bars

Accent bars provide a visual indicator of the active menu or tab in a group.

the answer company™
THOMSON REUTERS®
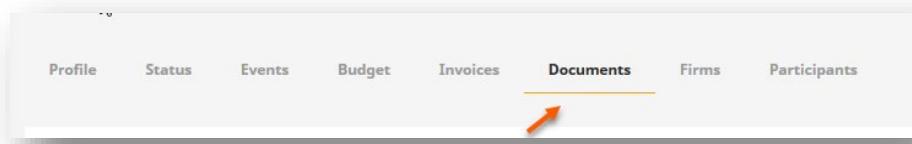
Configurable data tables

We're giving you more control over how you want to see data in list views, and on other pages that present information in tables with columns and rows.

Additional data is stored in configurable drawers, which open and close when you click the arrow at the end of a row.

Columns can be reordered by dragging column headings.

Columns and drawers are both configurable. Clicking the ellipsis in the heading row opens a settings window, where you can select the data you want to see (or not see) in columns and drawers.

the answer company™
THOMSON REUTERS®

Where to find things

Now that you've seen what's changed, let's look at where to find things.

ENHANCED USER INTERFACE SWITCH

Until the updated interface is rolled out for all companies, the enhanced interface can be enabled as a company user preference or company setting.

As a user preference

