THOMSON REUTERS LEGAL TRACKER

QUICK REFERENCE GUIDE

LAW FIRM USERS

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.

TABLE OF CONTENTS

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.

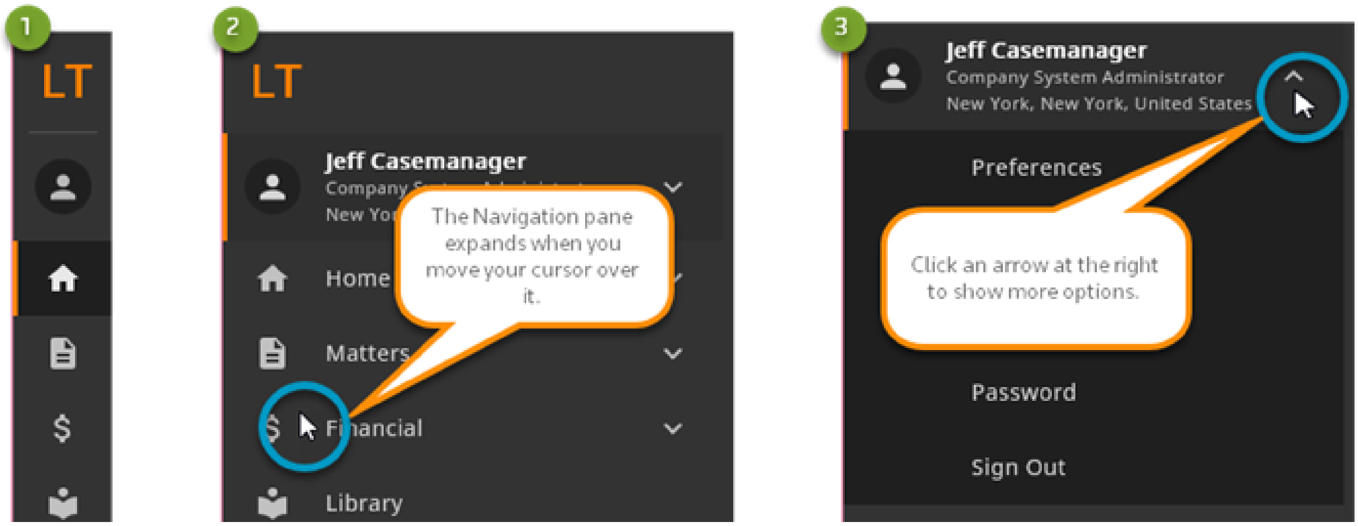
The Tracker platform is a native web-based application. All you need is an internet connection and a browser. We recommend you use one of the following browsers for best results:

- 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.

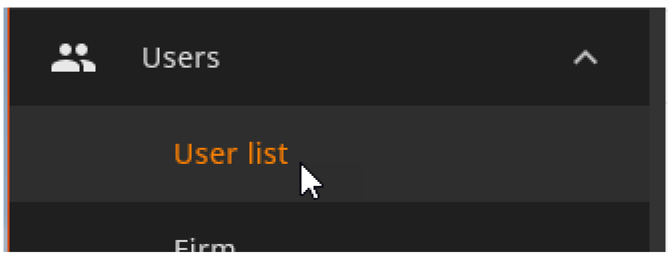


UPDATE LAW FIRM INFORMATION

Your client will set your firm up in Tracker and list your firm, firm offices, and all firm attorneys in the Tracker Worldwide Directory of Firms, which is available to all Tracker clients. Your firm is then responsible for ensuring this information is correct and up to date.

WORKING WITH USERS

You can access most of the tasks associated with matters in the **Users** module.



Lead and Backup System Administrators play crucial roles in the administration of all of your firm's matters that are managed in Tracker. Lead and Backup System Administrators are not client-specific and must be capable of managing Tracker across all matters.

The Lead System Administrator must also be assigned the Firm Administrator system role.

