THOMSON REUTERS LEGAL TRACKER

QUICK REFERENCE GUIDE

COMPANY ADMINISTRATORS

Document Version 2021-1

THOMSON REUTERS®

DOCUMENT VERSION HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY
2019-1	September 2019	New edition, revised for the current Legal Tracker interface.
2019-2	October 2019	Added additional content.
2021-1	July 2021	Revised information about training resources to include the Legal Tracker Learning Management System.

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WHAT IS LEGAL TRACKER?

Legal Tracker is the world's leading legal matter management, e-billing, and legal analytics system designed for corporate legal departments.

With Tracker's newly reimagined interface you can access your current matter information and submit invoices, status reports, budgets and documents electronically. More than 400 different reports help you analyze the legal work, spending, results and performance regarding your matters.

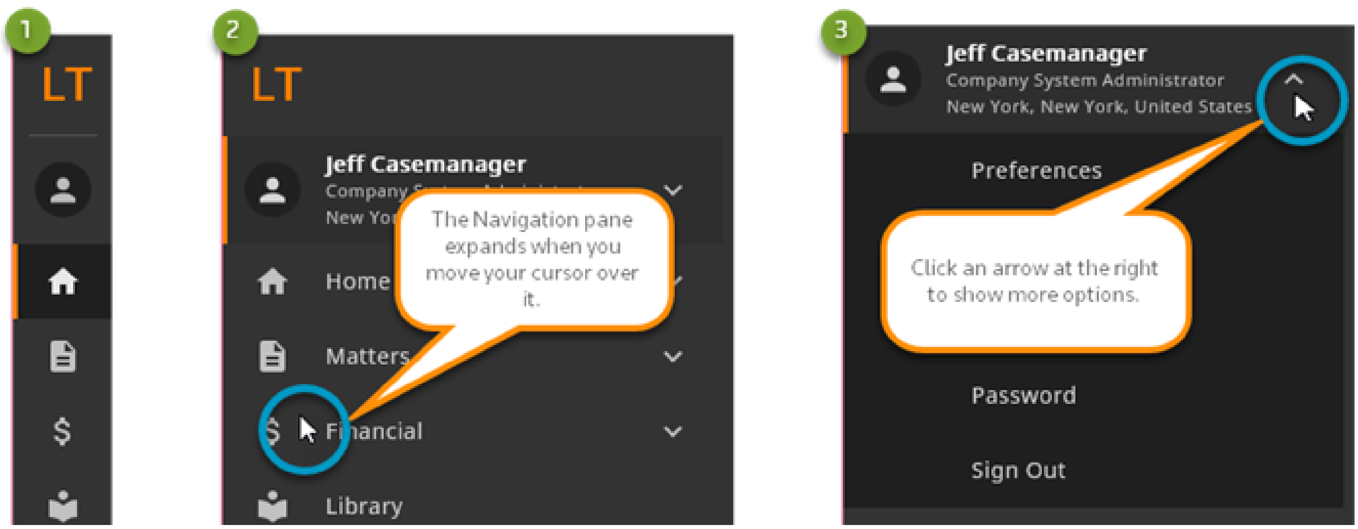
The Tracker platform is a native web-based application. All you need is an internet connection and a browser. We recommend you use one of the following browsers for best results:

- Google Chrome™
- Microsoft® Edge®
- Firefox®
- Safari®
- Microsoft® Internet Explorer®

To learn more about Tracker, visit legaltracker.com.

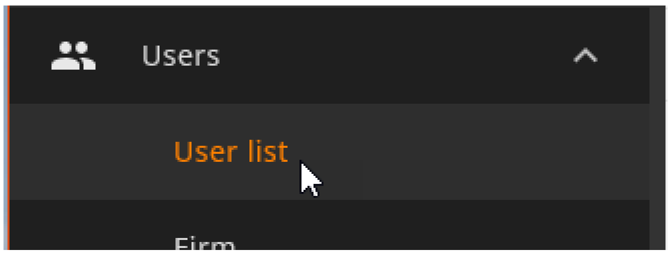
USING THE NAVIGATION PANE

At the left of every page in Tracker is a dark gray bar with icons. When you move your cursor over the bar, it expands to show a menu of the available functions in Tracker. Note that your Tracker screen may look a little different, depending on your Tracker role. If there is a down arrow to the right of a menu item, you can click it to show more menu options.



