

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).

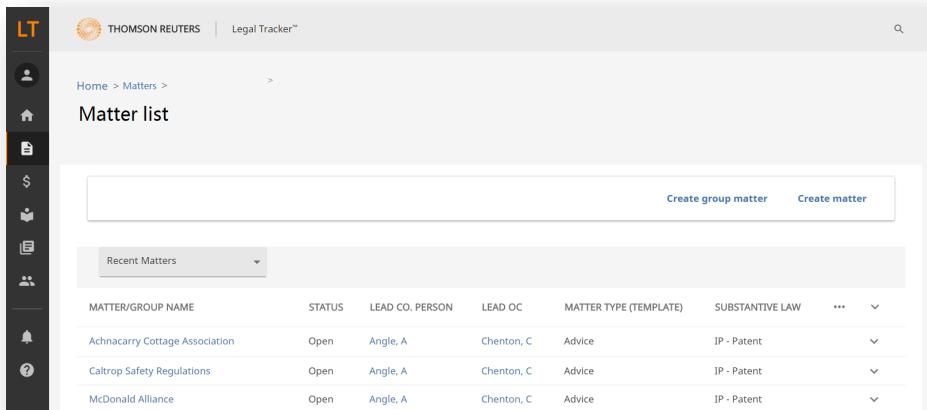
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What's changed?

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

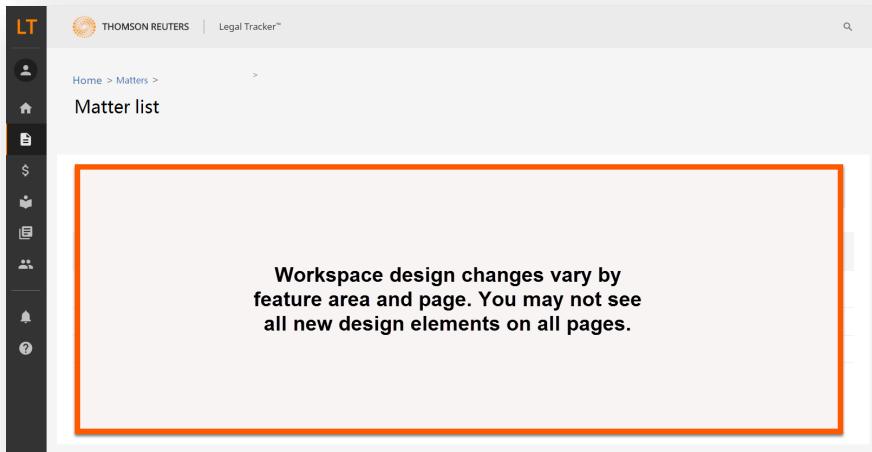


The screenshot shows the 'Matter list' page. On the left is a dark vertical navigation bar with icons for Home, Matters, People, Documents, and Help. The main area has a light background. At the top, there are buttons for 'Create group matter' and 'Create matter'. Below is a table with columns: MATTER/GROUP NAME, STATUS, LEAD CO. PERSON, LEAD OC, MATTER TYPE (TEMPLATE), and SUBSTANTIVE LAW. The table contains three rows of data.

MATTER/GROUP NAME	STATUS	LEAD CO. PERSON	LEAD OC	MATTER TYPE (TEMPLATE)	SUBSTANTIVE LAW
Achnacarry Cottage Association	Open	Angle, A	Chenton, C	Advice	IP - Patent
Caltrip Safety Regulations	Open	Angle, A	Chenton, C	Advice	IP - Patent
McDonald Alliance	Open	Angle, A	Chenton, C	Advice	IP - Patent

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 screenshot shows the same 'Matter list' page as above, but with a large orange rectangular box highlighting a message in the center of the main content area. The message reads: 'Workspace design changes vary by feature area and page. You may not see all new design elements on all pages.'

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.