1. Click **Firms > Firm** in the left navigation.
2. Click **Edit firm profile** in the toolbar.
3. Under **FIRM SETUP**, click **Select** for the **Lead System Administrator** or **Backup System Administrator** field.
4. Complete one of the following:
   - Search for the user you want to make the Lead or Backup System Administrator by entering the user's first and/or last names in the **First Name** and/or **Last Name** fields then clicking **Go**.
   - Show a list of users by selecting **Show Lists**, selecting the list of users you want to display then clicking **Go**.
5. Click the name of the user you want to make the Lead or Backup System Administrator.
6. Click **Save & close** in the toolbar.

By selecting the Lead and/or Backup System Administrator, you are representing and warranting that the person selected has the authority to be the System Administrator for the entire law firm.

MANAGE USERS AND USER PROFILES

As the administrator for your firm, you are responsible for setting up users, managing passwords, and keeping their profile information up to date.

EDIT A USER'S ADMINISTRATIVE PROFILE

There is a difference between a user's administrative profile and a user profile. Each user has a user profile, which includes general contact information such as the user's address and phone number. Each user also has an administrative profile, which includes the designation of the user's system role.

- Company System Administrators can update the user administrative profile for company users.
- Firm Office Administrators can update the user administrative profile for firm users.
- Firm Office Administrators can edit administrative profiles only for users in their own office.

1. Click **Users > User list** in the left navigation. The list of users displays. If you do no see the user, select the office from the first view selector then click **Change view**.
2. Click **Edit** for the user whose administrative profile you want to edit.
3. Make the necessary changes to the user's administrative profile. For details, see Field help.

   Each person's user ID is the email address that you provide for the user. If you update a person's email address, it will also update the person's user ID, and the user will be required to set a new password. The Tracker system will send an email message with details of the change to both the old email address and the new email address.

4. Click **Save & close** in the toolbar.

REVIEW YOUR USER ADMINISTRATIVE PROFILE SETTINGS

If you are a company or firm user, you can review the settings of your user administrative profile. Contact your Company System Administrator or Firm Office Administrator if you have questions about these settings.

To review your user administrative profile settings, click **Account > Admin**.

DEACTIVATE USERS

When you deactivate a user, you remove the user's access to Tracker and to all matters in the system. To retain important data in the system, you cannot delete users. You can only deactivate them.

When you deactivate a user, that user's delegates no longer have access to the deactivated user's matters and they no longer receive alerts or emails regarding those matters.

Deleting Users

Users cannot be deleted from Tracker. They can only be deactivated. Deactivating a user blocks access to the system and to all matters. Important data that is associated with the user (such as status reports) is preserved. Thus, not allowing users to be deleted prevents important information from being lost.

Deactivate a User

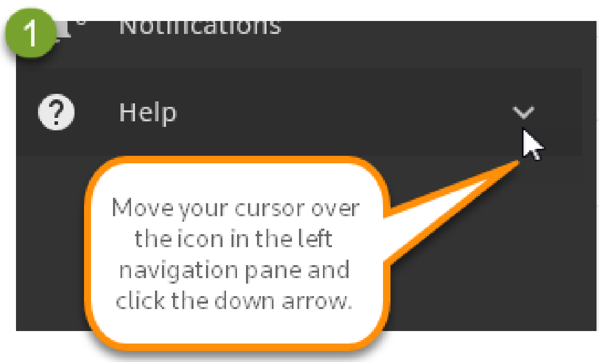
You deactivate a user by editing the user's administrative profile. When you deactivate a user, the user's name remains on the list of matter participants, but displays **User Deactivated** in the **Matter Role** column.

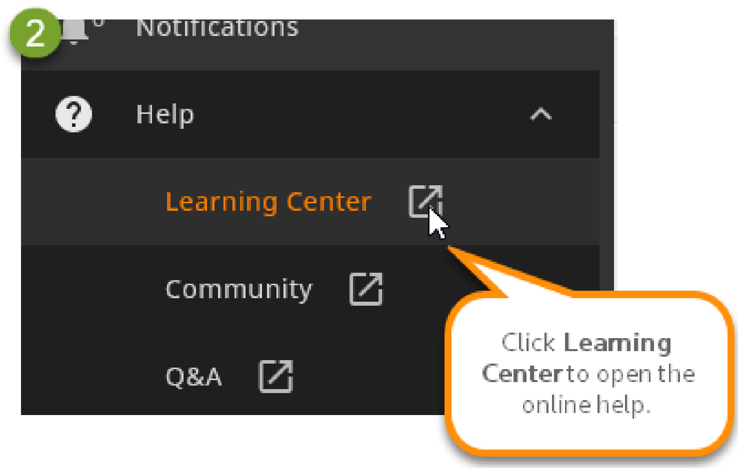
1. Click **Users > User list** in the left navigation. The list of users displays. If you do no see the user you want to deactivate, use the view selectors to select what you want displayed then click **Change view**.
2. Click **Edit** for the user you want to deactivate. The user's administrative profile displays.
3. Click the **Active** check box to remove the checkmark.
4. Click **Save & close** in the toolbar.

