

THOMSON REUTERS LEGAL TRACKER

QUICK REFERENCE GUIDE

LAW FIRM USERS

Document Version 2021-1

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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.

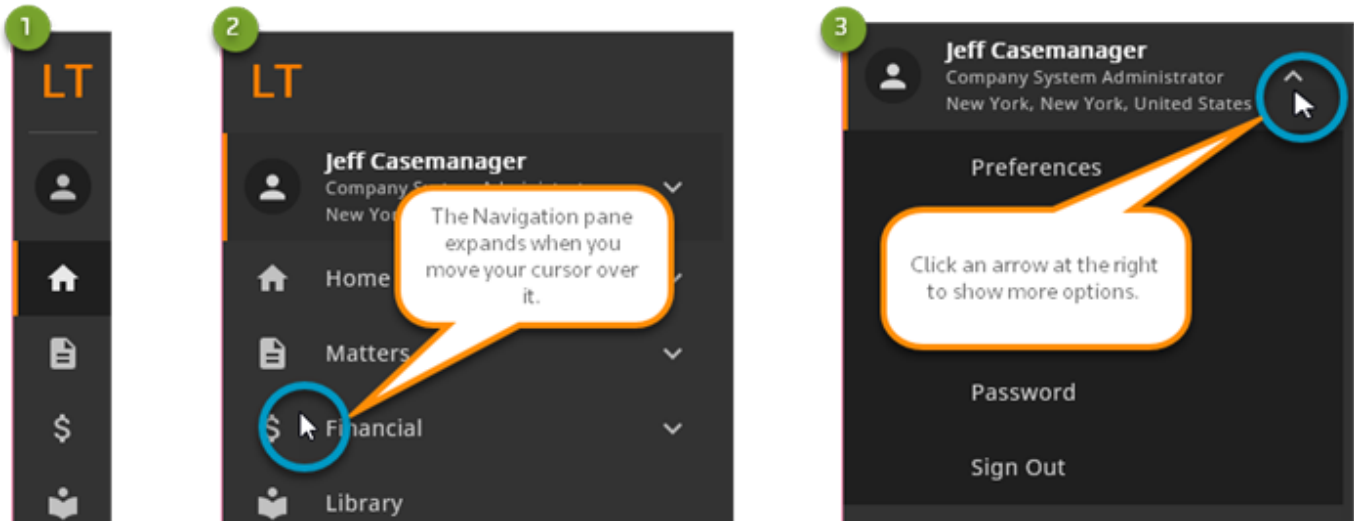
The Tracker platform is a native web-based application. All you need is an internet connection and a browser. We recommend you use one of the following browsers for best results:

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

To learn more about Tracker, visit legaltracker.com.

USING THE NAVIGATION PANE

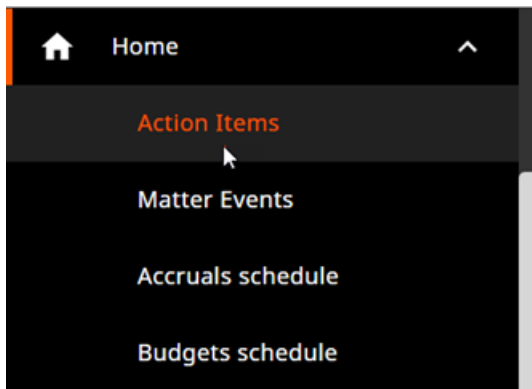
At the left of every page in Tracker is a dark gray bar with icons. When you move your cursor over the bar, it expands to show a menu of the available functions in Tracker. Note that your Tracker screen may look a little different, depending on your Tracker role. If there is a down arrow to the right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



ACTION ITEMS

The Tracker Action Items page brings to your attention matters that may require action or your review. By responding to alerts on this page, you remove the matter from your action items.

The Action Items Menu



 To access your action items, select **Home > Action Items** in the left navigation.