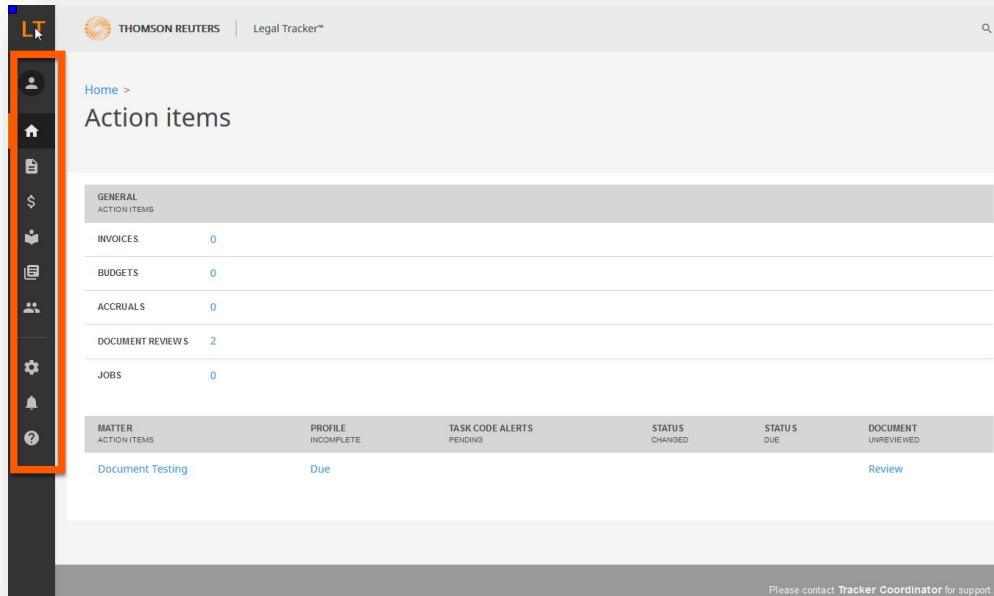
REQUIRED FIELD INDICATORS

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

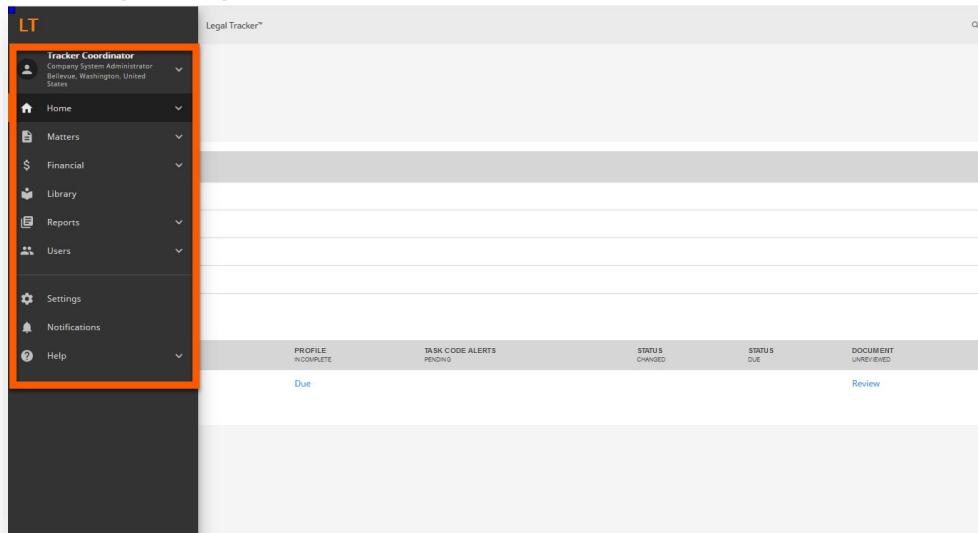
MAIN MENUS AND ICONS IN SIDE NAVIGATION

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

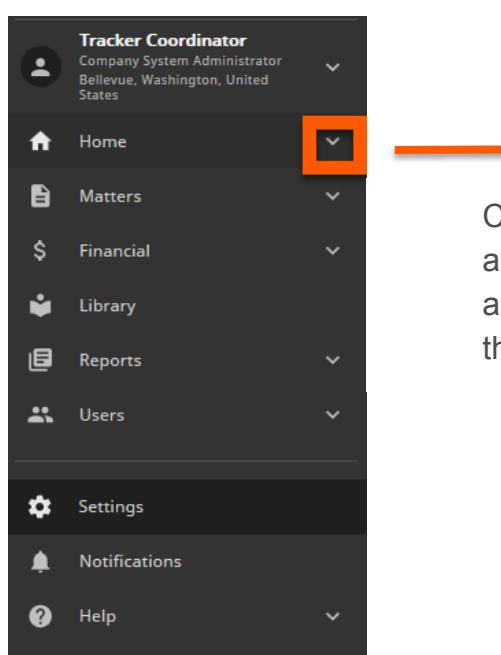
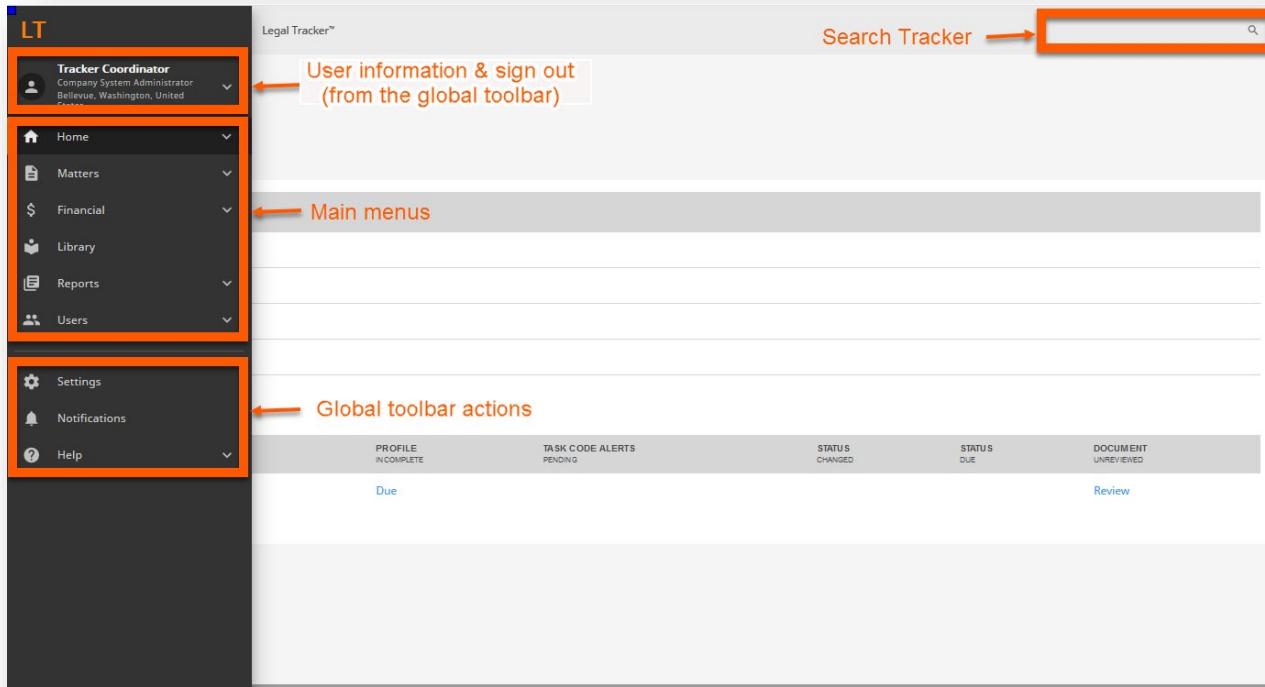


