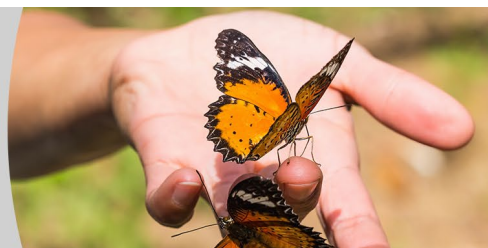


Legal Tracker

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).

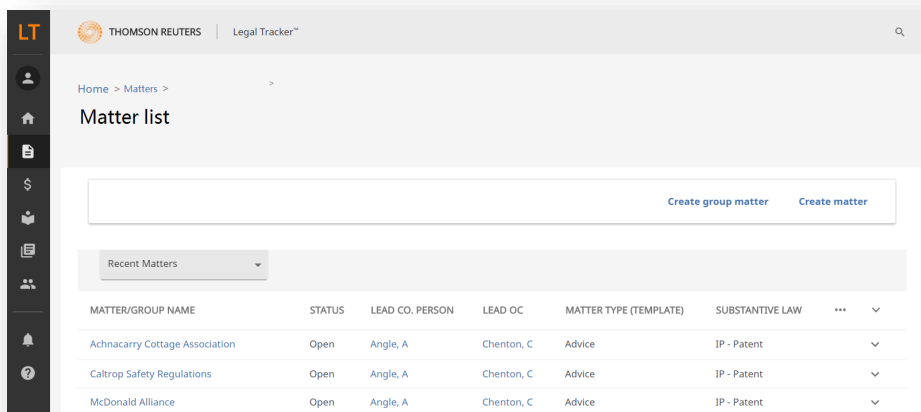
IN THIS GUIDE

What's changed?	2
What hasn't?	2
Changes at a glance	3
Modern visual design	3
Required field indicators	3
Main menus and icons in side navigation	4
Side navigation components	5
Actions menu options on page toolbars	6
Page toolbar "More" menu	7
Quick navigation links	7
Page usability improvements	8
Where to find things	11
Enhanced user interface switch	11
Main menus and global icons	12
Action items	14
Popular workflows	15
When is it changing?	18
More resources	18

What's changed?

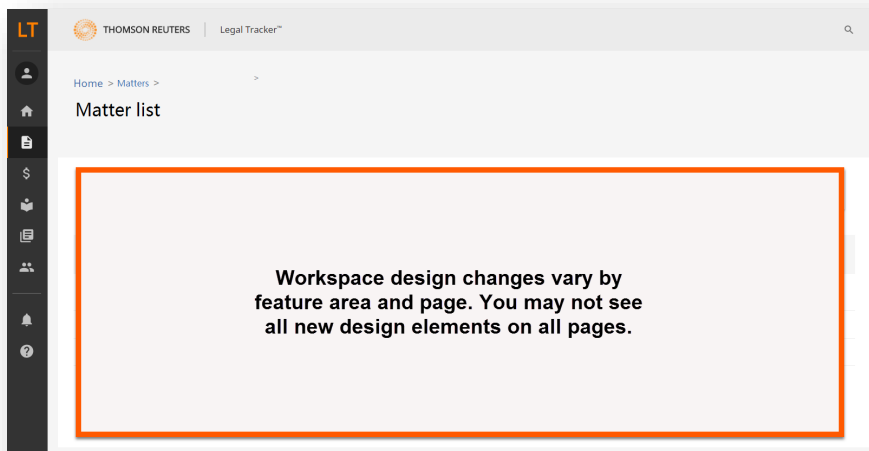
When you switch on the updated Tracker interface, you'll notice a few differences right away. You'll also quickly see that these changes are more about how Tracker looks and where things are, rather than how it works.

- 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?

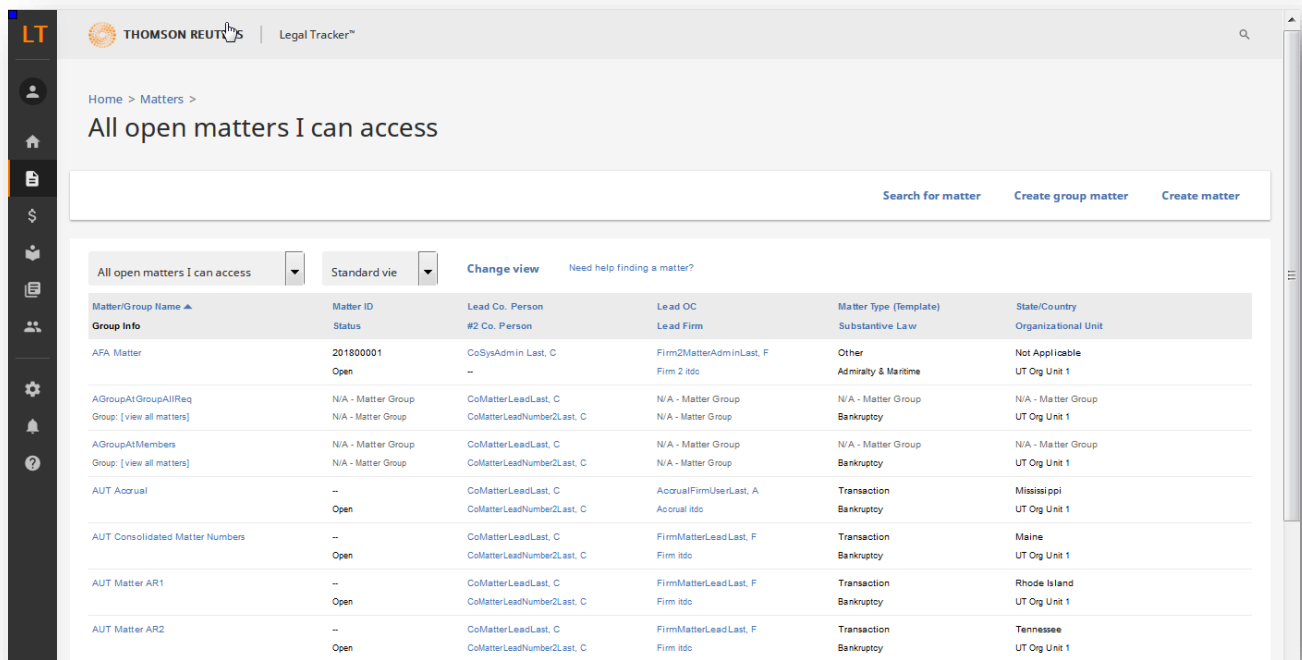
While you'll see new visual and navigation elements on all Tracker pages, changes in the workspace will vary by page and over time as the design is adopted for new features.



