

THOMSON REUTERS LEGAL TRACKER

QUICK REFERENCE GUIDE

FOR COMPANY USERS

Document Version 2022-2

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DOCUMENT VERSION HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY
2022-2	June 2022	Revised to include the redesigned invoice review process.
2022-1	January 2022	Revised information about training resources to include the Legal Tracker Learning Management System.
2020-1	January 2020	Updated for Tracker release 2019 Q4, to include information about posting invoices using the LEDES generator.
2019-1	September 2019	New edition, revised for the current Legal Tracker interface.

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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. Reports and dashboards 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®

To learn more about Tracker, visit legaltracker.com.

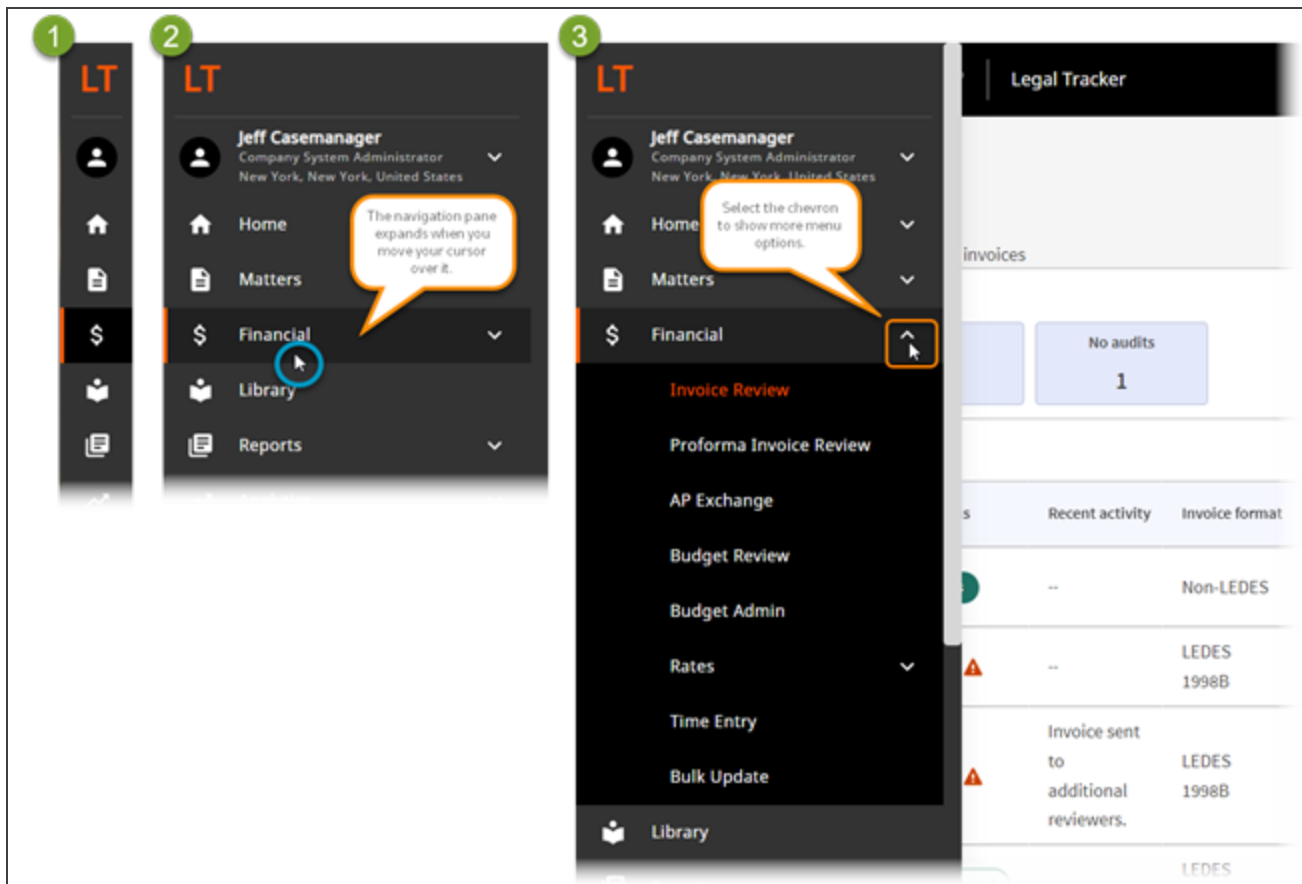
USING THE NAVIGATION PANE

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.



The options available in the menu depend on your system role, so your Legal Tracker screen may be slightly different from the illustrations.