ALERT TYPES


Tracker Action Items provide alerts related to five areas within the system:

<p>UNBILLED AMOUNTS DUE</p>	<p>If your client turned on the Accruals module, unbilled amounts are due either monthly, quarterly or and the end of the client's fiscal year. The banner alert is displayed at the top of the homepage Action Items for any user with a system role of Firm Administrator or Firm User + Billing.</p>
<p>MATTER PROFILE INCOMPLETE</p>	<p>When a new matter is assigned, the lead attorney and his or her delegates receive this action items alert and an email notification. Click the document icon to access the matter profile.</p>

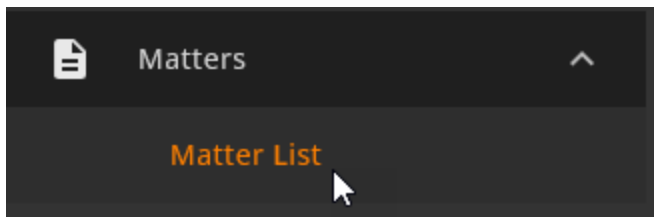
MATTER BUDGETS	<p>There are two alerts for matter budgets:</p> <ul style="list-style-type: none"> • Matter Budget Due: If you are a Matter Editor or Matter Administrator on a matter and a budget is required, Tracker alerts you with a linked number of days overdue. • Matter Budget Modified: If you are a Matter Editor or Matter Administrator on a matter and the company modifies the budget, you receive an alert document icon. From the budget form, you need to acknowledge the changes to the budget.
STATUS DUE	<p>If you are a Matter Editor or Matter Administrator on a matter and a monthly status report is required, Tracker will alert you with a linked number of days overdue. Invoices posted by your firm will receive a status of Delivery on Hold if a status report is due and has not yet been submitted, and invoices will not post to your client's database until the task is complete.</p>
INVOICE ALERT	<p>If you are a Matter Editor or Matter Administrator on a matter and your client rejects or reduces an invoice that was posted to that matter, you will receive an Action Items alert.</p>
DOCUMENT UNREVIEWED	<p>If you are a Matter Editor or Matter Administrator on a matter and any matter participant posts a document with a request for review, you will receive an alert document icon. Document request for review alerts cannot be sent to individual matter participants. They are always sent to all Matter Editors and Matter Administrators.</p>


WORKING WITH MATTERS

You can access most of the tasks associated with matters in the Matters module. 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 the same matter access as that user.

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

The Matters Menu



 To access the workflows described in this section, select **Matters > Matters List** from the navigation pane to open the Matter list page.


FINDING A MATTER

To find specific matters, you can use the dropdowns on the Matter List page, or specify search criteria to locate a matter.

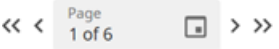
Find a Matter Using Dropdowns on the Matter List

To filter matters by pre-set or custom views, choose an option from the primary view selector above the matter list.

SELECTION	DESCRIPTION
Recently Visited Matters	Displays the last 20 matters you accessed.

SELECTION	DESCRIPTION
My Open Matters	<p>Displays the matters you are responsible for. This is not necessarily a full list of all the matters you can access. A matter will display in this list if:</p> <ul style="list-style-type: none"> You are the Lead Company Person. Another user accessed the matter and specifically granted you access as a Matter Administrator. You are a delegate of a user who has access because of the first or second item listed above. <p>A matter will not display in this list if you have indirect access to the matter only (for example, your only access is because of a special organizational unit or practice group access). To determine if your access to a matter is indirect, open the matter, click Participants, change the first view selector to All Who Have Access then click Change view. If  displays next to your name then you have indirect access to the matter.</p>
All Open Matters I Can Access	Displays all of the open matters you can access.
All Closed Matters I Can Access	Displays all of the closed matters you can access.

Find a Matter Using Search

- Select **Matters > Matter list** in the left navigation. If there are multiple pages of matters or invoices, you can use the page selector to page forward and backward through list. 
- On the toolbar, click **Search for matter**, then enter a value in the **Matter Name** field or enter a value in the **Field to Search** dropdown.
- Click **Generate list**. Tracker shows a list of matters that fit your search request. To access a specific matter from this list, click on the name of the matter.
- If necessary, click **Advanced search**, select from various criteria, then click **Generate list**.

ADD A DOCUMENT OR CONTRACT TO A MATTER

You can add documents or contracts to a matter, control which users can access the documents, and add addenda or other related documents.



Only the Matter Administrators and Matter Editors for the matter can submit a document or contract for a matter.