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.

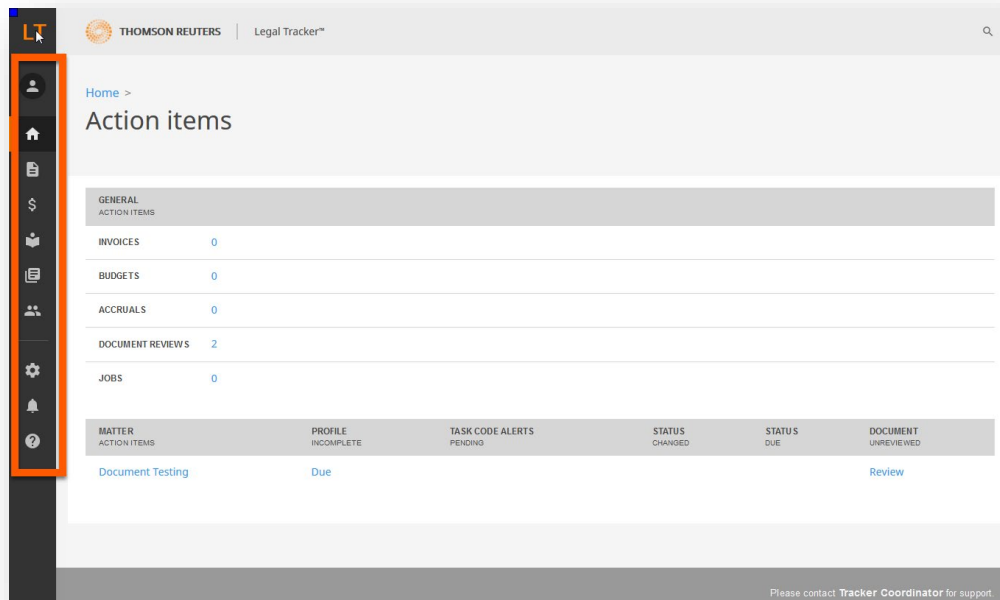
The screenshot shows a form for creating a new matter. The form includes a legend at the top: "LEGEND: * = Required to save form (hard required)" and "• = Required prior to approving first invoice (soft required)". The form fields are: "Full Matter Name/Parties Involved:" (with a red asterisk), "Short Matter Name:" (with a red asterisk), "Lead Company Person:" (with a red asterisk), "#2 Company Person:" (with a red asterisk), "Organizational Unit:" (with a red asterisk), and "Practice Group:" (with a red asterisk). The "Full Matter Name/Parties Involved:" field is highlighted with a red box. The "Short Matter Name:" field is highlighted with a red box. The "Lead Company Person:" field is highlighted with a red box. The "#2 Company Person:" field is highlighted with a red box. The "Organizational Unit:" field is highlighted with a red box. The "Practice Group:" field is highlighted with a red box.