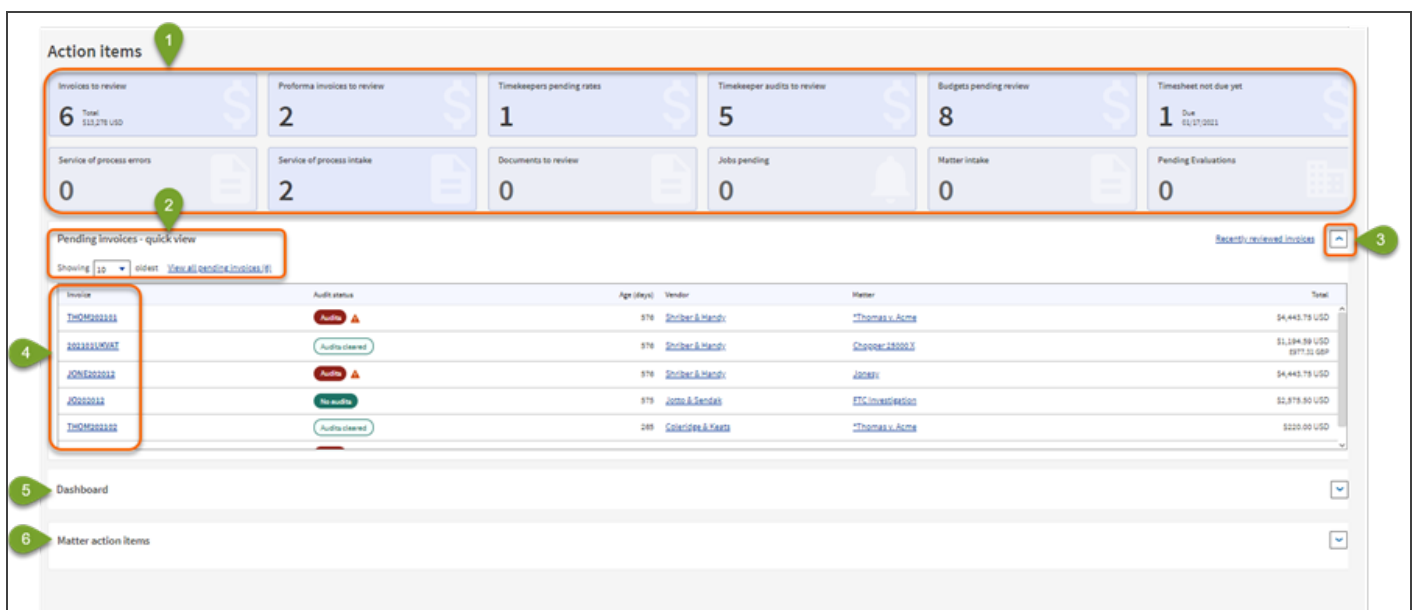
When there is a white chevron to the right of a menu item, you can select it to expand the menu and show more options.



ACTION ITEMS

Action items in Tracker let you know about things that may require your review or action and helps you quickly access tasks that require your attention. The Action items page is the default home page for most Tracker users. The options available to you are determined by your company's system settings, your system role and your preference settings. After you complete a required action, it is removed from the Action Items list.

THE ACTION ITEMS PAGE



1. The tiles under the Action Items section provide a quick overview of pending tasks.
2. The dropdown under the **Pending invoices - quick view** shows the ten most recent pending invoices by default, but can be changed to 20 or 30. This setting is retained and will be applied the next time you visit the page.
3. Select the chevron icon on the right next to the **Recently reviewed invoices** to expand and collapse the pane. This setting is retained and will be applied the next time you visit the page.
4. Invoice reviewers can open the invoice directly from the list in the **Invoice** column.
5. If you have access, you can use the chevron to the far right to expand and collapse the **Dashboards** pane.
6. The **Matter action items** pane shows details about matters tasks due for matters that need your immediate attention. Use the chevron to the far right to expand and collapse the pane.

The Dashboards pane

The **Dashboards** pane shows your dashboards. Select **Edit dashboard** to toggle between classic and next-generation dashboards.

Matter action items Pane

The screenshot shows the 'Matter action items' pane. At the top, there is a navigation bar with 'THOM202102', 'Audits cleared', '265 Coleridge & Keats', and '*Thomas v. Acme'. Below this is a 'Dashboard' section. The main section is 'Matter action items', which contains a table with the following data:

Matter	Profile incomplete	Pending task code alerts	Status changed	Status due	Documents to review
*Thomas v. Acme					Review
Acme Holdings v. CSII				SSO & v. lists	
ACME vs. Delta	Due				
Marcus Hanes- Oz visa application		Review			
Salt & Pepper	Due				
Springfield v. BMS PM	Due				

The **Matter action items** pane shows tasks due for matters that need your immediate attention. It does not list of all of your matters. Select a hyperlink to open the matter.

WORKING WITH MATTERS

The Matters page lists the matters you have access to either directly or as a delegate. If another user names you as a delegate, you automatically have their same matter access.



Only company users can create, close, or delete matters in Tracker.



To open the Matters page, select **Matters > Matter List** in the left navigation.

CREATING A MATTER

Company users with a matter role of Matter Creator or higher can create matters. The first step to creating a matter is to select a matter type template. The matter type template is a custom set of matter profile fields that apply to matters of a specific type. You must select the matter type template before you can proceed to the next page.

To create a matter:

1. In the left navigation, select **Matters > Create Matter**. If the Create Matter option does not appear on your navigation pane, your system role does not allow you to create matters.
2. Legal Tracker opens to the first of two pages in the matter creation process. Next to **Matter Type (Template)**, click **Select** and select the matter subtype from the list.
3. Complete the remaining fields on page 1 of the New Matter page. The fields on this screen depend on the type of matter you are creating. Fields marked with an asterisk are required.
4. On the toolbar, click **Next**.
5. Complete the remaining sections on page two of the New Matter page. Fields marked with a black asterisk are required before invoices for this matter can be posted or reviewed.
6. Other fields may be available on this page, depending on whether any integrations are configured for your company.
7. On the toolbar, select **Save & close**.

MATTER PROFILE TAB

The matter **Profile** tab shows details about a matter and is the starting point for matter actions such as viewing or submitting outside counsel evaluations; or cloning, closing, or deleting matters. Fields and sections that you see on this page are determined by the matter type template that was used to create the matter.



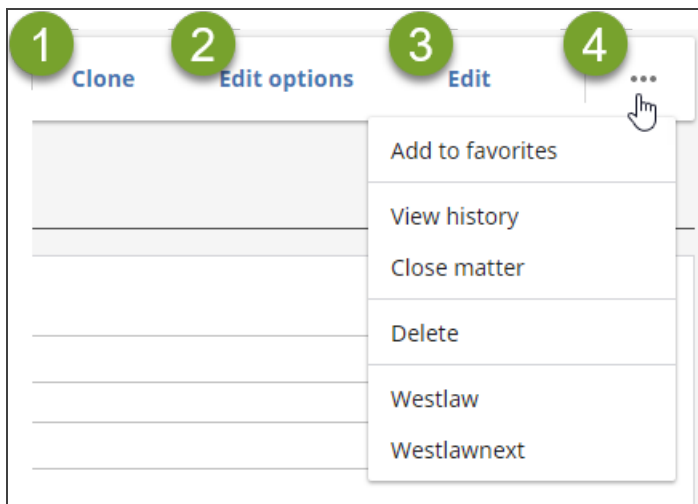
What you can see and do is determined by how your company has configured Legal Tracker, your system role, admin profile settings, personal preferences, feature-level settings, and more. Your experience may differ from the information explained here.