1. Open the matter you want to work with and select the **Documents** tab.
2. Click **Add**.
3. Select the document type.
4. On the panel that opens, complete the document or contract profile fields.
5. If you want to specify which users can access the document, select an option for **Access Security**.
6. Select one of the following to designate the file attachment:
 - **File**-To attach an electronic copy of the file. Click **Browse** to attach the file.
 - **URL**-To provide a link to a website where the file resides. Enter the URL in the associated field
 - **Network Address**-To specify a corporate network path to a file. Enter the network path in the associated field.
 - **Location/Other**-To describe the physical location of the document. Enter the physical location in the associated field.
7. If you want to request that other matter participants review the document or contract, select **Yes** for **Review Requested** then enter a comment in the **Review Requested Comments** field. When a review is requested, the matter displays in the Action Items for all of the other matter participants.
8. Click **Save**.

View an Addendum or Related Document

Once an addendum or related document is attached, it is listed under **Addenda/Related Files (Secondary Documents)** on the contract profile. To view the addendum:

1. From the contract profile, click the **File Name/URL** link for the addendum or related document you want to view. The profile for the addendum or related document displays.
2. Click the file name in **File Attachment**, save the file to your computer then open it from where you saved it on your computer.

Edit an Addendum or Related Document

To edit an addendum or related document:

1. From the contract profile, click the **File Name/URL** link for the addendum or related document you want to edit. The profile for the addendum or related document displays.
2. Click **Edit**.
3. Make your changes to the addendum or related document profile.
4. Click **Save & Close**.

Delete an Addendum or Related Document

To delete an addendum or related document:

1. From the contract profile, click the **File Name/URL** link for the addendum or related document you want to delete. The profile for the addendum or related document displays.
2. Click **Actions** then select **Delete document**. A message displays to confirm you want to delete the addendum or related document.
3. Click **OK**.
4. Click **Close** when the confirmation message displays.

COMPLETE OR UPDATE THE MATTER PROFILE

1. From the Matter list page, access the matter, then click **Profile**.
2. Click **Edit** in the toolbar.
3. Complete the required fields. Required fields are marked with a red star *****.
4. Click **Save & close** in the toolbar.

ADD A USER TO A MATTER



Only Matter Administrators can add matter participants.

1. From the Matter list page, access the applicable matter.
2. Click **Participants**.
3. Click the **Add firm participants** in the toolbar.
4. Select the user you want to add to the matter. To find the user, you can scroll through the list of firm users or you can use the fields at the top of the pop-up window to limit the user displayed. If the user is not listed, contact your firm's Lead System Administrator and request that the user be added to the system.
5. Select the role type that is appropriate to the matter. For example, if the user only needs to view information, the user should be added as a Matter Reader only. If the user needs to be able to post documents, modify information or approve invoices, the user should be added as a Matter Editor.
6. Click **Confirm users**.
7. Review the user's email address to ensure it is correct.
8. Click **Save**.

REMOVE A PARTICIPANT FROM A MATTER


1. From the Matter list page, access the applicable matter.
2. Click **Participants**.
3. Select **All Who Have Access** in the first view selector, select **Group by User** in the second view selector then click **Change view**. This is important because a delegate may have been granted access to a matter multiple times (for example, once as a direct matter participant and once as a delegate). To ensure the participant is fully removed from the matter, you must change every instance of the user's access to the matter.
4. Click the matter role link for the participant whose access you want to change. The matter role link is in the **Matter Role** column.
5. Select **No Matter or Report Access** from the **Matter Role** drop-down list.
6. Click **Save & close** in the toolbar.

CREATE A DATE OR EVENT

Before creating an event, consult with your client to find out if they have a calendaring policy. Also, it is important to know that certain key dates and events display under **Events** because they were created automatically from the matter profile. For example, when your client created the matter, they may have entered the date of loss or the filing date. In this case, those dates automatically display under **Events**. When you complete the matter profile, more dates and events (such as a trial date) are automatically created.

1. From the Matter list page, access the applicable matter.
2. Click **Events**.
3. Click **Create date/event** in the toolbar.
4. Complete the fields.
5. Click **Save & close** in the toolbar.

EDIT A MATTER BUDGET

 **Required role** | In most cases, only law firm users from the lead firm for a matter can edit the matter budget. This is the case if your client requires a budget from *only* the lead firm. However, if the client chooses to require a budget from *all firms on a matter*, matter editors or higher at any firm can edit the budget, but only the budget for their firm.