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**.



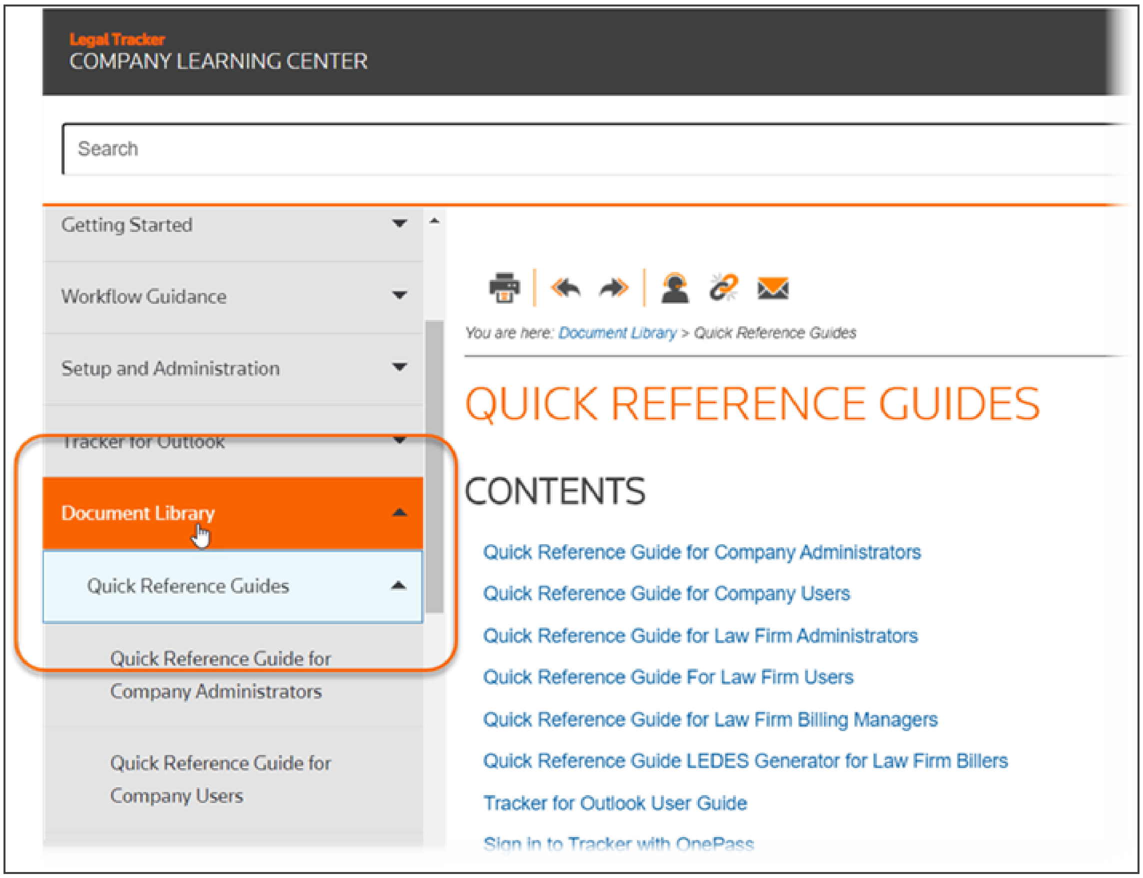


Online help has detailed step-by-step instructions on the tasks you perform in Tracker.

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 Law Firm Users* 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.