Side navigation expanded

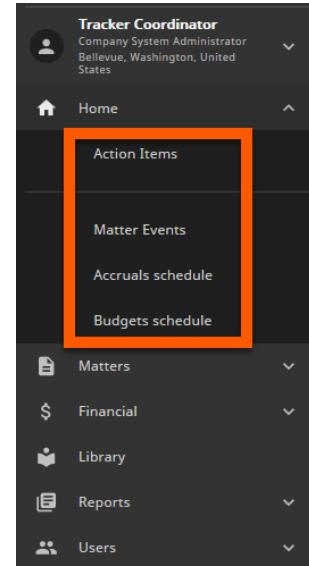


SIDE NAVIGATION COMPONENTS

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.

THOMSON REUTERS® LEGAL TRACKER

Home Matters Financial Library Reports Users

ACTIONS

- Create New Matter
- Create New Matter Group
- Search for Matter

MATTER UPLOAD FEE ARRANGEMENT UPLOAD

Can Access

Standard view (use Gr ▾) Change View Need help finding a matter

Matter/Group Name ▾	Matter ID	Lead Co. Person
Group Info	Status	#2 Co. Person
AFA Matter	201800001 Open	CoSysAdmin Last, C —
AGroupAtGroupAllReq Group: [view all matters]	N/A - Matter Group N/A - Matter Group	CoMatterLeadLast, C CoMatterLeadNumber2Last, C
AGroupAtMembers Group: [view all matters]	N/A - Matter Group N/A - Matter Group	CoMatterLeadLast, C CoMatterLeadNumber2Last, C
AUT Accrual	— Open	CoMatterLeadLast, C CoMatterLeadNumber2Last, C
AUT Consolidated Matter Numbers	-- Open	CoMatterLeadLast, C CoMatterLeadNumber2Last, C
AUT Matter AR1	-- Open	CoMatterLeadLast, C CoMatterLeadNumber2Last, C
AUT Matter AR2	-- Open	CoMatterLeadLast, C CoMatterLeadNumber2Last, C

LT THOMSON REUTERS® Legal Tracker™

Home > Matters >

All open matters I can access

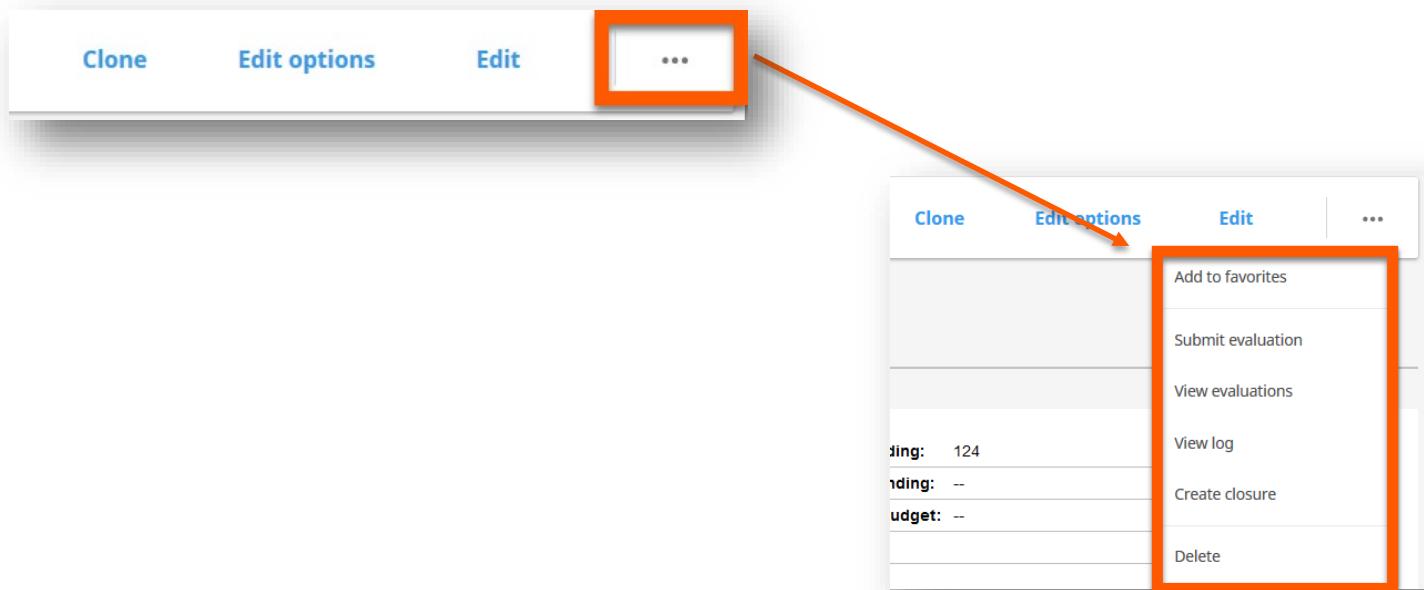
Search for matter Create group matter Create matter