To edit the current budget:

1. From the Matter list page, open the applicable matter.
2. Click **Budget**.
3. Click **Edit current budget** in the toolbar. Depending on the type of budget your client company chose, the monthly budget or phased litigation budget form displays.
4. Make your changes to the budget. Keep the following important aspects in mind when working with monthly budgets:

MONTHLY BUDGET	<ul style="list-style-type: none"> • The total matter budget must be equal to or greater than the total amount in the budget spreadsheet. • The budget spreadsheet is organized by fiscal year. • If your client company requires an annual budget instead of a monthly budget, complete the budget spreadsheet for only the first month of the fiscal year. Leave the remaining months blank. • If your client company requires a quarterly budget instead of a monthly budget, complete the budget spreadsheet for the first month of every quarter. Leave the remaining months blank.
PHASED LITIGATION BUDGET	<p>When you work with a phased budget, the first task is to create the time period for each phase. The phases themselves (for example, Initial Case Assessment and Handling) cannot be edited. After the time period for each phase is created, enter the budget (both fees and expenses) for each phase. You can also provide a comment about the entire budget in the field at the top of the budget form.</p>

5. On the toolbar, click **Save & close**.

Compare Budgets

1. Click the name of the applicable matter.



You may need to select **All Open Matters I Can Access** for the view selector.

2. Click **Budget**.
3. Click **Compare to prior budget**.

POSTING INVOICES

Firms can post invoices in Tracker in any format (for example, LEDES, non-LEDES, paper, or electronic) that the company accepts. Companies can set specific invoice currency or format requirements that determine what users see on the Post invoice page. For example, if a company has configured Tracker to require that your firm or office submit only LEDES invoices, the ability to post other formats will be disabled. Likewise, if a company configured Tracker to require that your firm or office submit invoices in specific currencies, you can select only those currencies.

If you are posting a LEDES-formatted invoice, you have the option of posting invoices one at a time or posting multiple invoices at once using SpeedPost. If you are posting a non-LEDES-formatted invoice, you can only post one invoice at a time.

POSTING SPEEDPOST INVOICES

Tracker SpeedPost allows you to post multiple LEDES-formatted invoices at once. To use SpeedPost, the invoice must be in the LEDES format.

To post a Speedpost invoice:

1. Click **Billing** in the left navigation.
2. Click **Post invoices**.
3. Select **LEDES SPEEDPOST UPLOAD**.
4. In the **Law Firm Office** drop-down list, select the office the invoice was generated from.
5. Select the invoice currency from the Invoice currency drop-down list.
 - All LEDES 1998B invoices will be posted in the currency you select in this field.
 - If you need to post 1998B invoices in different currencies, you must manually post each invoice and select the applicable currency for each.
 - If you are uploading LEDES 1998BI invoices, the currency indicated in the invoice file will overwrite any currency you specify here.
6. If you have a receipt or other supporting file that you want to attach to the invoice, click **Browse** next to **Supporting documents**. On your computer, locate and select the file to attach.
7. Click **Post invoices** in the toolbar.

POSTING NON-LEDES INVOICES

To post a non-LEDES invoice:

1. Select **Billing** in the left navigation.
2. Select **Post invoices** in the toolbar.
3. Select **OTHER FILE UPLOAD** to select the invoice format and method for posting the invoice.
4. Click **Post invoice** next to the matter you want to post an invoice for.
5. Complete the fields on the new invoice page. Fields with an asterisk are required.

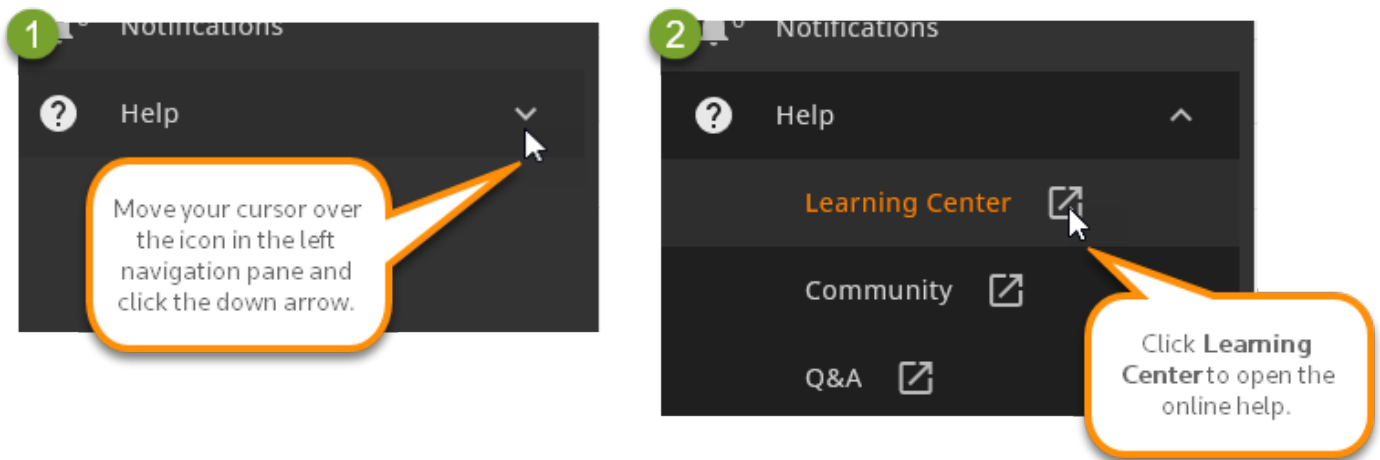
You must include a PDF invoice with non-LEDES invoices. Select **Browse** next to **PDF**. On your computer, locate and select the PDF document to attach.