by

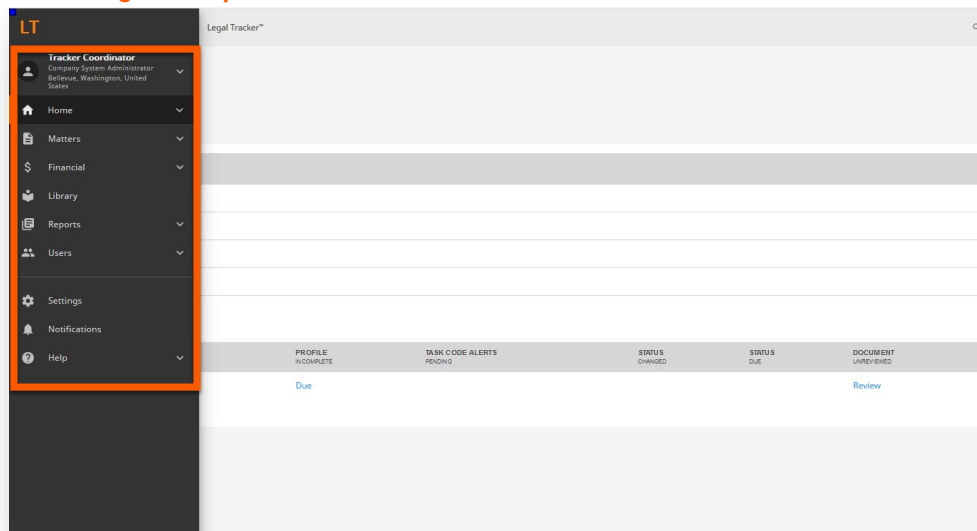
MAIN MENUS AND ICONS IN SIDE NAVIGATION

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

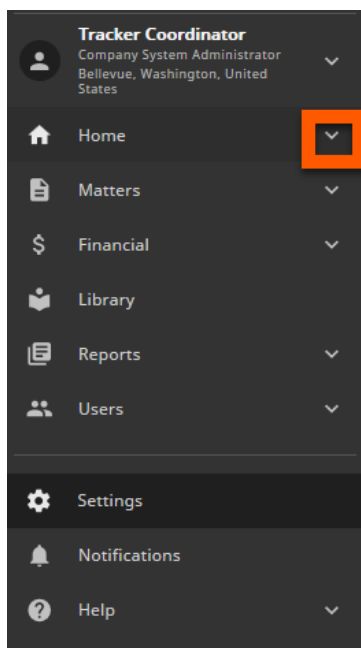
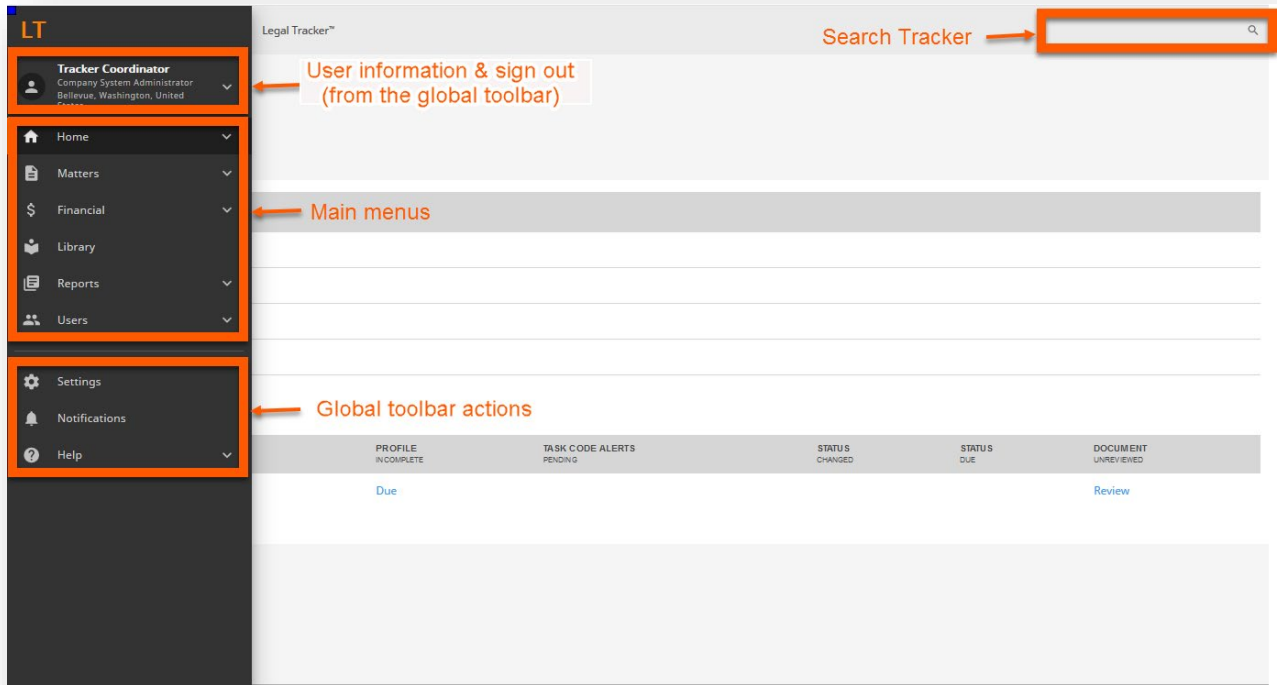


Side navigation expanded

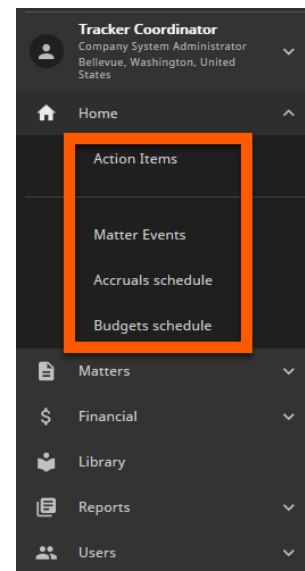


SIDE NAVIGATION COMPONENTS

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.