All open matters I can access Standard view Change view Need help finding a matter

Matter/Group Name ▾	Matter ID	Lead Co. Person	Lead OC	Matter Type (Template)	State/Country
Group Info	Status	#2 Co. Person	Lead Firm	Substantive Law	Organizational Unit
AFA Matter	201800001 Open	CoSysAdmin Last, C —	Firm2MatterAdminLast, F Firm 2 Idc	Other Admiralty & Maritime	Not Applicable UT Org Unit 1
AGroupAtGroupAllReq Group: [view all matters]	N/A - Matter Group N/A - Matter Group	CoMatterLeadLast, C CoMatterLeadNumber2Last, C	N/A - Matter Group N/A - Matter Group	N/A - Matter Group Bankruptcy	N/A - Matter Group UT Org Unit 1
AGroupAtMembers Group: [view all matters]	N/A - Matter Group N/A - Matter Group	CoMatterLeadLast, C CoMatterLeadNumber2Last, C	N/A - Matter Group N/A - Matter Group	N/A - Matter Group Bankruptcy	N/A - Matter Group UT Org Unit 1
AUT Accrual	--	CoMatterLeadLast, C	AccrualFirmUserLast, A	Transaction	Mississippi

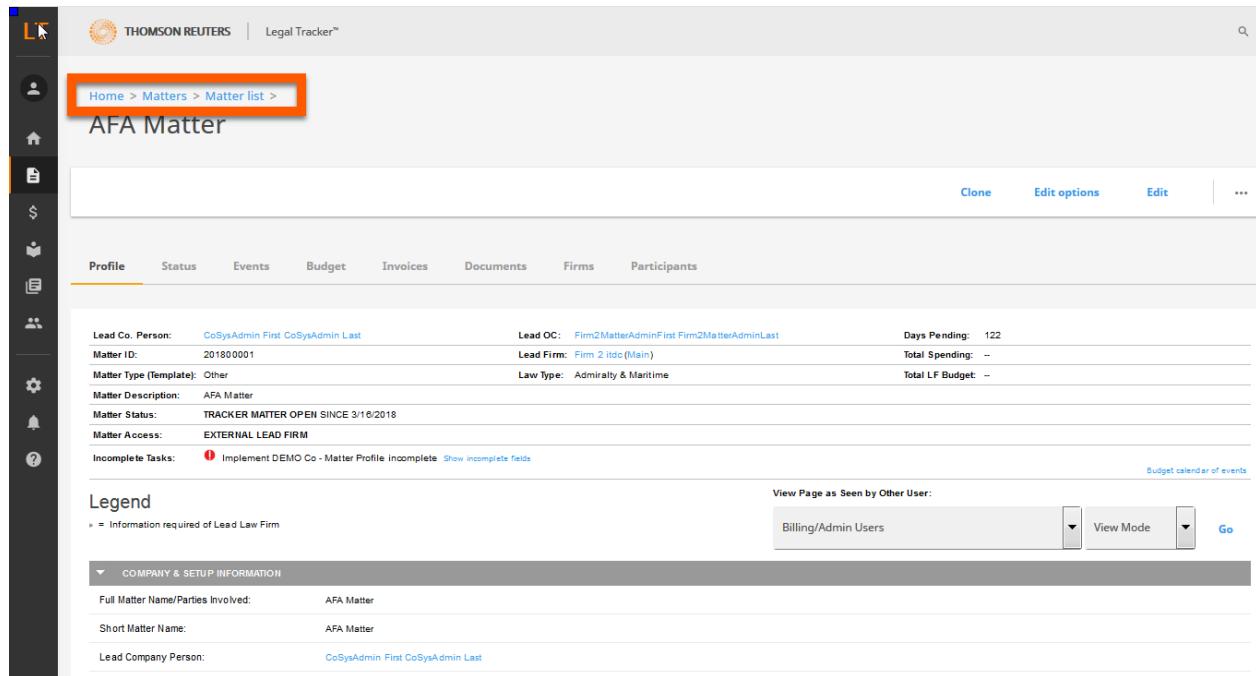
PAGE TOOLBAR “MORE” MENU

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.