Opening a matter opens the matter's **Profile** tab:

1. Select **Matters > Matter list** in the left navigation.
2. Select the hyperlinked name in the **Matter/Group Name** column.

Using This Page


The toolbar provides access to functions such as closing and editing the matter.




1. **Clone** creates an exact copy of this matter.
2. **Edit options** lets you change parameters, such as the type template or firm access, or to assign this matter to a group.
3. **Edit** lets you update the matter information.
4. The **Ellipsis** icon opens other functions that lets you delete, close matter, or view history.

4. The three small dots  open a list of additional options:

ADD TO FAVORITES	Marks the matter as a favorite. Your favorite matters are marked in the matters list with an asterisk.
VIEW HISTORY	Opens a page that shows the actions that have been performed on a matter, the date, and the name of the user.
CLOSE MATTER	Select this option to close the matter.
DELETE	Select this option to delete the matter.
WESTLAW, WESTLAW NEXT	If your system administrator has configured this option, you can select these links to go directly to your Westlaw account.

 **Tip** | When there are legal holds associated with a matter, the Tracker matter profile page displays the **Legal Holds Activity** field. You can select the **Legal Holds** tab to show details.

Matter Access:	EXTERNAL LEAD FIRM
Legal Hold Activity:	Linked Legal Hold matters exist. See tab for details.
Incomplete Tasks:	 Missing Firm Fee Arrangement(s)

Managing Matters

1. On the toolbar, select **Save & close**.

 **Required role** | Only a Tracker Coordinator can delete a matter.

ADDING MATTER PARTICIPANTS

Your ability to open or work with matters depends on your matter role. Users with the matter role of Matter Administrator must enable access to matters by assigning matter roles to individual users.

An email message is sent to any user added to the matter. No message is sent if you only change a user's matter role or remove the user from the matter.

To add a participant to a matter:

1. Select **Matters > Matter list** in the left navigation.
2. Open the applicable matter and click the **Participants** tab.
3. On the toolbar, click **Add Firm Participant** or **Add Company Participant**. If the matter is an internal matter or an external matter in which the firms are designated as *offline*, you will not see the option to add a firm participant.
4. A list of users appears. You can also search for specific users by clicking into a box to search by name, email, office, or participant tag. If the user you want to add is not listed, contact your Tracker Coordinator.
5. Use the dropdown in the **Selected Matter Role** column to assign matter roles to users. By default, users are assigned the status of No Matter or Report access.
 - To add a user to a matter, select **Matter Reader**, **Matter Editor**, or **Matter Administrator**.
 - To remove a participant select **No Matter or Report Access**.
6. Select **Confirm Users** to review the information before saving.
7. Verify that the user's email address is correct, then select **Save**.



It is possible for users to be added to a matter more than once or have multiple roles in a matter. For example, a user could have been added as a regular user, and also as a delegate of another user. To view all instances of a user's participation in a matter, change the view selector to **Group by User** and click **Change View**.

CREATING A MATTER GROUP

Matter groups let you treat a group of matters as one for budgeting and financial reporting purposes. Using matter groups provides a company with the ability to create company budgets at the matter group level instead of at the matter level. You can also create summary reports of spending for the matter group that includes all matter spending within the group.



Required role | Matter groups are critical to the organization and setup of matters. For security reasons, only Company System Administrators and Office Administrators can create a matter group.

1. Select **Matters > Matter list** in the left navigation.
2. On the toolbar, click **Create group matter**.
3. Complete fields on page 1 of the New Matter Group page. Similar to the process of creating an individual matter, you must complete all the fields on page 1 and select the matter type template to continue to the second page.
4. If you want to define additional settings related to status reports, departmental budgets and reforecasts, and accruals select **View Financial and Status Report Options**.
5. Click **Next** to go to the second page and complete the fields.
6. On the toolbar, select **Save & close**.

MANUALLY ASSIGN A MATTER TO A MATTER GROUP

1. Select **Matters > Matter list** in the left navigation.
2. In the Matter List, click the hyperlinked matter name to open the matter.
3. From the toolbar, click **Edit options**.
4. For the radio button **Does this matter belong to a Matter Group** select **Yes**.
5. Select the group name from the filter menu that appears.
6. On the toolbar, select **Save & close**.

MATTER DOCUMENTS

You can use Legal Tracker to organize the documents associated with matters. Examples of documents include contracts, emails, forms, or research.

FINDING DOCUMENTS

While all documents in Tracker are saved and organized under specific matters, you can also use the Library to search for and view documents across all matters. For example, you can use the search function to see all contracts related to a specific practice group.

1. Click **Library** in the left navigation.
2. Select **Basic Document Search** from the drop-down list.
3. Type the name of the document if you know it, then select **Search**. You can also click **Advanced Search**. Select the appropriate filters and options, then select **Search**.

By default, this view displays the 20 documents you looked at most recently.

MANAGING MATTER DOCUMENTS

The matter **Documents** tab lets you review and manage documents that are associated with a specific matter. Documents include multiple file types, including emails, SOPs, and contracts.

 **Tip** | If you are looking for documents across all matters, use the documents library instead (select **Library** in the left navigation).

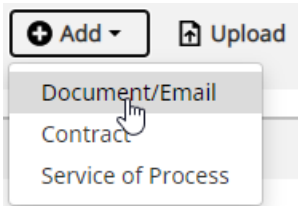
When you open this page, all documents associated with the matter are listed. You can use the drop-down lists in the **Filters** panel to the left to find specific documents. For example, in the second dropdown you can select **Contracts** to filter the list to show only contracts. In addition, you can select an option under **Views** to filter the list by status. For example, the **Needs review** option filters the list to show only the documents that require your attention.