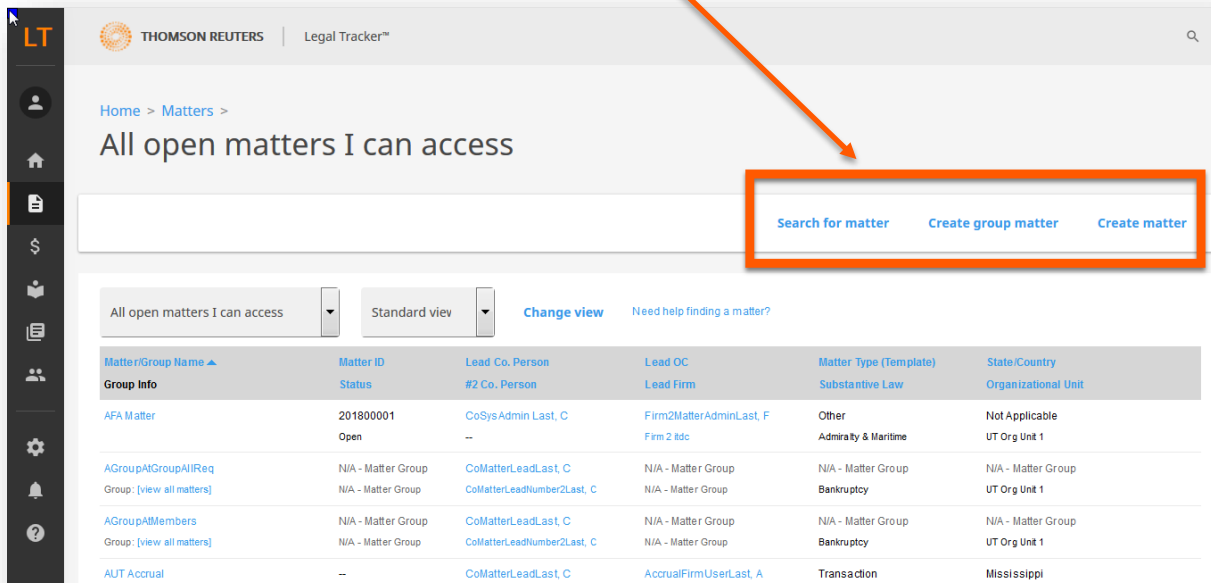
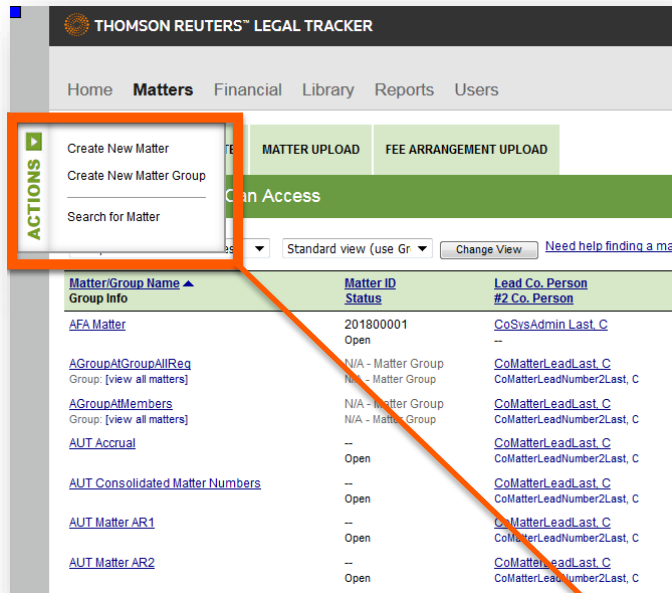


Clicking the arrows opens and closes the menus.



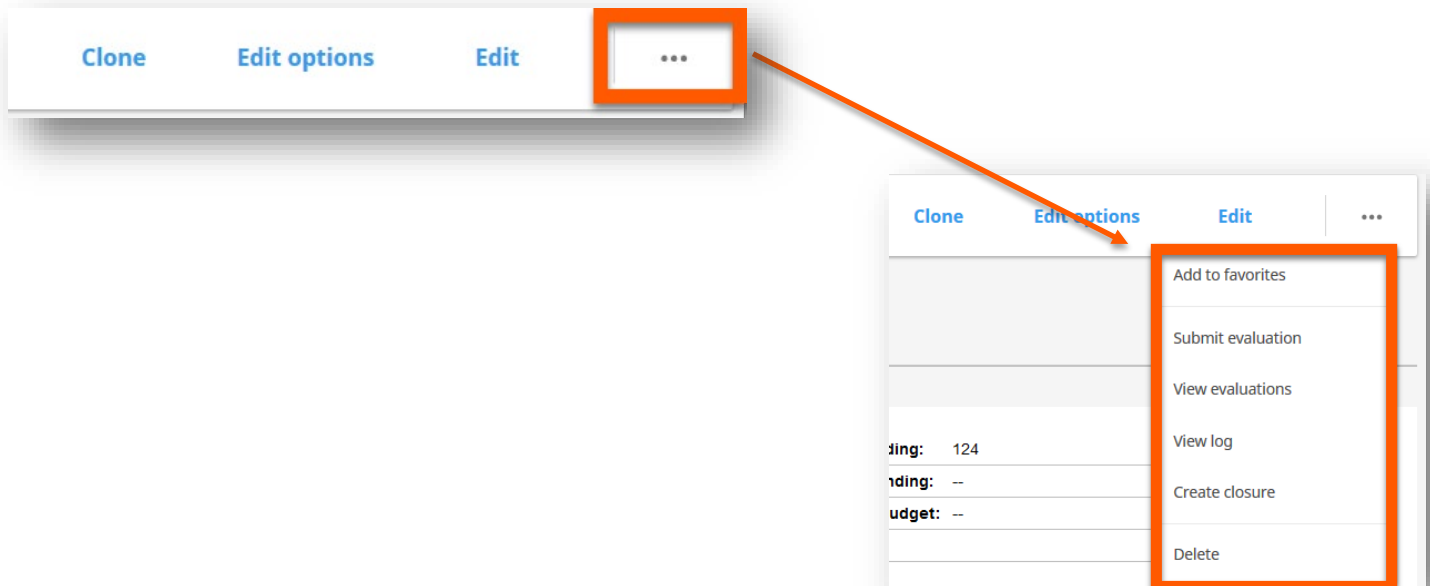
ACTIONS MENU OPTIONS ON PAGE TOOLBARS

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.