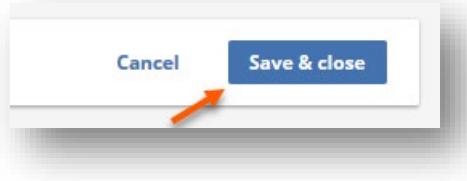


PAGE USABILITY IMPROVEMENTS

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

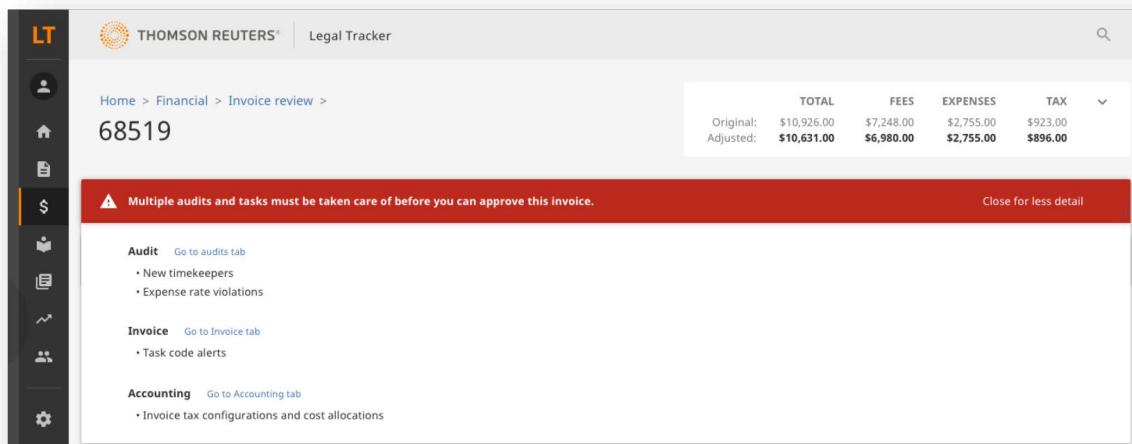
Raised buttons

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.



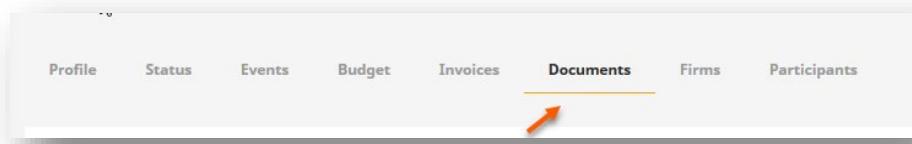
Notification bars

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

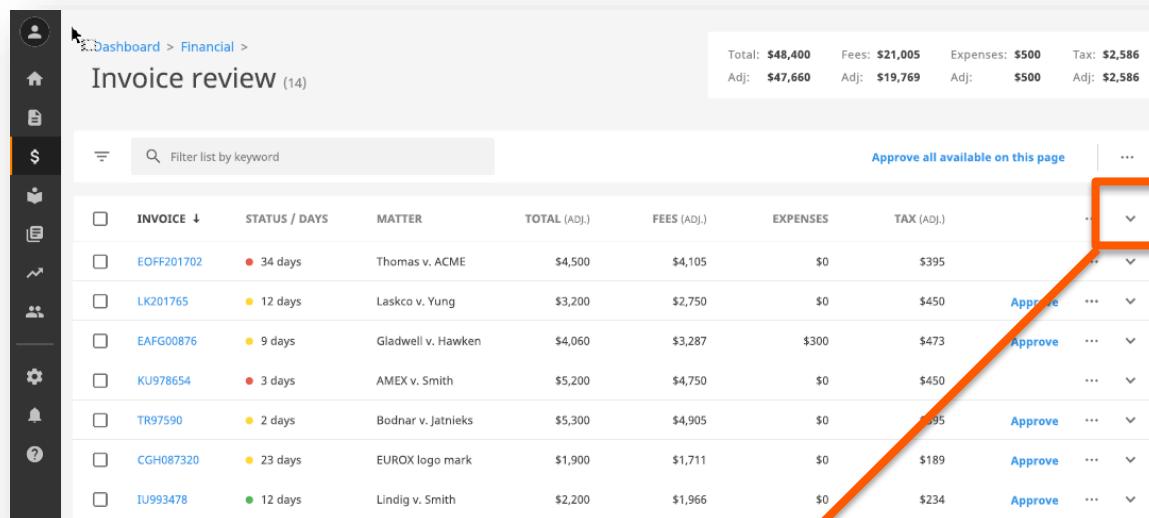
Accent bars provide a visual indicator of the active menu or tab in a group.



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.

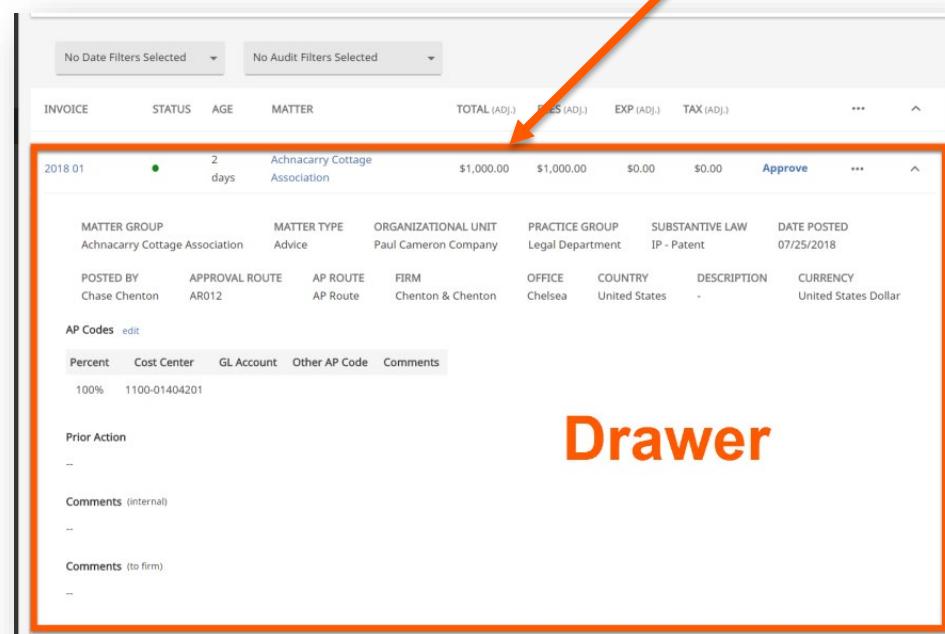


Dashboard > Financial > Invoice review (14)