The document folders where files are copied are configured at the company level by a Company System Administrator in **Settings > Document Management Setup > Document Folders**.

Adding a Document to a Matter

1. Select **Matters > Matter list** in the left navigation.
2. Select a matter to open it, then select the **Documents** tab.
3. Select **Add** from the toolbar, then select the document type.



4. On the New document window, complete all required fields and any optional fields as needed. If you add a document by referencing a URL or network location, keep in mind that users can only open the document if they have access to those locations.
5. Click **Save**.

POSTING A NOTE TO A MATTER



To manage matter notes:

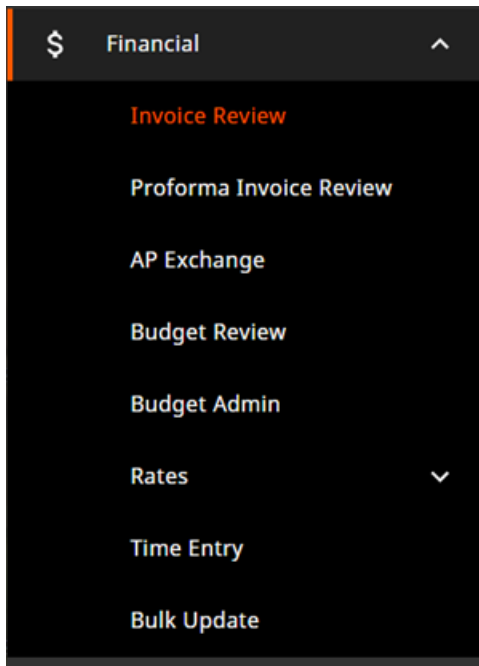
1. Select **Matters > Matter list** in the left navigation.
2. In the list of matters, locate the matter you want to work with and click its hyperlinked name to open it.
3. Select the **Status** tab.

Add a Note to a Matter

1. On the toolbar, select **Create note**.
2. Complete the form.
3. Next to **Access security**, select a button to indicate whether this note will be visible to all matter participants or only company matter participants.
4. If you want to attach a file to the note, you can select **Browse** and select the file.
5. On the toolbar, select **Save & close**.

INVOICING

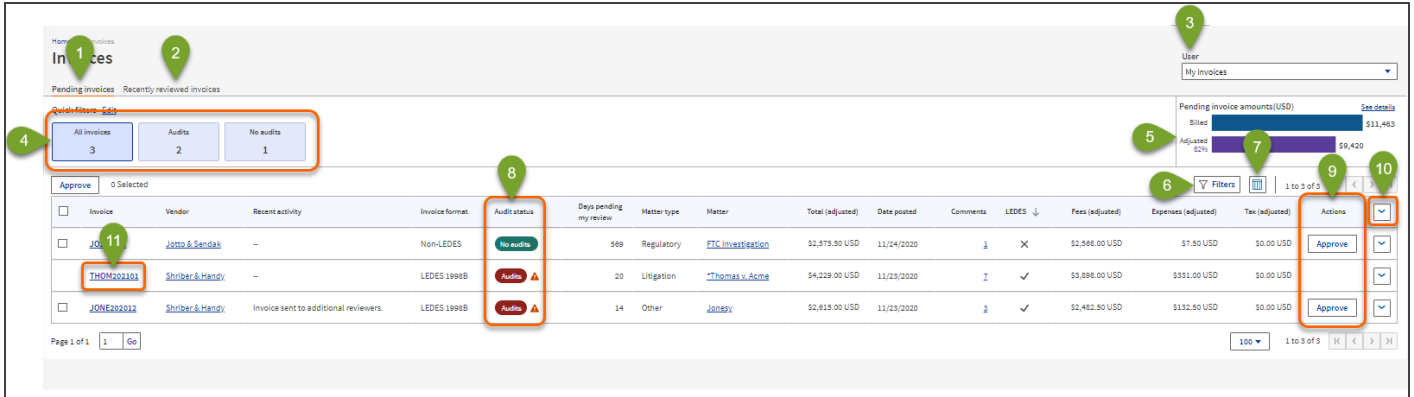
You can find the invoicing functions in Tracker in the **Financial** section in the navigation menu.






REVIEWING INVOICES

 | Select **Financial** > **Invoice Review** to open the Invoices list.

The Invoices List




1. Invoices requiring action appear on the **Pending invoices** tab.
2. The **Recently reviewed invoices** tab lets you quickly access invoices that were reviewed in the last 30 days. This tab shows recently approved, rejected or disputed invoices.
3. Use the dropdown on the top right to select the specific invoices to review. You can show your own invoices, your delegates' invoices, or other users' invoices.
4. **Quick filters** is a set of pre-defined filters that make it easy to quickly find invoices that need your immediate attention. Click a filter button to show only the invoices in that filter. For example, in this illustration the **30+ days old** filter indicates that there are 23 invoices that are more than 30 days old. Selecting this filters shows only those invoices.
5. The **Pending invoice amounts** card shows an overview of totals for your invoices in your preferred currency. By default these are the pending totals. When you apply or remove a filter the totals are recalculated to show the information for amounts included in the filter. You can select **See details** to show a breakdown by fees, expenses, and taxes.
6. Use **Advanced filters** to filter invoices based on additional criteria. When filters are applied a banner appears above the list and shows the filters that are applied and the number of filters.
7. You can select the Column options icon  to customize the columns on this page. You can choose from a list of possible columns and indicate whether the columns appear on the list page or only in the drawer:

- Check the buttons under **Column** for the fields that you want to appear on the page when it opens.
 - If you select **Drawer**, that column does not show on the page but is visible in the drawer when you can click the chevron  to the far right.
 - To hide a field completely, select the button in the **Off** column.
8. The indicator in the **Audit Status** column indicates whether there are audits for the invoice or not, and if there are cleared audits.
 9. In the **Actions** column, select the **Approve** button to the right of invoices you want to approve.
 10. You can select the chevron  at the end of a row in the list to open a drawer that shows supporting information.
 11. You can select the hyperlinked invoice number to open the invoice.