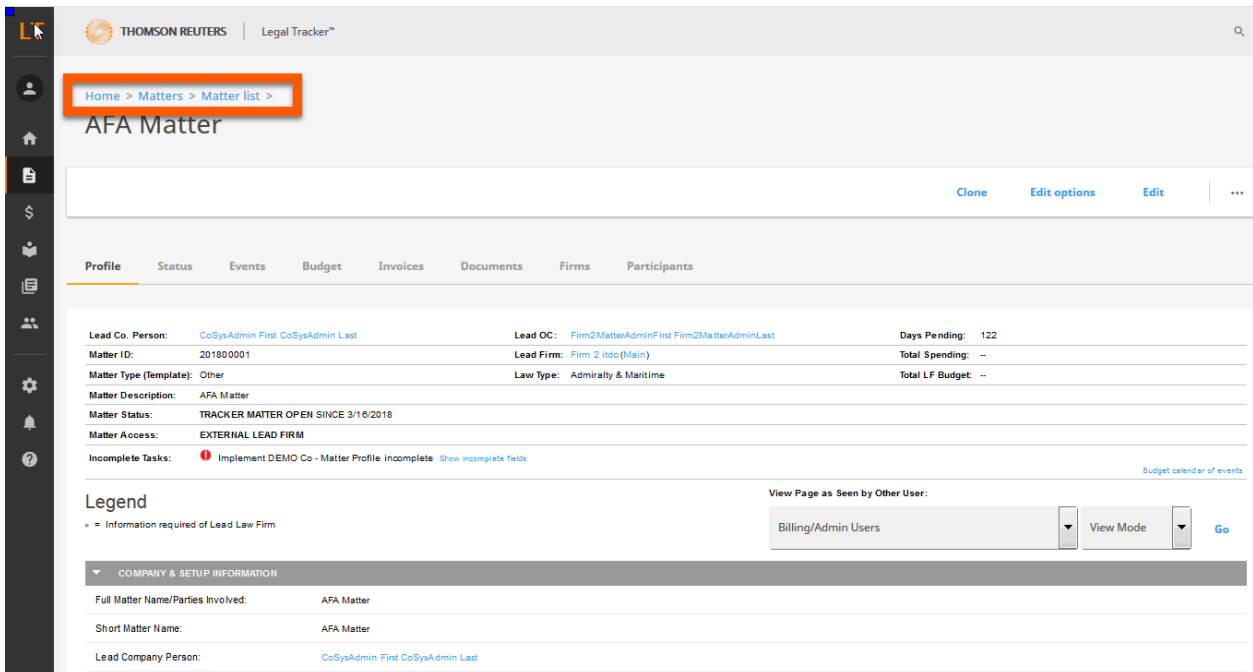
PAGE TOOLBAR “MORE” MENU

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.

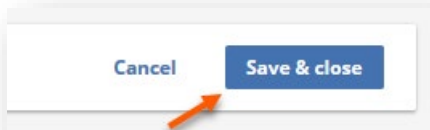


PAGE USABILITY IMPROVEMENTS

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

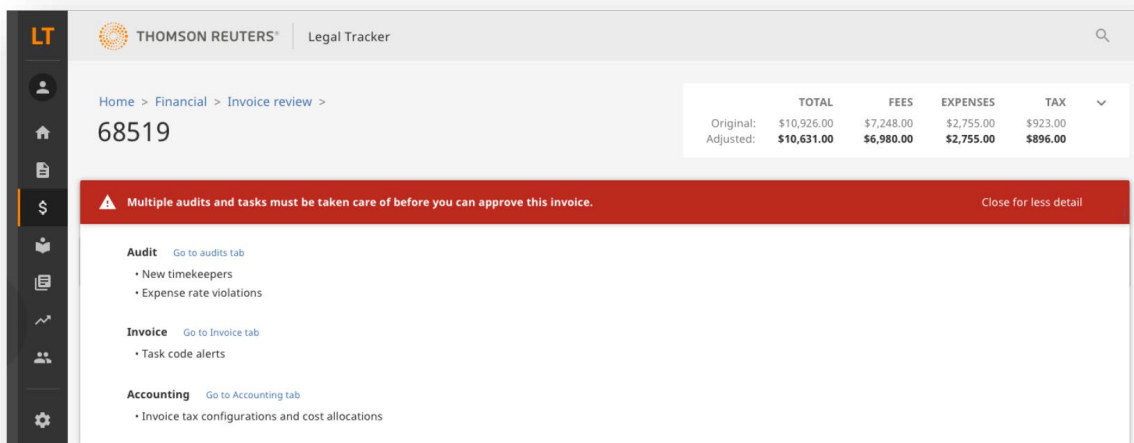
Raised buttons

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.



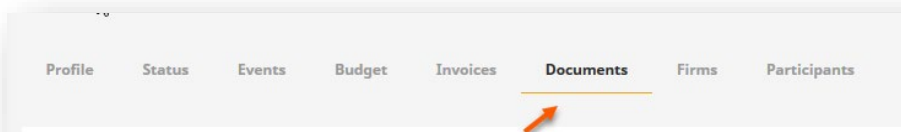
Notification bars

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.



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.

Dashboard > Financial >

Invoice review (14)

Total: \$48,400 Fees: \$21,005 Expenses: \$500 Tax: \$2,586
Adj: \$47,660 Adj: \$19,769 Adj: \$500 Adj: \$2,586

Filter list by keyword

Approve all available on this page

INVOICE	STATUS / DAYS	MATTER	TOTAL (Adj.)	FEES (Adj.)	EXPENSES	TAX (Adj.)	
EOFF201702	34 days	Thomas v. ACME	\$4,500	\$4,105	\$0	\$395	...
LK201765	12 days	Laskco v. Yung	\$3,200	\$2,750	\$0	\$450	Approve ...
EAFG00876	9 days	Gladwell v. Hawken	\$4,060	\$3,287	\$300	\$473	Approve ...
KU978654	3 days	AMEX v. Smith	\$5,200	\$4,750	\$0	\$450	...
TR97590	2 days	Bodnar v. Jatnieks	\$5,300	\$4,905	\$0	\$395	Approve ...
CGH087320	23 days	EUROX logo mark	\$1,900	\$1,711	\$0	\$189	Approve ...
IU993478	12 days	Lindig v. Smith	\$2,200	\$1,966	\$0	\$234	Approve ...