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

<input type="checkbox"/>	INVOICE	STATUS / DAYS	MATTER	TOTAL (ADJ.)	FEES (ADJ.)	EXPENSES	TAX (ADJ.)	...
<input type="checkbox"/>	EOFF201702	● 34 days	Thomas v. ACME	\$4,500	\$4,105	\$0	\$395	...
<input type="checkbox"/>	LK201765	● 12 days	Laskco v. Yung	\$3,200	\$2,750	\$0	\$450	Approve ...
<input type="checkbox"/>	EAFG00876	● 9 days	Gladwell v. Hawken	\$4,060	\$3,287	\$300	\$473	Approve ...
<input type="checkbox"/>	KU978654	● 3 days	AMEX v. Smith	\$5,200	\$4,750	\$0	\$450
<input type="checkbox"/>	TR97590	● 2 days	Bodnar v. Jatnieks	\$5,300	\$4,905	\$0	\$495	Approve ...
<input type="checkbox"/>	CGH087320	● 23 days	EUROX logo mark	\$1,900	\$1,711	\$0	\$189	Approve ...
<input type="checkbox"/>	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.

No Date Filters Selected ▾ No Audit Filters Selected ▾

INVOICE STATUS CHANGE AGE **MATTER** TOTAL (ADJ.) FEES (ADJ.) EXP (ADJ.) TAX (ADJ.)

No Date Filters Selected ▾ No Audit Filters Selected ▾

INVOICE STATUS CHANGE **MATTER** AGE TOTAL (ADJ.) FEES (ADJ.) EXP (ADJ.) TAX (ADJ.)

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.

Home > Financial > Invoice review (0)

No Date Filters Selected ▾ No Audit Filters Selected ▾

INVOICE STATUS CHANGE AGE MATTER TOTAL (ADJ.) FEES (ADJ.) EXP (ADJ.) TAX (ADJ.) ...

Column Settings

	COLUMN	DRAWER	OFF
Invoice	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Status	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Age	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Matter	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Matter Group	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Matter Type	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Organizational Unit	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Practice Group	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Where to find things

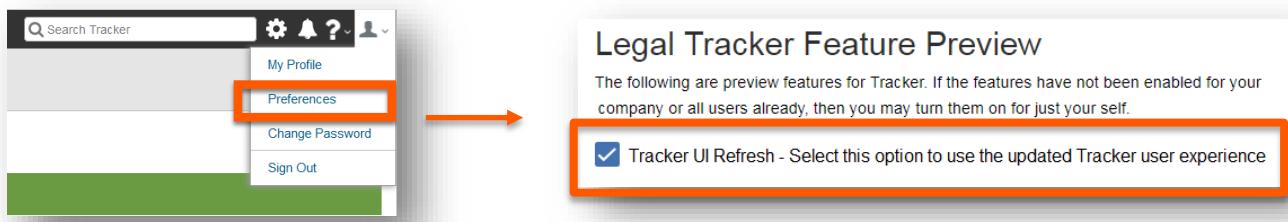
Now that you've seen what's changed, let's look at where to find things.

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.

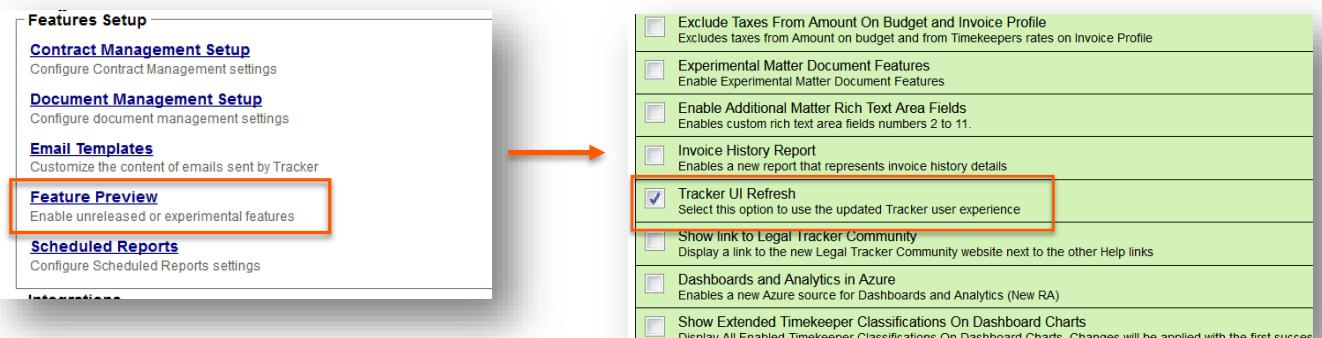
As a user preference

Enabled by company users in Preferences.