Approving Invoices from the Invoices List

You can approve individual invoices, or select several to approve at the same time. When you approve an invoice, it is removed from the **Pending Invoices** tab and appears on the **Recently reviewed invoices** tab.

 **Tip** | To reject or dispute an invoice, or to make line item adjustments, you must open individual invoices.

APPROVE AN INVOICE

Select the **Approve** button to the right of the invoice you want to approve.

If an invoice is approved without adjustments by every reviewer on the approval route, it is marked as approved and ready to be sent to Accounts Payable. The firm is not notified until the invoice is paid.

APPROVE MULTIPLE INVOICES

Check the checkboxes to the left of the invoices you want to approve, then select the **Approve** button in the header above the list.

The screenshot shows a table of invoices with the following columns: Invoice, Audit status, Days pending my review, Age ↑, and Matter. The 'Approve' button is highlighted in the header, and checkboxes are checked for four invoices.

Invoice	Audit status	Days pending my review	Age ↑	Matter
<input checked="" type="checkbox"/> RVD Pending _Spans Tiers 1 & 2	No audits	32 days	286 days	Matter for Rolling Vol
<input checked="" type="checkbox"/> PendingInvoice	No audits	32 days	256 days	AUT Matter
<input checked="" type="checkbox"/> aTest_Case_42007	No audits	32 days	256 days	AUT Matter
<input checked="" type="checkbox"/> TaxExclusion_Other	No audits	32 days	256 days	TTX Matter Total Spe

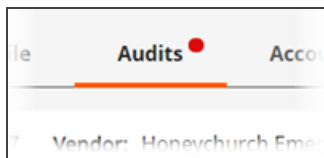
Working with Invoices

1. In the left navigation, select **Financial > Invoice Review**.
2. In the **Invoice** column, select the hyperlinked name of the invoice you want to work with.

Tip | You can also open an invoice by opening a matter and selecting the **Invoices** tab. You can post invoices and approve individual invoices, but to approve all of your pending invoices at once, you must open them from the **Invoice Review** option in the left navigation.

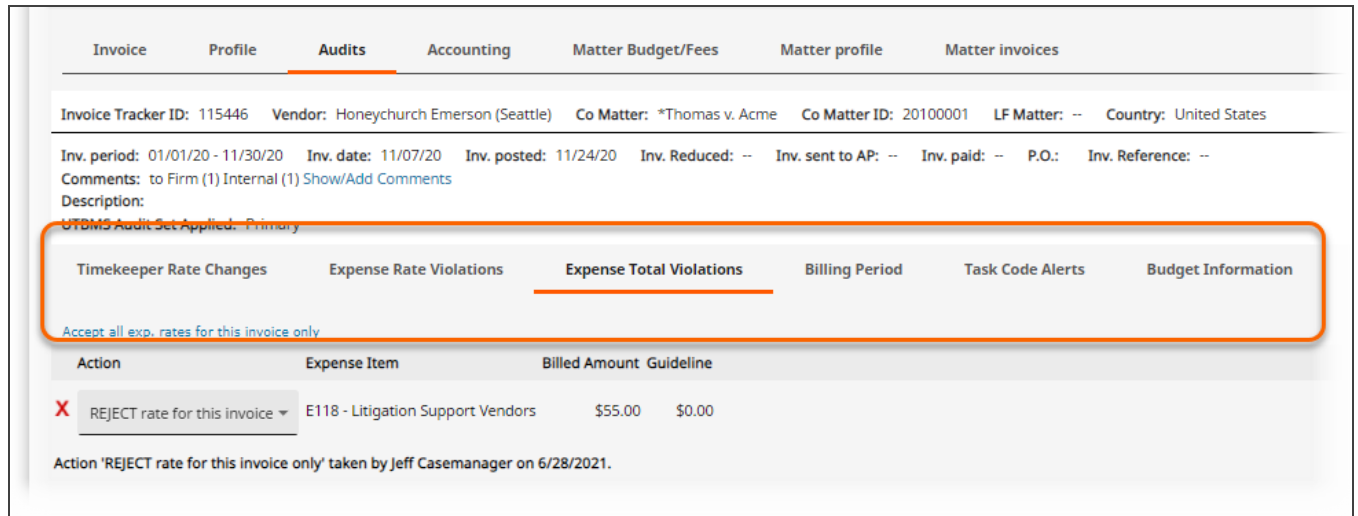
Invoices with Audit Flags

If there are audits associated with an invoice, the **Audits** tab displays a red dot indicator.



The option to approve the invoice is disabled until audits are cleared.

On the Audits page, sub-tabs show details about audit issues.



Rejecting an Invoice

1. Open the invoice you want to reject and select **Reject** on the toolbar.
2. In the dropdown on the window that opens, select a reason from the list. You can also add an optional comment in the **Internal comment** section.
3. If you want to add a comment to the firm, enter your message in the **Firm Comment** area. These firm comments are only shown to the firm after the invoice is finally approved, rejected or disputed.
4. Click **Save**.

If an invoice is rejected by a billing guideline reviewer or Level 1 reviewer, it is immediately returned to the firm. Comments to the firm are required when an invoice is rejected.

If the invoice is rejected at a higher level, it is routed back to all the previous reviewers. At each level, reviewers can agree or disagree with the rejection and add internal comments to other reviewers (which the firm does not see). The Level 1 reviewer adds comments to the firm, and the invoice is then returned to the firm.