Enabled by company users in Preferences.
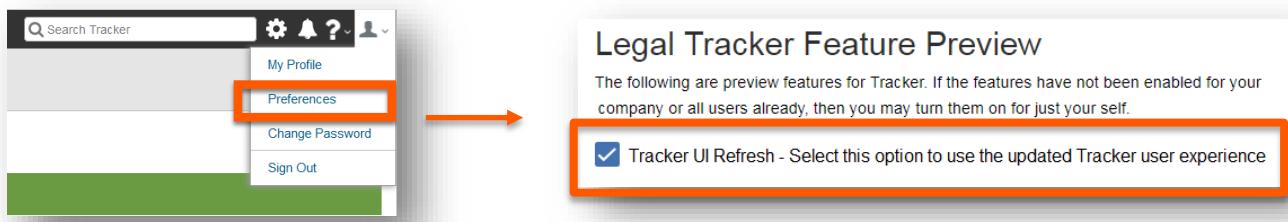
As a company setting
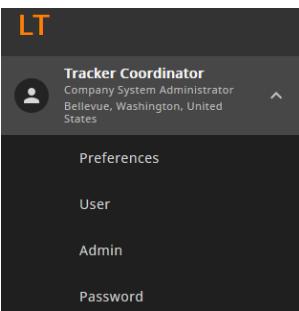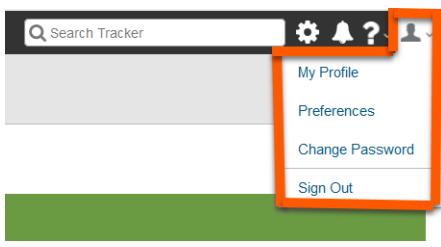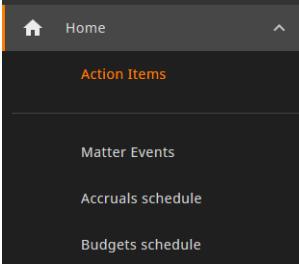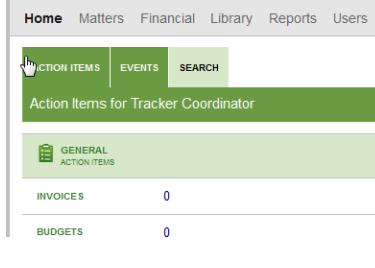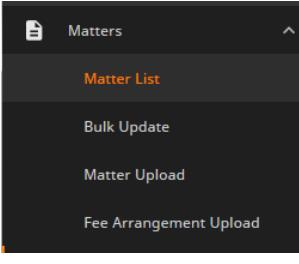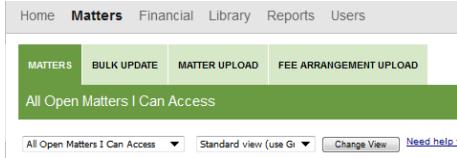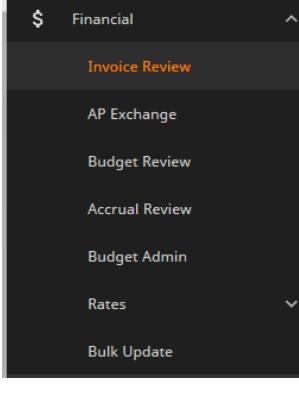
Enabled by a Tracker Coordinator or Company System Administrator in Tracker Setup > Features Setup.
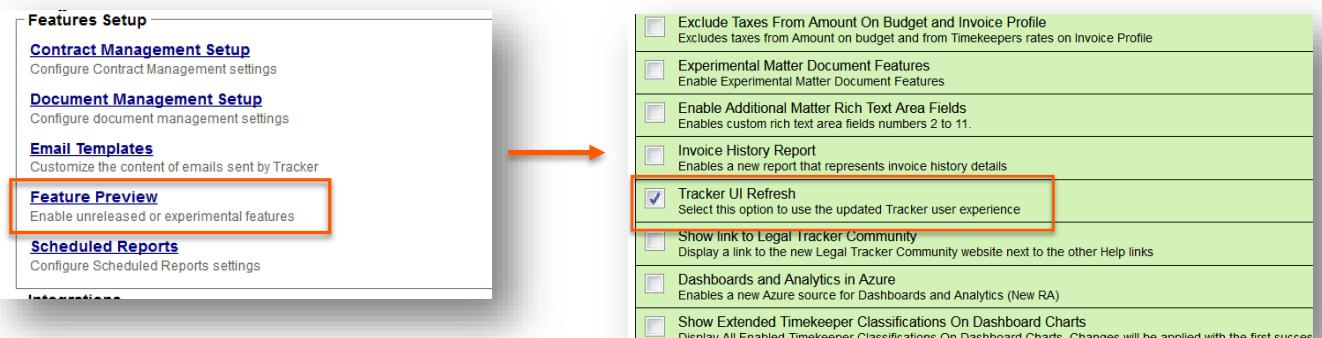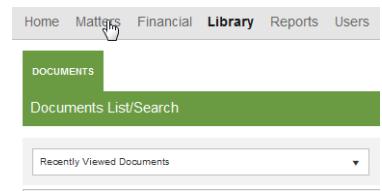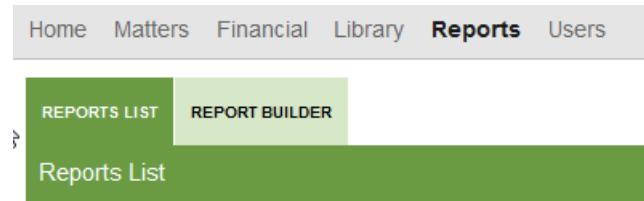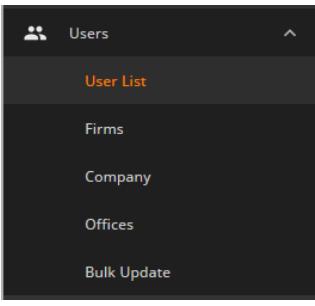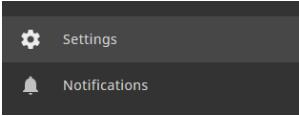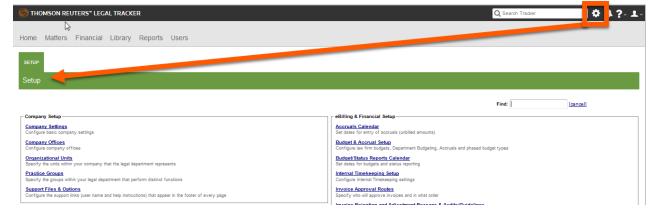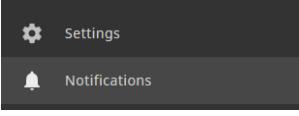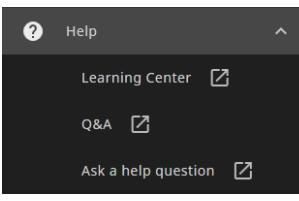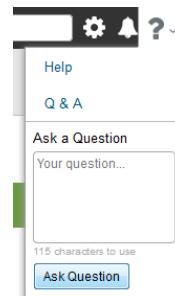
If the updated UI is enabled as a user preference, it is enabled only for that user. If the updated UI is enabled as a company setting, it is enabled for all company users (regardless of individual user preference settings).