No Date Filters Selected No Audit Filters Selected

INVOICE	STATUS	AGE	MATTER	TOTAL (Adj.)	FEES (Adj.)	EXP (Adj.)	TAX (Adj.)	
2018 01		2 days	Achnacarry Cottage Association	\$1,000.00	\$1,000.00	\$0.00	\$0.00	Approve ...

MATTER GROUP: Achnacarry Cottage Association

MATTER TYPE: Advice

ORGANIZATIONAL UNIT: Paul Cameron Company

PRACTICE GROUP: Legal Department

SUBSTANTIVE LAW: IP - Patent

DATE POSTED: 07/25/2018

POSTED BY: Chase Chenton

APPROVAL ROUTE: AR012

AP ROUTE: AP Route

FIRM: Chenton & Chenton

OFFICE: Chelsea

COUNTRY: United States

DESCRIPTION: -

CURRENCY: United States Dollar

AP Codes [edit](#)

Percent	Cost Center	GL Account	Other AP Code	Comments
100%	1100-01404201			

Prior Action

...

Comments (internal)

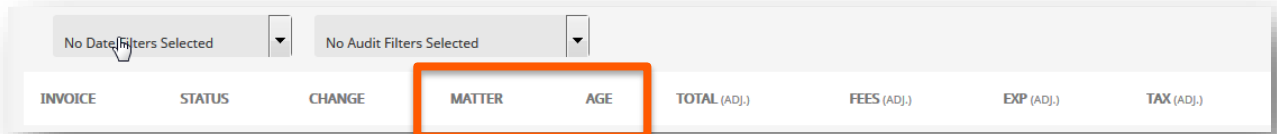
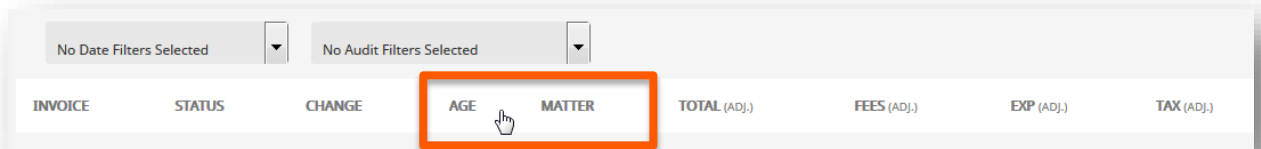
...

Comments (to firm)

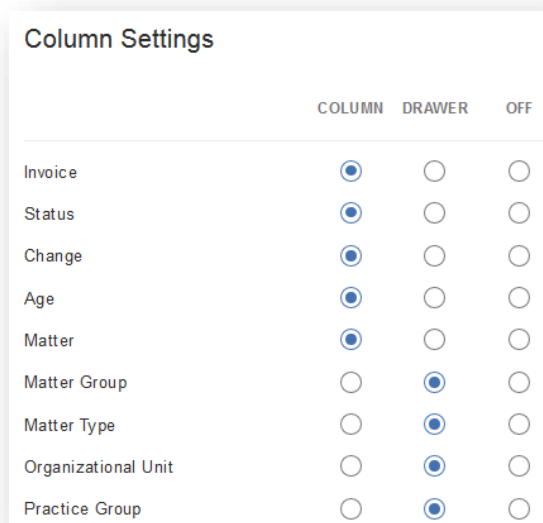
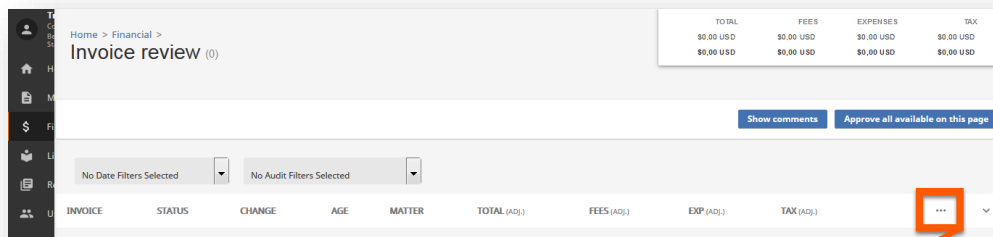
...

Drawer

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.



Where to find things

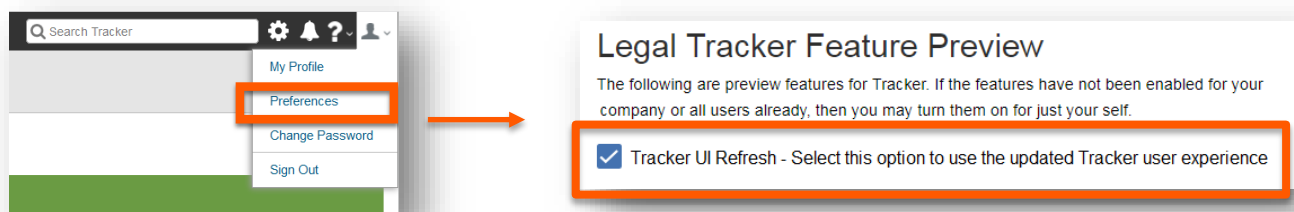
Now that you've seen what's changed, let's look at where to find things.