SETTING UP COMPANY OFFICES OR REGIONS

The Users Menu



You can find the **Users** menu in the left navigation.

SETTING UP COMPANY OFFICES OR REGIONS

Adding an Office or Region

1. Select **Settings** in the left navigation.
2. Under Company Setup, select Company Offices.
3. On the toolbar, click **Add company office**.
4. Fill out the office/region profile fields.
5. On the toolbar, click **Save & close**.

Editing an Existing Office or Region

1. Click **Users > Office List** in the left navigation.
2. Click the office or region that you want to edit.
3. On the toolbar, click **Edit company office/region**.
4. Edit the fields as appropriate.
5. On the toolbar, click **Save & close**.

ADDING A FIRM

Check if the Firm is Already Set Up

1. Select **Firms > Firm list** in the left navigation.
2. On the toolbar, click **Add firm**.
3. Next to **Search within**, check a checkbox to indicate whether you want to check your firm, the Tracker Worldwide Directory, or both.
4. Type the first name of the firm or vendor in the **Name** field.

> Tracker's search technology returns all results that sound like the name you enter, so spelling does not need to be exact. Entering the full firm name is likely to return more search hits.

5. Click **Search**. The results of your search appear in the **Firm Search Results** collapsible section.

IF YOU CHECKED THE OUR FIRMS CHECKBOX	This section shows the list of firms in your Tracker database that match your criteria. If the firm you searched for is shown here, the firm is already defined in your Tracker database.
IF YOU CHECKED THE TRACKER WORLDWIDE DIRECTORY CHECKBOX	This section shows possible matches in the directory for your search criteria. • If the firm is already defined in Tracker for your company, **Active** appears in the **Status** column next to the firm name. • If the firm you want to add is in the directory but not active for your company, click **add** next to the firm name. A new page opens that lets you complete the firm profile.
IF YOUR SEARCH DOES NOT RETURN ANY RESULTS	On the toolbar, select **Continue adding firm**, then continue to Complete the Firm Profile Information (page 5) below.

Complete the Firm Profile Information

1. Under **Step 2** next to **Status**, check the **Live Firm** button.
2. Fill out the firm profile.
3. Click **Continue**
4. When prompted, click **OK** to verify that you want to continue creating the firm.
5. In **Step 3**, create an office for the firm.
6. After you have filled out the required fields, on the top toolbar, click **Save & close**.

EDIT THE COMPANY PROFILE

1. Select **Settings** in the left navigation.
2. Under **Company Setup**, select **Company Settings**.

   Tip | You can also select **Users > Company profile** in the left navigation to open the Company Profile page.

3. On the toolbar, click **Edit company profile**.
4. Edit the fields as appropriate.
5. On the toolbar, click **Save & close**.

EDIT A FIRM'S PROFILE

1. Click **Firms > Firms list** in the left navigation.
2. Click the name of the firm that you want to edit.
3. On the top toolbar, click **Edit Firm Profile.**
4. Update the fields as needed.
5. On the toolbar, click **Save & close**.

WORKING WITH USERS

ADDING A COMPANY OR FIRM USER

1. Click **Users** > **User List** in the left navigation.
2. On the top toolbar, click **Add company user**.
3. On the page that opens, fill in the information for the new user. Required fields are marked with a red asterisk (*).
4. On the toolbar, click **Save & close**.

When a new user is added, the Tracker system sends an email to the user. This email contains a link to log in to Tracker and create a user profile.This direct sign-in link only works once. At first sign-in, the user is prompted to create a new password.

SETTING UP AND EDITING USER PROFILES

Company System Administrators can enter and edit the user profiles of company users on the Tracker system:

1. Click **Users** > **User list** from the left navigation.
2. Click **Edit** next to the name of the user whose user profile you would like to edit to display the user's profile. To find the user, you may need to change the user listing using the drop down menus at the top of the page and then click the **Change view** button.
3. Use the fields on the page that opens to update the user's information.
4. On the toolbar, click **Save & close**.

Important: You cannot edit the user profile of firm users Law firms may be working with multiple clients on Tracker. Consequently, law firm system administrators are solely responsible for editing the user profile of firm user.