When the invoice appears on the prior reviewer's Invoice Review page, it is automatically reduced to \$0.00. If an invoice is returned to you but you do not want the invoice to be rejected back to the firm, do not click **Agree with rejection**. Instead, open the invoice, click **Invoicetab**, click **Disagree and readjust**, adjust the invoice then approve it again.

A Company System Admin who has Invoice Rejector permissions can reject any invoice back to a previous approver, or, in some cases, directly back to the firm.

Rejected invoices are removed from approver queues.



Allowing invoice rejectors is a less strict policy for controlling invoice approvals than when only the current invoice approver is allowed to reject an invoice. Each organization must determine if allowing Invoice Rejectors is compliant with their policies for internal controls.

An invoice can be auto-rejected if your System Administrator has configured your audits and guideline rules to do so. The law firm can then correct and resubmit the invoice.

Disputing an Invoice

1. Open the invoice you want to dispute and select **Dispute** on the toolbar.
2. On the window that opens, type an explanation in the **Firm Comment** box (required). The law firm will be able to see this comment after the invoice is finally approved, rejected, or disputed. You can also add an optional comment in the **Internal comment** section.
3. Click **Save**.

RECENTLY REVIEWED INVOICES

The **Recently reviewed invoices** tab shows the list of the invoices that have been approved, rejected, or disputed in the last 30 days. Invoices requiring attention originally appear in the list on the **Pending invoices** tab. When they have been processed, they are removed from the **Pending Invoices** tab and appear here.

Home > Invoices

Invoices

Pending invoices Recently reviewed invoices


Quick filters

1 Last 7 Days
9

2 Last 30 Days
9

Invoice	Invoice status	Current approver	Matter	Vendor	Approval route	Recent activity	Total	Comments	Actions
FuturePendingInvoice1	Pending	ARLevel2Last, ARLevel2First	AJT Matter AR2WithACR	Firm.zenvo	AR2WithACR	--	\$300.00 USD	2	3
FuturePendingInvoiceOtherMatter	Pending	ARLevel2Last, ARLevel2First	AJT Matter ARBGR012	Firm.zenvo	ARBGR012	--	\$300.00 USD	2	4
TaxExclusion_NonLedesMultiTax	Approved	--	TTX Matter.Total Spending	Firm.zenvo	AR1	--	\$1,650.00 USD	3	Unapprove
RVD Pending _Spans Tiers 1 & 2	Approved	--	Matter for Rolling Volume Discount	RollingVolDisc.zenvo	AR1	--	\$333.33 USD	3	Unapprove
*01-inv	Rejected	--	*001	Firm.zenvo	AR1_withBGR	You rejected the invoice	\$420.00 USD	3	
*02-inv	Rejected	--	*001	Firm.zenvo	AR1_withBGR	You rejected the invoice	\$800.00 USD	3	

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1. **Quick filters** help you quickly find specific types of invoices. For example, in the illustration the **Last 7 days** filter indicates that there are 9 invoices that have been reviewed in the past week.
2. The **Invoice status** column shows the action that was taken on the reviewed invoices.
3. Select the chevron  at the end of a row in the list to open a drawer that shows supporting information.
4. You can select the **Unapprove** button to the far right of an approved invoice to reverse the invoice approval.

UNDERSTANDING SYSTEM AND MATTER ROLES


When a new user is added to Legal Tracker, they are assigned a *system* role. The system role determines a user's system-wide access and permissions, such as the ability to create new users and create matters.

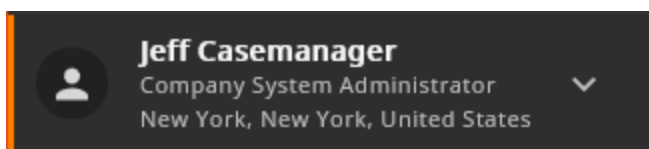
In addition, when a user is added as a participant in a matter, they are assigned a *matter* role, which determines their access to that particular matter. A user's matter role can vary depending on which matter the user is accessing. For example, a user might be a Matter Administrator in one matter and a Matter Reader in another matter.

A user's system role and the matter role in each matter are unrelated. For example, a user can have a system role of Matter Creator, but be given access to a matter as a Matter Reader.

SYSTEM ROLES

Every Tracker user is assigned a system role, which determines the system-level activities they can perform. For example, the system role determines whether a user can add or deactivate users or post invoices to any matter. System roles determine user access to information, as well as permissions for certain actions across all matters in Tracker.

To view your Tracker system role, hover over the **Account** icon  in the left navigation. The expanded navigation pane shows your name, system role, and location.



System Roles for Company Users

SYSTEM ROLE	DESCRIPTION
Company System Administrator	<p>Company System Administrators have full access to all matters and all setup pages. They also have privileges to do nearly everything in the system. This system role should be used as sparingly as possible.</p> <p>If a user needs access to all matters, consider adding them as a Company User, Matter Creator, or Company Office Administrator, then grant them special matter access to all matters.</p>
Company Office Administrator	<p>Company Office Administrators can administer user accounts assigned to their own office. This means they can add users, deactivate users, and change a user's system role. They can be designated as an office or region Tracker Coordinator, which makes them the first support contact for their office or region. However, even though they can administer users, they do not have access to the System Setup area in Tracker. By default this user does not have access to any matters.</p>
Company Matter Creator	<p>This is a regular company user who has the ability to create matters. This user will be added as a direct matter participant to all the matters they create.</p>
Company User	<p>This is the standard company user who does not have the ability to create matters. By default this user does not have access to any matters.</p>