As a company setting

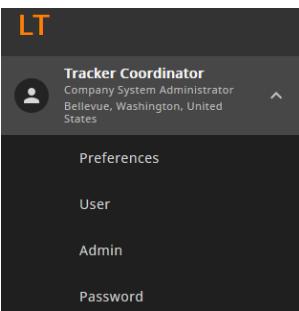
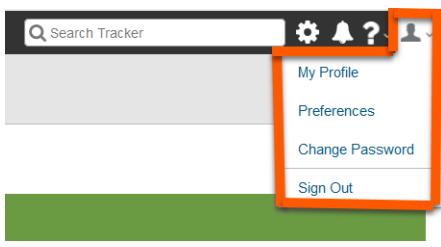
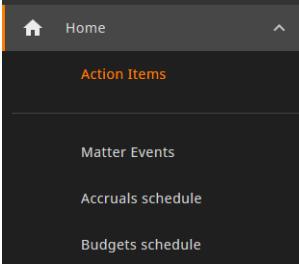
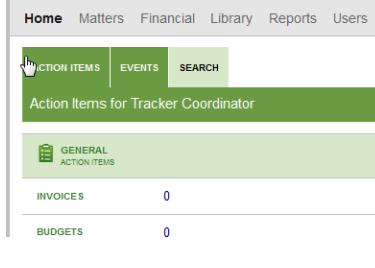
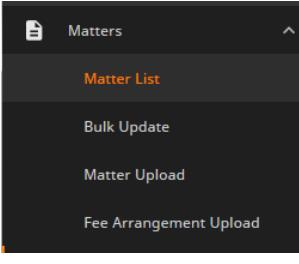
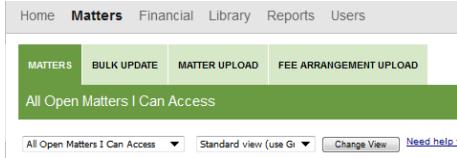
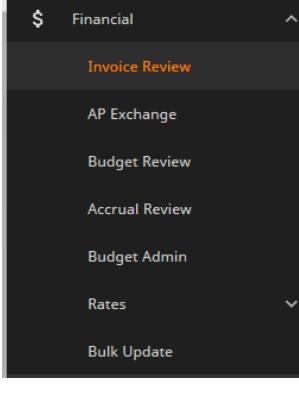
Enabled by a Tracker Coordinator or Company System Administrator in Tracker Setup > Features Setup.

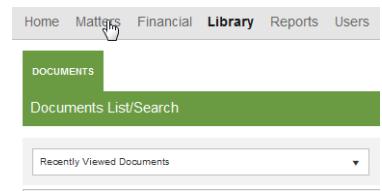
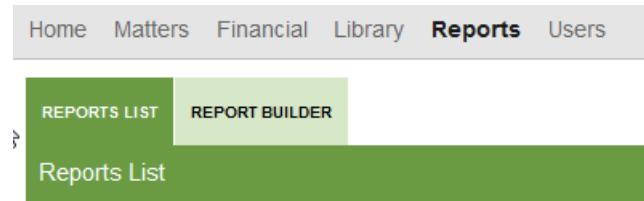
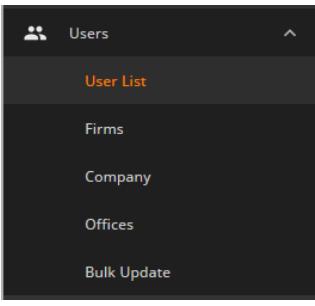
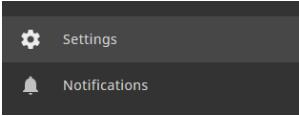
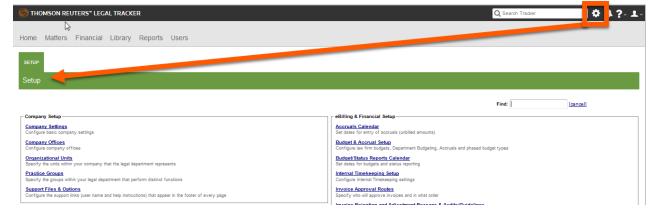
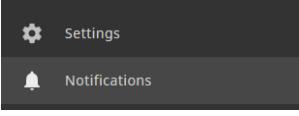
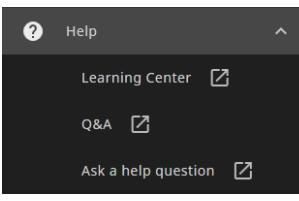
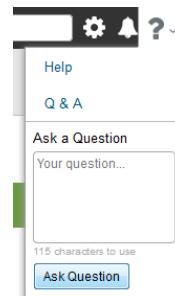


If the updated UI is enabled as a user preference, it is enabled only for that user. If the updated UI is enabled as a company setting, it is enabled for all company users (regardless of individual user preference settings).