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.

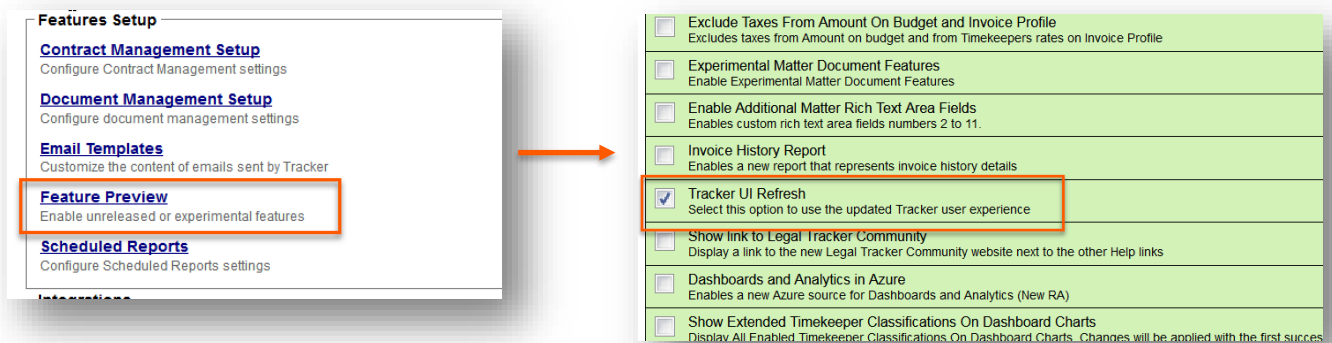
As a user preference

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
		<ul style="list-style-type: none"> • 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
		<ul style="list-style-type: none"> • Review and work your action items • Review matter events and dates • Review accruals and budget event calendars
		<ul style="list-style-type: none"> • Work with your matter list and matter profiles • Bulk update matters • Upload matters • Upload fee arrangements
		<ul style="list-style-type: none"> • 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
 Library		<ul style="list-style-type: none"> Find, review, and manage documents that span all your matters
 Reports Reports List Report Builder		<ul style="list-style-type: none"> Run preconfigured reports Build your own reports Save and share reports
 Users User List Firms Company Offices Bulk Update		<ul style="list-style-type: none"> Find, add, and manage Tracker user, firm, and company details Review or update your user profile, preferences, and password Bulk update user records
 Settings  Notifications		<ul style="list-style-type: none"> Review or update company-level settings
 Settings  Notifications		<ul style="list-style-type: none"> Review job notifications
 Help Learning Center Q&A Ask a help question		<ul style="list-style-type: none"> 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

ACTION ITEMS

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

The screenshot shows the 'Action items' page. On the left is a dark sidebar with navigation icons. The main content area has a breadcrumb 'Home >' and the title 'Action items'. Below this is a table with two sections: 'GENERAL ACTION ITEMS' and 'MATTER ACTION ITEMS'.

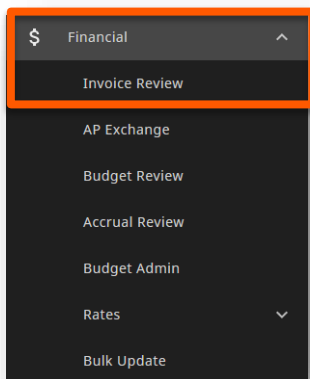
GENERAL ACTION ITEMS	
INVOICES	0
BUDGETS	0
ACCRUALS	0
DOCUMENT REVIEWS	2
JOBS	0

MATTER ACTION ITEMS	PROFILE INCOMPLETE	TASK CODE ALERTS PENDING	STATUS CHANGED	STATUS DUE	DOCUMENT UNREVIEWED
Document Testing	Due				Review