System Roles for Law Firm Users

SYSTEM ROLE	DESCRIPTION
Law Firm Administrator	<p>When a company creates a new firm account in Tracker, the first user for that law firm is automatically assigned the role of Firm Administrator.</p> <p>A Firm Administrator can:</p> <ul style="list-style-type: none"> • Create, edit, and deactivate user accounts for the entire firm • Reset passwords for any user in the firm • Edit the firm profile • Post invoices to any matter <p>Unlike the System Administrator for a company, a Firm Administrator cannot access data, other than financial information, for all matters.</p> <p>Only a user with the system role of Law Firm Administrator can assign this role.</p> <p>For security reasons, law firms should have a limited number of Firm Administrators.</p>
Firm Office Administrator	<p>Each firm office can have a user designated as the Firm Office Administrator, and if a firm has more than one office, each office must have a Firm Office Administrator. Users with this role can:</p> <ul style="list-style-type: none"> • Create, edit, and deactivate user accounts for that office only • Reset passwords for users in that office only • Post invoices to any matter <p>Although the Firm Office Administrator can post invoices to any matter, the Firm Administrator can limit the Office Administrator to viewing only the invoices and attachments from that office.</p> <p>Only a user with the system role of Law Firm Administrator can assign this role.</p>

<p>Firm User + Billing (Firm Billing Manager in earlier versions of Tracker)</p>	<p>This is a regular firm user who also has rights to post invoices to any matter. Typically, this system role is assigned to billing clerks. For small firms, all users might be given this role so that everyone has the ability to post invoices to all matters and to view all invoices in the system.</p> <p>A firm user who also has billing access can post invoices to any matter, but their other activities in Tracker are limited by their matter roles, and can vary for each matter.</p> <p>Only a user with the system role of Law Firm Administrator can assign this role.</p>
<p>Third-Party Biller</p>	<p>A third-party biller is engaged by the law firm, usually as an outside vendor, to submit invoices on behalf of the firm. A third-party biller can post invoices to any matter but does not have access to other matter information.</p>
<p>Firm User</p>	<p>This system role should be assigned to most users, such as attorneys, legal assistants, and paralegals. These users can be given access to matters and can post invoices only to the matters to which they have been granted access. Firm users do not have any system tasks or responsibilities, and their activities in Tracker are limited by their matter roles, which can vary for each matter.</p>

MATTER ROLES

Every matter participant is assigned a matter role. The matter role specifies the user's rights and limitations as to what the user can do in the matter. Company users and law firm users have slightly different permissions and matter roles.

ROLE	COMPANY USER PERMISSIONS	LAW FIRM USER PERMISSIONS
Matter Admin.	<ul style="list-style-type: none"> • Add or delete matter participants • Add, edit, or delete information • View matter information and options • Close matters • View matter audit history 	<ul style="list-style-type: none"> • View, input, or edit all information in the matter that is accessible to the firm • Delete documents or notes posted by the firm • Delete invoices have not been approved • Add or delete law firm matter participants
Matter Editors	<ul style="list-style-type: none"> • Add or edit information (but cannot delete items such as documents, notes, etc.) • View matter information 	<ul style="list-style-type: none"> • View, input, or edit all information in the matter that is accessible to the firm
Matter Reader	<ul style="list-style-type: none"> • View matter information 	<ul style="list-style-type: none"> • View all information in the matter that is accessible to the firm
Report-only	<p>Company Users Only</p> <ul style="list-style-type: none"> • No access to the matter via the Matters button • Run reports against matter information 	
Billing Only	<p>Law Firm Users Only</p> <ul style="list-style-type: none"> • View limited matter profile information. (For example, matter name, lead outside counsel if with your firm, firm fee arrangement for the matter, your firm's incomplete tasks for the matter.) • View budget data • Post invoices • Delete invoices that have not been approved • View the list of matter participants <p>This role has <i>no ability</i> to view other data such as status reports, notes, documents or other matter data.</p>	

Viewing a User's Matter Role

To see a particular user's matter role, access the matter, then select the **Participants** tab. The list of matter participants appears, along with each participant's matter role.

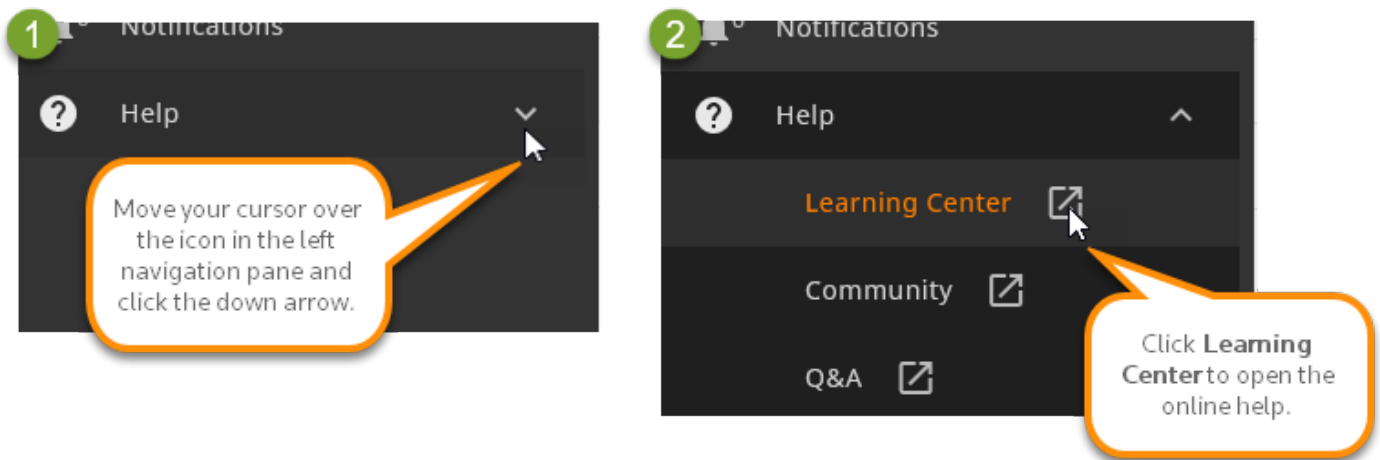


A user with multiple matter roles has the highest available matter access. A user can be added to a matter more than once. For example, assume a user has been added to a matter as a matter reader and also has access to a matter as the delegate of another matter participant who is a matter editor. The user's name will appear twice—both as a matter participant and as a delegate—and the user will have matter editor access.