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
 <p>LT</p> <p>Tracker Coordinator Company System Administrator Bellevue, Washington, United States</p> <p>Preferences User Admin Password</p>	 <p>Search Tracker LT</p> <p>My Profile Preferences Change Password Sign Out</p>	<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
 <p>Home Action Items Matter Events Accruals schedule Budgets schedule</p>	 <p>Home Matters Financial Library Reports Users</p> <p>Action Items for Tracker Coordinator</p> <p>GENERAL ACTION ITEMS</p> <p>INVOICES 0 BUDGETS 0</p>	<ul style="list-style-type: none"> Review and work your action items Review matter events and dates Review accruals and budget event calendars
 <p>Matters Matter List Bulk Update Matter Upload Fee Arrangement Upload</p>	 <p>Home Matters Financial Library Reports Users</p> <p>MATTERS BULK UPDATE MATTER UPLOAD FEE ARRANGEMENT UPLOAD</p> <p>All Open Matters I Can Access</p> <p>All Open Matters I Can Access Standard view (use Gr Change View Need help)</p>	<ul style="list-style-type: none"> Work with your matter list and matter profiles Bulk update matters Upload matters Upload fee arrangements
 <p>Financial Invoice Review AP Exchange Budget Review Accrual Review Budget Admin Rates Bulk Update</p>	 <p>Home Matters Financial Library Reports Users</p> <p>INVOICE REVIEW AP EXCHANGE BUDGET REVIEW ACCRUAL REVIEW BUDGET ADMIN RATES BULK UPDATE</p> <p>Pending Invoices</p> <p>Pending Invoices for: Tracker Coordinator Oldest Invoices (Date Posted) Total Fees Expenses Tax No Audit Filters Selected Adjusted Adjusted Adjusted Adjusted</p>	<ul style="list-style-type: none"> Review and work with pending invoices Download, run, and upload AP batches Review budgets and accruals Administer departmental budgets and forecasts Review timekeeper rates Bulk update invoices

New Tracker	Classic Tracker	Workflows
		<ul style="list-style-type: none"> Find, review, and manage documents that span all your matters
		<ul style="list-style-type: none"> Run preconfigured reports Build your own reports Save and share reports
		<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
		<ul style="list-style-type: none"> Review or update company-level settings
		<ul style="list-style-type: none"> Review job notifications
		<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 with the following sections:

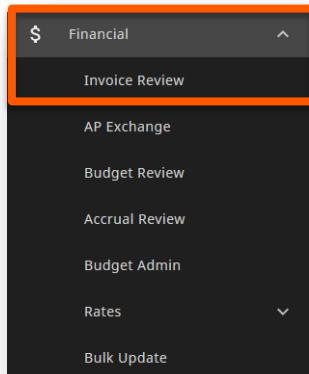
- GENERAL ACTION ITEMS:**

INVOICES	0
BUDGETS	0
ACCRUALS	0
DOCUMENT REVIEWS	2
JOBs	0
- MATTER ACTION ITEMS:** Document Testing
- PROFILE:** INCOMPLETE
- TASK CODE ALERTS:** PENDING
- STATUS:** CHANGED
- STATUS:** DUE
- DOCUMENT:** UNREVIEWED
- Review:** (link)

POPULAR WORKFLOWS

Invoice review

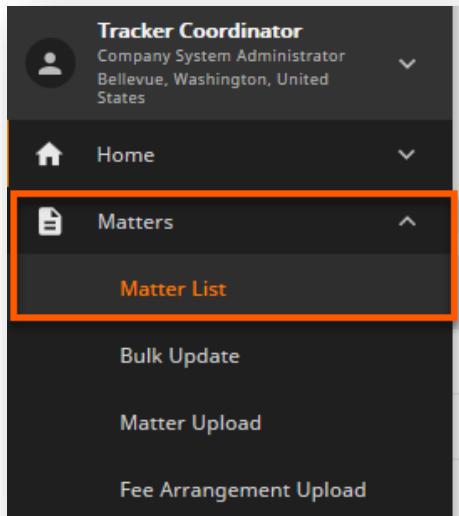
Select **Financial > Invoice Review** in side navigation.



					TOTAL	FEES	EXPENSES	TAX
					\$12,430.00 USD	\$12,050.00 USD	\$380.00 USD	\$0.00 USD
					\$12,430.00 USD	\$12,050.00 USD	\$380.00 USD	\$0.00 USD

Matter create

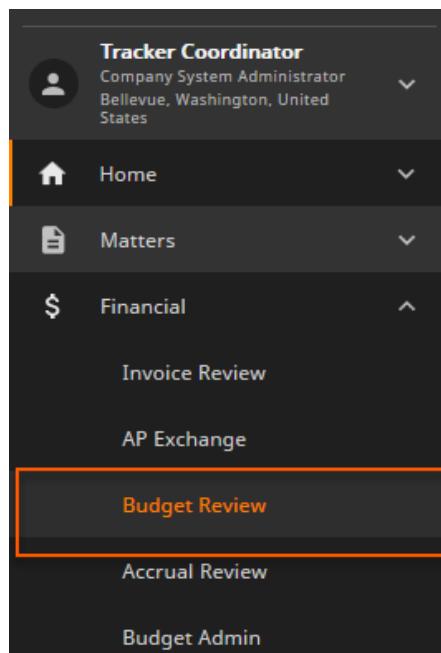
Select **Matters > Matter List** in side navigation, and then click **Create matter** on the page toolbar.



MATTER/GROUP NAME	STATUS	LEAD CO. PERSON	LEAD OC	MATTER TYPE (TEMPLATE)	SUBSTANTIVE LAW	...
Achnacarry Cottage Association	Open	Angle, A	Chenton, C	Advice	IP - Patent	▼
Caltrop Safety Regulations	Open	Angle, A	Chenton, C	Advice	IP - Patent	▼
McDonald Alliance	Open	Angle, A	Chenton, C	Advice	IP - Patent	▼

Budget review

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



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	Budget			Spending (excl. Tax)				Variance			
	Type	Matter	Vendor	Fiscal Year Total	YTD Total	YTD Fees	YTD Expe...	YTD Total	YTD Fees	YTD Expe...	YTD Total
Last Revised	Practice Group	Org. Unit	AFA 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.