MAIN MENUS AND GLOBAL ICONS

There are main menus, tabs, and global icons went that have remained the same between the New Tracker and the Classic Tracker.

New Tracker	Classic Tracker	Workflows
		• See your Tracker name, system role, and location. • Personalize Tracker for your locale or how you work • Review or update your user and admin profiles (without having to go to the Users list) • Manage your Tracker password
		• Review and work your action items • Review matter events and dates • Review accruals and budget event calendars
		• Work with your matter list and matter profiles • Bulk update matters • Upload matters • Upload fee arrangements
		• Review and work with pending invoices • Download, run, and upload AP batches • Review and budgets and accruals • Administer departmental budgets and forecasts • Review timekeeper rates • Bulk update invoices

New Tracker	Classic Tracker	Workflows
		• Find, review, and manage documents that span all your matters
		• Run preconfigured reports • Build your own reports • Save and share reports
		• Find, add, and manage Tracker user, firm, and company details • Review or update your user profile, preferences, and password • Bulk update user records
		• Review or update company-level settings
		• Review job notifications
		• Open the Tracker Help/Learning Center • Open a help topic specific to the current page (not shown) • Browse the Q&A or ask a question to see if it's already been answered

the answer company™
THOMSON REUTERS®

ACTION ITEMS

Selecting **Home > Action Items** in side navigation (or in quick navigation links) opens your Action Items page.

POPULAR WORKFLOWS

Invoice review

Select **Financial > Invoice Review** in side navigation.
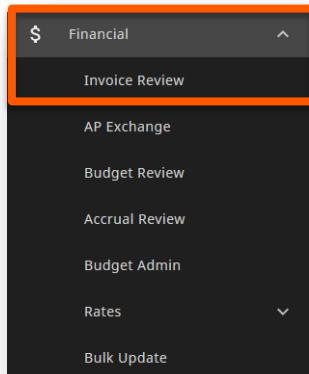
the answer company™
THOMSON REUTERS®

Matter create

Select **Matters > Matter List** in side navigation, and then click **Create matter** on the page toolbar.
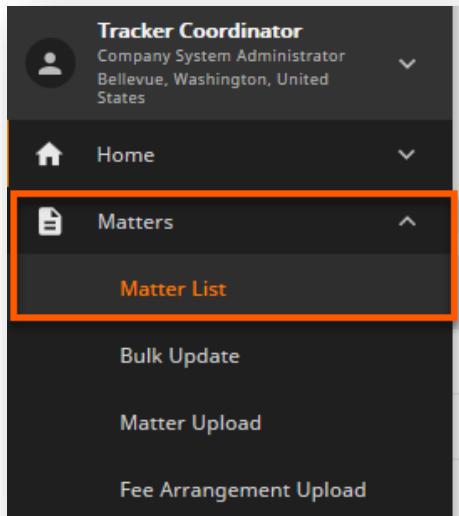
Budget review

Select **Financial > Budget Review** in side navigation.

When is it changing?

- For company users, the updated interface can be switched on as a user preference or company setting beginning with the Tracker 2018 R3 release, scheduled for 13 November 2018.

- On 15 February 2019, the updated interface will be switched on for all Tracker company and law firm users.

More resources

We recommend that you also watch the [new Tracker experience preview video](#) — a 4-minute, narrated walk-through of the new Tracker experience.

If you still have questions or want to further discuss the new Tracker experience, please reach out to your Client Success Manager or Tracker Support.

the answer company™
THOMSON REUTERS®