EDITING A USER ADMINISTRATIVE PROFILE

The user's administrative profile includes settings such as the user's system role and access to matters, analytics, and reports.

Each user has a *user profile*, which is general contact information such as address and phone number. Every user also has an *administrative profile*, which only Company System Administrators can edit. A user's administrative profile includes selections such as the user's system role and special matter, analytics, and report access, which the user cannot edit unless the user is a company system administrator.

To view or edit a user's administrative profile:

1. Click **Users** > **User list** from the left navigation.
2. Click **Edit** next to the name of the user whose user profile you would like to edit to display the user's profile. To find the user, you may need to change the user listing using the drop down menus at the top of the page and then click the **Change view** button.
3. Use the fields to make the necessary changes to the user's administrative profile.
4. On the toolbar, click **Save & close**.

If you need to request a change to a law firm user's email, contact the law firm system administrator.

RESETTING A USER'S PASSWORD

For security reasons, when you reset a user’s password, the following will occur:

- Tracker randomly creates a new password and sends it to the user's primary email address specified in Tracker. You will not have access to the new or be able to specify the new password. The password is known only by the user, which is standard industry practice for secure systems.
- The user must create a new password at sign-in and cannot use any previously used passwords.

1. Click **Users** > **User list** from the left navigation.
2. Click **Edit** next to the name of the user whose user profile you would like to edit to display the user's profile. To find the user, you may need to change the user listing using the drop down menus at the top of the page and then click the **Change view** button.
3. From the toolbar, click the ellipsis (**...**) and select **Reset password**. Tracker sends a new password to the email address specified in the system.

Important For companies with OnePass authentication enabled, company and firm administrators cannot reset OnePass passwords for their respective users. Each user can reset their password by following the **Forgot my username or password link** on the OnePass sign-in page.

DELETING A USER

You cannot delete users; you can only deactivate them. Users are part of the auditing records in the database. If the user has been deactivated, the historical information is preserved. By deactivating the user, you prevent them from accessing your company's database, and block company users from being able to assign work to the user.

DEACTIVATING A USER

Company System Administrators can deactivate company and firm users. Firm Administrators can also deactivate firm users.

To deactivate a company or firm user:

1. Click **Users** > **User list** from the left navigation.
2. Click **Edit** in the **Admin Profile** column next to the user you want to deactivate. The User Administrative Profile appears.
3. Clear the checkmark in the **Active** box.
4. On the toolbar, click **Save & close**.

EXPORTING DATA

EXPORTING USER DATA TO A SPREADSHEET

1. Click **Users** > **User list** from the left navigation.
2. Use the view selectors to configure the list of users you want to include in the results, and then click **Change View**.
3. On the **Actions** menu, click **Export CSV**.
4. From the toolbar, click the ellipsis (**...**) and select **Export CSV**.
5. Follow your browser's instructions to save or open the search results file.

EXPORTING FIRM DATA TO A SPREADSHEET

You can generate and download list of firms that includes basic information such as address and key personnel.

1. Select **Firms > Firm list** in the left navigation.
2. Use the dropdowns to find the specific firms you want to include in the results. For example , you can limit your search results to include only active firms, or preferred firms.
3. Select **Change View**.
4. On the toolbar, click **Export CSV**.

Export Matter Data

Matter data, as well as timekeeper data, can be exported to a .CSV file. The spreadsheet includes the information for all columns each matter that is shown on the screen, as well as any information in the drawer for the matter.

1. Select **Firms > Firm list** in the left navigation.
2. Use the dropdowns to find the specific firm whose matters you want to work with.
3. Select **Change View**.
4. Select the name of the firm to open it.

5. Select the **Matters** tab.
6. Select a button at the top if you want to narrow the results by open matters, closed matters, or all matters. If you want to further narrow the selection by substantive law category, you can select one or more categories. When a category is in **bold**, it is selected and will be included in the list. You can select the category again to remove it.
7. If you want to change the columns that are shown on this screen and that will be included in the report, select the ellipsis (**...**) located in the column header to the far right of the screen and select **Edit column settings**. A new window opens that lets you choose the columns you want to be included.
8. On the toolbar, click **Export CSV**. If prompted, follow your browser's instructions. Otherwise, the downloaded file is stored in your **Downloads** folder.