ADDITIONAL RESOURCES

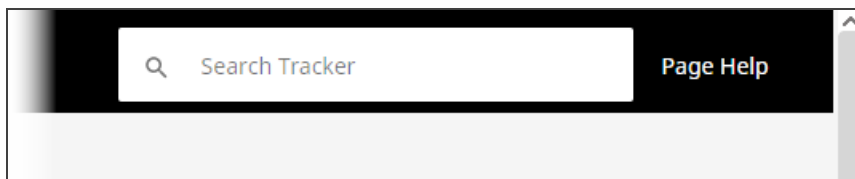
ONLINE HELP

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. You can type a phrase in the Search box or use the menu pane at the left to navigate to help find topics.

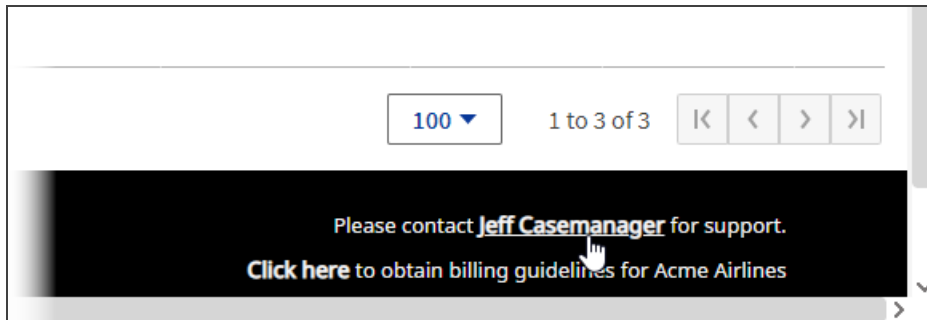
Additional page-specific help is available on selected pages in Tracker. When available, click **Page help** at the top of a Tracker page to open a topic with specific information for the page you are viewing.



SUPPORT

You can find the name of the person to contact for support in the lower left of any page in Legal Tracker.

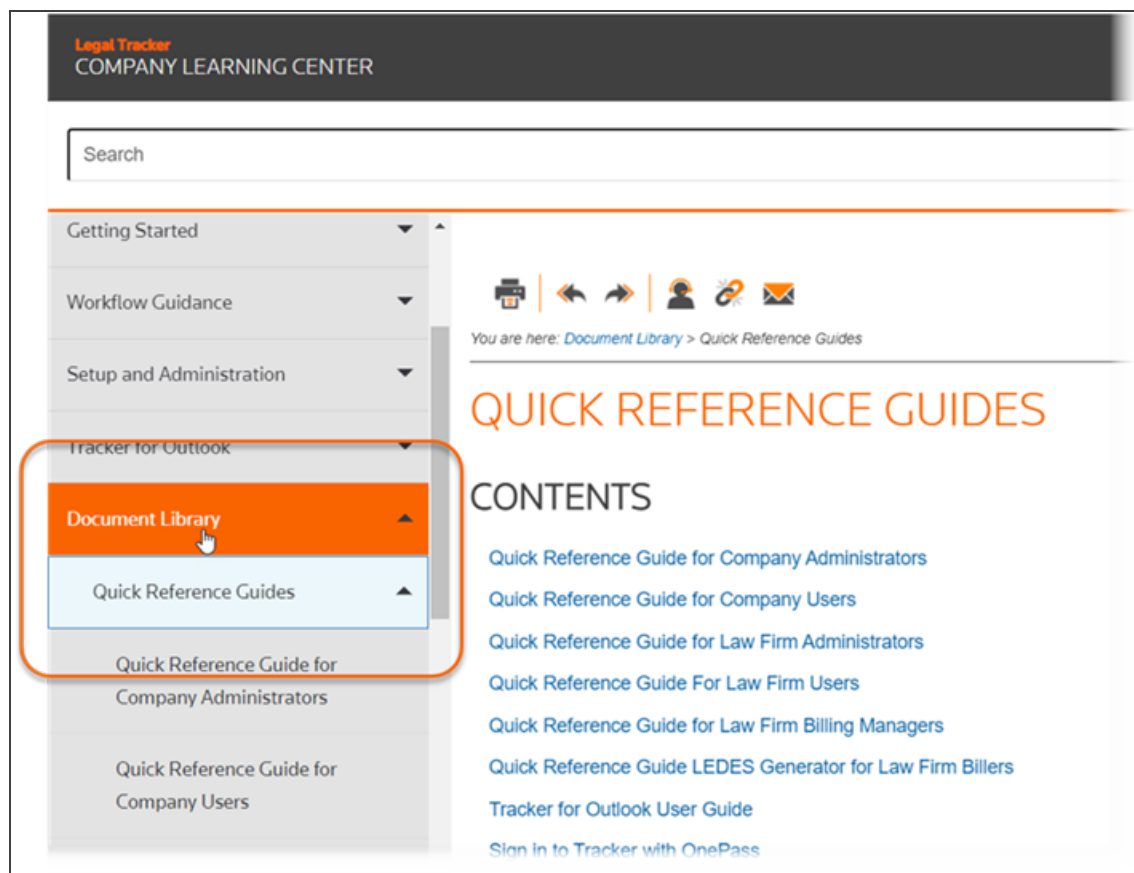
Selecting their name opens the page with the support person's contact information.



DOCUMENT LIBRARY

The *Quick Reference Guide for for Company Users* and other guides are available in the Learning Center Document Library. Quick Reference Guides provide step-by-step instructions on the basics of how to use Legal Tracker. You can find printable information on the most important information to get you started using Legal Tracker.

The Quick Reference Guides are in .PDF format and can be viewed online in your browser or downloaded to your computer.



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](https://corp-legal-training.thomsonreuters.com/) 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.