6. Click **Post & 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**.

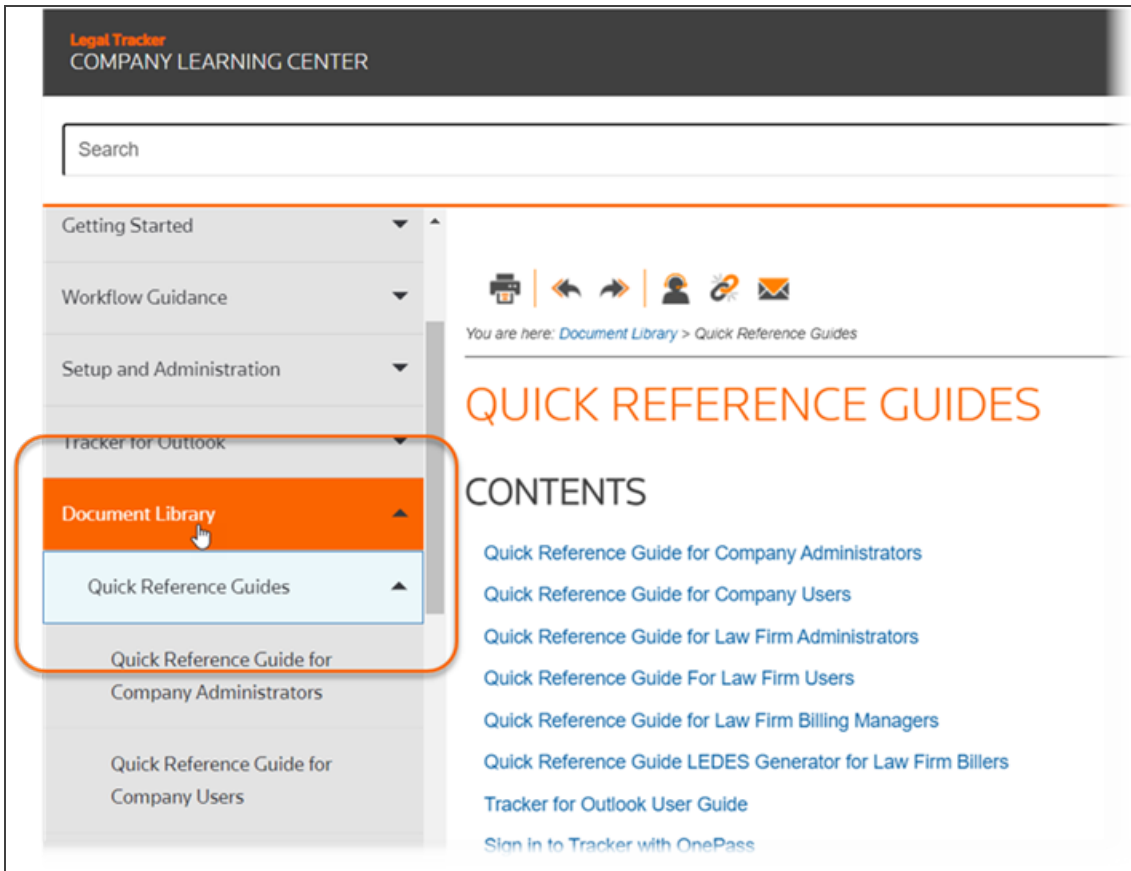


Online help has detailed step-by-step instructions on the tasks you perform in Tracker.

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](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.