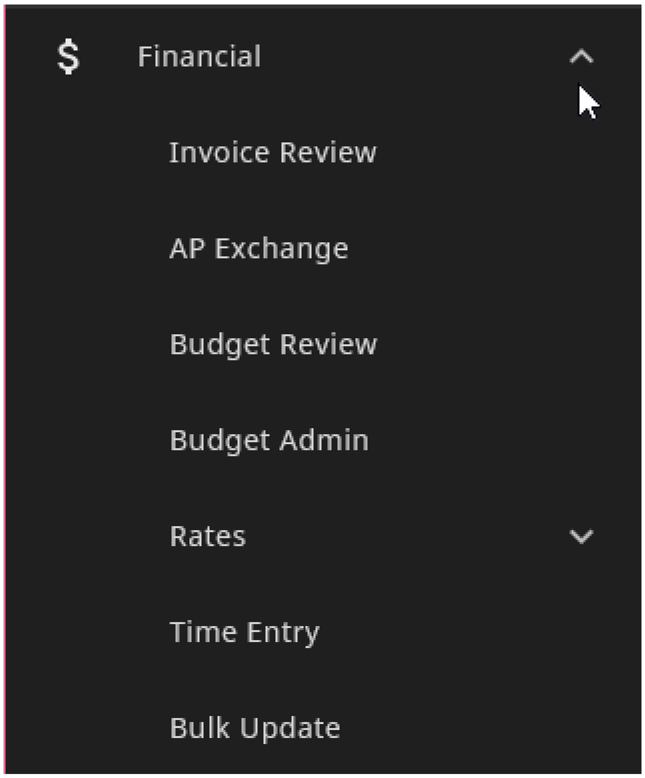
Export Timekeeper Data

The basic timekeeper data associated with a matter can be exported to a .CSV file. The spreadsheet includes the information for each timekeeper that is shown on the screen, as well as any information in the drawer for the matter.

1. Select **Firms > Firm list** in the left navigation.
2. Use the dropdowns to find the specific firm whose matters you want to work with.
3. Select **Change View**.
4. Select the name of the firm to open it.
5. Select the **Timekeepers** tab.
6. Select a button at the top if you want to narrow the results by all rates, specific rates, or matter-specific rates.
7. If you want to change the columns that are shown on this screen and that will be included in the report, select the ellipsis (**...**) located in the column header to the far right of the screen and select **Edit column settings**. A new window opens that lets you choose the columns you want to be included.
8. On the toolbar, click **Export CSV**. If prompted, follow your browser's instructions. Otherwise, the downloaded file is stored in your **Downloads** folder.

INVOICING

You can find the invoicing functions in Tracker in the **Financial** module in the left navigation.



After invoices are fully approved in Tracker and ready for payment, the approved invoice information must be sent to the AP department. All invoices are assigned to an AP Route, which determines how the invoice information is sent to AP. To make files available for delivery or download, the AP Batch must be run first. When the AP Batch is run, the approved invoice information will be processed and made available in three formats: the Invoice Spreadsheet, the Invoice Summaries, and the approved invoices themselves. Each of these formats is described in more detail below.

AP Batches can be run manually by Company System Administrators, or they may be scheduled to run automatically at a prescribed interval. Even if the AP Batch run is automated, Company System Administrators can still run batches manually at any time. The AP Batch may be run at different intervals for different AP Routes. Company users who are designated as AP Route Managers can sign in to Tracker and download the AP Batch files any time.

RUNNING THE AP BATCH

1. Click **Financial > AP Batch** in the left navigation.
2. In the **Manually Run AP Batch** collapsible section, select whether you want to run the batch for all AP routes or for a particular route. If for a particular route, select it from the drop-down list.
3. Click **Run**.

REVERSE AN APPROVED INVOICE

An invoice that has not been fully approved cannot be reversed. If an invoice is still pending and has been mistakenly approved by one reviewer, a higher-level reviewer or Accounting Code Reviewer can reject the invoice.

Important: You cannot undo an invoice reversal. Verify that you want to reverse the existing invoice before you proceed.