POPULAR WORKFLOWS

Invoice review

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

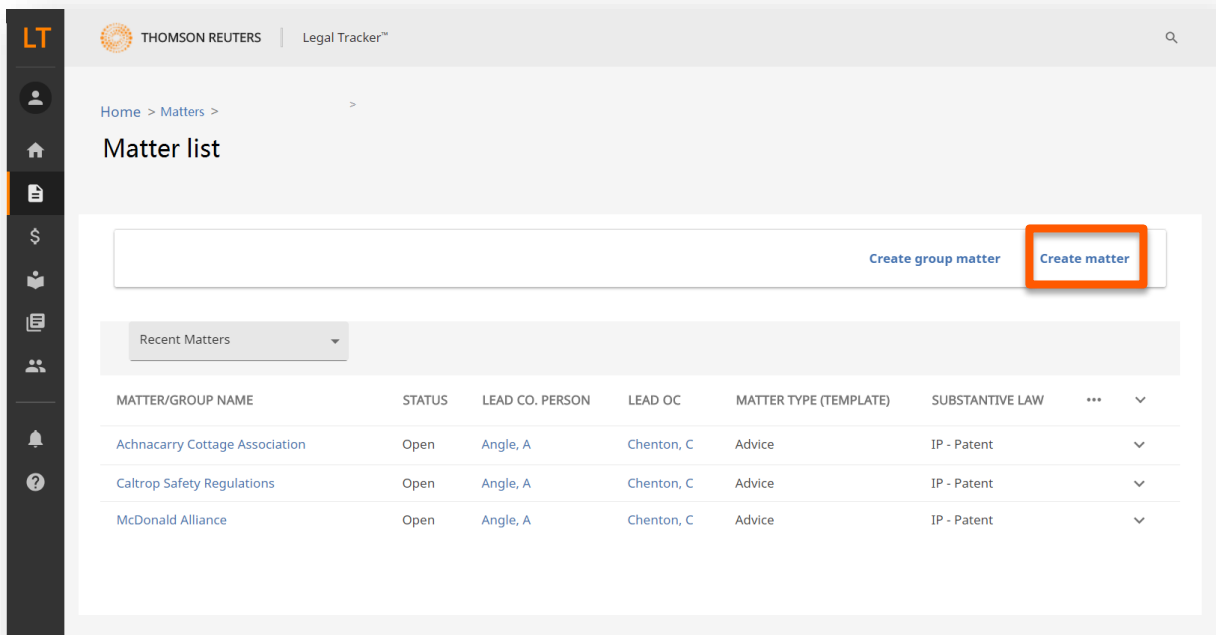
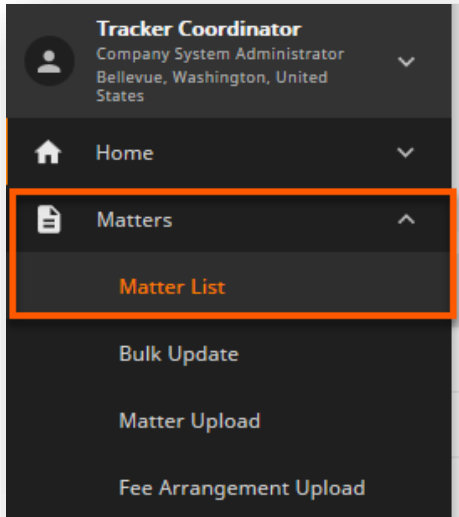


The screenshot displays the 'Invoice review' page in the Legal Tracker application. The page header shows 'Home > Financial > Invoice review (9)'. A summary table at the top right provides a breakdown of totals, fees, expenses, and taxes. Below this, there are filters for 'No Date Filters Selected' and 'No Audit Filters Selected'. The main content area is a table listing individual invoices with their status, change, age, matter, and financial details. Each row includes an 'Approve' button and a dropdown menu for further actions.

INVOICE	STATUS	CHANGE	AGE	MATTER	TOTAL (Adj.)	FEES (Adj.)	EXP (Adj.)	TAX (Adj.)	...	▼
2018 01	●		2 days	Achnacarry Cottage Association	\$1,000.00	\$1,000.00	\$0.00	\$0.00	Approve	...
2018 01 A	●		2 days	Caltrop Safety Regulations	\$1,000.00	\$1,000.00	\$0.00	\$0.00	Approve	...
2018 - 01 - MAA	●		2 days	McDonald Alliance	\$456.00	\$456.00	\$0.00	\$0.00	Approve	...
2018 - 02 - MAA	●		2 days	McDonald Alliance	\$789.00	\$789.00	\$0.00	\$0.00	Approve	...
2018 - 03 - MAA	●		2 days	McDonald Alliance	\$1,475.00	\$1,475.00	\$0.00	\$0.00	Approve	...
2018 - 02 - ACAA	●		2 days	Achnacarry Cottage Association	\$2,345.00	\$2,345.00	\$0.00	\$0.00	Approve	...
2018 - 02 - CPA	●		2 days	Caltrop Safety Regulations	\$3,111.00	\$2,855.00	\$256.00	\$0.00	Approve	...
2018 - 03 - CPA	●		2 days	Caltrop Safety Regulations	\$924.00	\$895.00	\$29.00	\$0.00	Approve	...
2018 - 03 - ACAA	●		2 days	Achnacarry Cottage Association	\$1,330.00	\$1,235.00	\$95.00	\$0.00	Approve	...

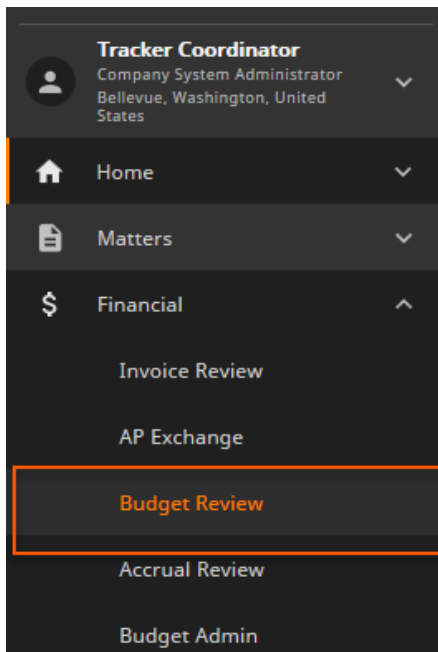
Matter create

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.



THOMSON REUTERS | Legal Tracker™

Home > Financial > Budget review >

Pending budgets

Print Export CSV

Due Date
08/01/2018 (5 days remaining) Budget calendar of events

My pending budgets (0) No budget type filters selected Budget revised date filter Change view

Select all on page Approve selected

Drag a column header and drop it here to group by that column

Action	Type	Matter	Vendor	Budget				Spending (excl. Tax)			Variance	
				Fiscal Year Total	YTD Total	YTD Fees	YTD Expe...	YTD Total	YTD Fees	YTD Expe...	YTD Total	YTD % Sp...
	Last Revised	Practice Group	Org. Unit	APA Total	Life Total	Life Fees	Life Expenses	Life Total	Life Fees	Life Expenses	Life Total	Life % Spent

100 items per page No items to display

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.