1. Select **Matters** > **Matter list** in the left navigation.
2. Open the relevant matter and click **Invoices**.
3. Click the invoice number of the invoice you want to reverse.
4. On the toolbar, click **REVERSE**.
5. Provide comments to the firm about why the invoice is being reversed. These comments will be visible to the firm.
6. On the toolbar, click **SAVE**.

BULK UPDATING MATTER DATA

To bulk-update matter data:

1. Click **Matters** > **Bulk Update** in the left navigation.
2. In section **Step 1: Select the matters to update**, use the filters to find the matters you want to edit. You can also use the Search by word or phrase dropdown to find specific matters.
3. In section **Step 2: Select a field to update**, use the dropdown to choose the field you want to bulk update. Depending on which field you choose in the dropdown, you may be prompted to further narrow the selection. For example, if you choose **Contracts - Person Responsible**, you are prompted to select the actual user that will be changed.
4. Under **Step 3: Generate list**, click **Generate list**.The Matter List Search Results list shows the matters that meet your filter criteria.
5. In the area immediately above the list of matters, use the dropdown to enter or select the new information to be added to the matters.
6. Check the checkbox next to the matters to be updated with this new information.

   We recommend that you print the page to ensure that you have a record of the original matter values. On the toolbar, click the ellipsis (**...**) and click **Print**.

7. On the toolbar, click **Save** to begin the update to your matters. Tracker displays job-related information and confirmation once the update completes.

Closing Matters with Bulk Update

You can use bulk update to quickly close multiple matters.

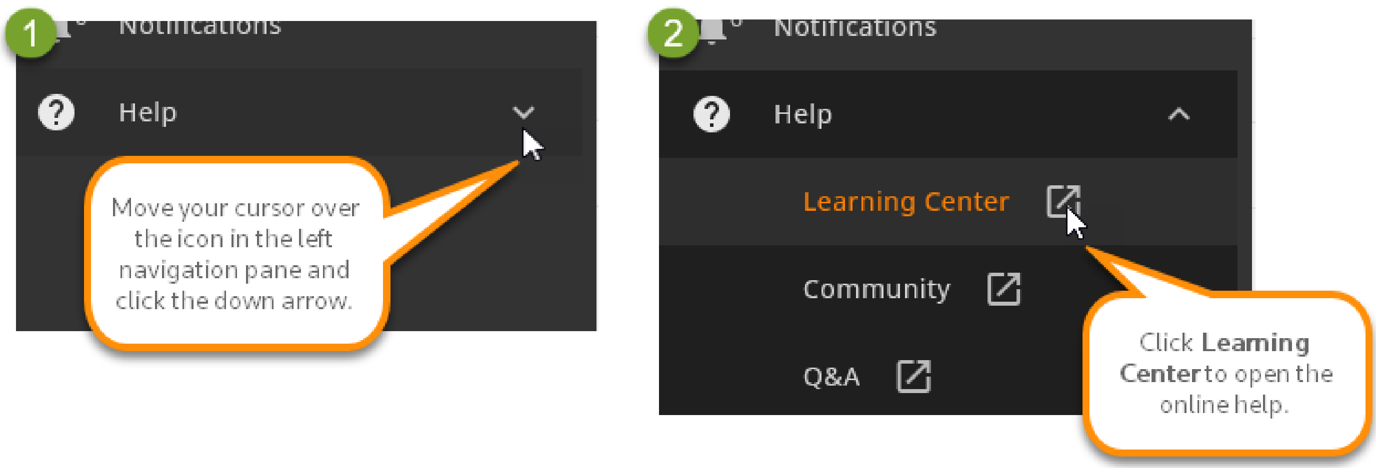
1. Select **Matters** > **Bulk Update** in the left navigation.
2. In the **Step 1** section, use the fields to filter for the matters you want to close.
3. Under **Step 2**, use the field list to select **Closing Matter Information**.
4. Next to **Matter Type (Template**) click **Select** and select the matter type template from the new page that opens.
5. Under **Step 3**, click **Generate List**. The list displays all the matters that meet your filter criteria.

6. In the field above the list of matters, use the fields to specify information to be updated.
7. Select the matters to be closed.
8. On the toolbar, click **Save & Update**.

ADDITIONAL RESOURCES

ONLINE HELP

Comprehensive user documentation is available on the Tracker Help Center. To open help, scroll to the bottom of the left navigation pane. On the **Help** menu, select **Learning Center**.

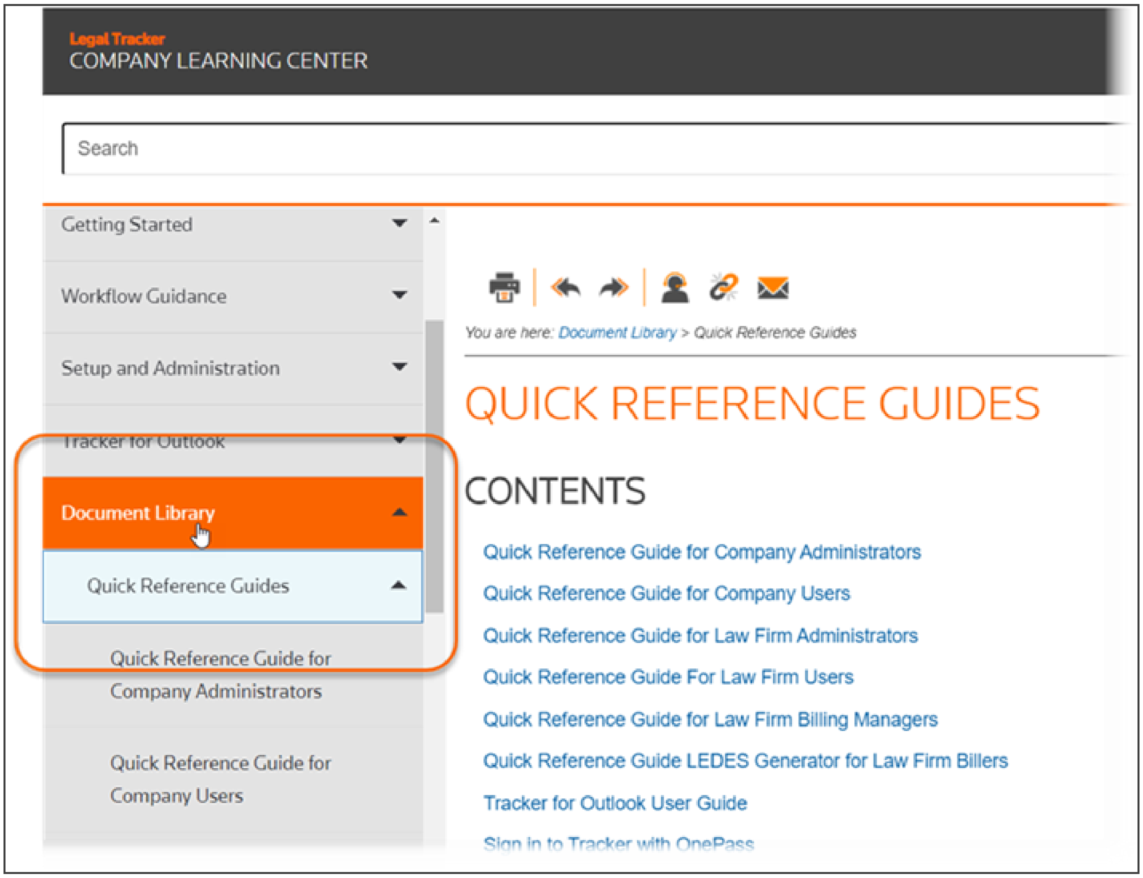


Online help has detailed step-by-step instructions on the tasks you perform in Tracker.

Additional page-specific help is available on selected pages in Tracker. When available, click **Page help** at the top of a Tracker page to access specific information for the page you are on.

DOCUMENT LIBRARY

The *Quick Reference Guide for Company Administrators* and other guides are available in the Learning Center Document Library.



LEGAL TRACKER TUTORIAL VIDEOS AND WEBSEMINARS

The Legal Tracker video tutorials and Webseminars provide instructions and demonstrations for how to perform common tasks in Legal Tracker. Please visit our new Learning Management System at https://corp-legal-training.thomsonreuters.com/ for the current Legal Tracker Webseminars and eLearning.

If you are new to Legal Tracker Learning, click the **Register** button to request an account and get started.

For any questions about training and inquire about the All Access Training Passport, please send an email to legaltraining.corporates@thomsonreuters.com.