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MONITOR SUITE

USING MONITOR SUITE

Monitor Suite is the foundation of a law firm competitive intelligence program. It provides an unprecedented fact base for client planning, cross-selling, client acquisition prioritization, pitch preparation, merger analysis, and office openings.

Monitor Suite provides strategic intelligence about businesses, industries, practice areas, courts, law firms, lawyers, and judges. You can run searches and generate reports using data from several main components: Litigation, Patent, Trademark, Registrations & Prospectuses, Mergers & Acquisitions, Bonds, Loans, and Private Equity data.

Access Monitor Suite at **www.monitorsuite.thomsonreuters.com**.

Searching Monitor Suite

When you access Monitor Suite, the Search page is displayed. To run a search, complete the following:

1. Select a search category, e.g., *Company*, from the *Search by* drop-down list.
2. Enter your search terms in the field. The search engine is not case sensitive.
3. Click **Look Up**. A list of items matching your search terms is displayed.
4. For each item you want to include in your search, click the **Add** button preceding it.
5. In the left frame, click **Get Results**. The report is displayed.

Searching with the Browse Feature

Some categories allow you to search using the Browse feature, which displays an expandable list of selections to add to your search criteria. To use the Browse feature, complete the following:

1. Select a category from the *Search by* drop-down list, e.g., *Practice Area*.
2. Click **Browse**. The expandable list is displayed.

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3. Click the **arrow** next to an item to expand the list. Continue drilling down the results until you reach your desired selection.

4. Click **Add** next to the selection you want to add to your search criteria. The selected item is displayed in the Search Criteria box.

5. Click **Get Results**. Your report is displayed.

REFINING YOUR SEARCH

After selecting your report criteria, you can refine your report by date as well as specific criteria, such as Practice Area or Law Firm Size.
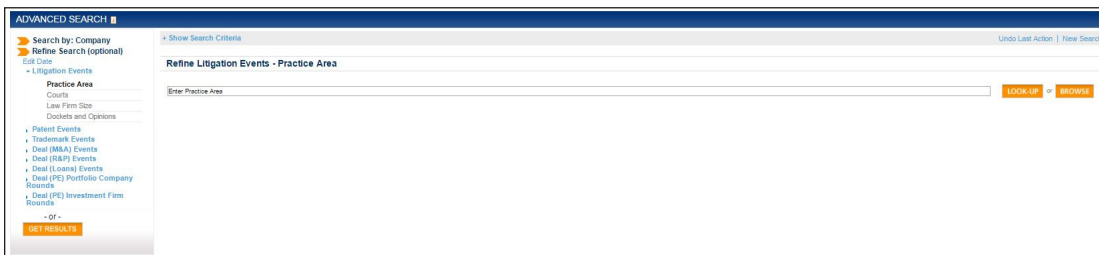
Refining By Date

1. Click **Edit Date** under Refine Search in the left frame. The Date Range page is displayed.

2. Do one of the following:

   • Replace the default dates listed in the start date box, the end date box, or both with new dates, using the mm/yyyy format, e.g., *01/2017*.

   • Click **3m**, **6m**, **1y**, **3y**, or **5y** to set the date range for the last 3 months, 6 months, 1 year, 3 years, or 5 years.

3. Click **Get Results**.

Refining By Specific Criteria

1. Click a specific criteria under Refine Search, e.g., **Litigation Events**.

2. Select a category, e.g., **Practice Area**, and enter the appropriate information on the search page.

3. Click **Get Results**.

Refining By Date After Result

You can also refine your report by date after it has been generated.

1. Click **Show Search Criteria** at the top of the page.

2. In the Search Criteria box, click **edit** to the right of the date range. The date range window is displayed.

3. Do one of the following:

    *   Replace the default dates listed in the start date box, the end date box, or both with new dates, using the mm/yyyy format, e.g., *01/2017*.

    *   Click **3m**, **6m**, **1y**, **3y**, or **5y** to set the date range for the last 3 months, 6 months, 1 year, 3 years, or 5 years.

4. Click **Save**.

Filtering Reports

It's easy to filter sections of your report to include or exclude particular information. Suppose you've retrieved a report for Microsoft Corporation and you've clicked **Law Firm Representation** in the left frame to display the section of the report showing which firms have represented the company. To filter the list of law firms to include or exclude specific firms, do one of the following:

- To include more than one firm, select the appropriate check boxes, select *Include Selected– Display Current Level* from the drop-down list at the bottom of the page, and click **Filter Report**.

- To exclude one or more firms, select the appropriate check boxes, select *Exclude Selected–Display Current Level* from the drop-down list at the bottom of the page, and click **Filter Report**.

The report is now displayed, filtered by the criteria you selected.

Saving a Search or Report

After you create your report, you can save it for use at a later time.

1. On the action bar in the upper right of the search result, click **save**. The save search window is displayed.

2. Enter a search name in the *Name your Search* field.

3. Select the desired search option:

    *   Select **Save Search** to save the exact search.

    *   Select S**ave Search as template** to save only the search criteria.

4. Click **Save**. A confirmation message is displayed.

5. Click **OK**.

Creating a Link to a Report

You can create a link to a report or report section in order to share it with other users within your organization. Links to reports have embedded encrypted passwords, allowing anyone within your organization to access the report without signing on to Monitor Suite. To create a link, complete the following:

1. Run a search, and refine and filter the report as desired.

2. Click **Create Link** on the action bar in the upper right of the search result. A menu is displayed.

3. Click one of the following options:

    *   **Quick link to Report** to create a link to the entire report.

    *   **Quick link to Section only** to create a link to the report section.

    A message is displayed containting the URL for your report or report section.

4. Copy the link, and click **OK**. You can now paste the link into an email or application environment.

CREATING AN ENHANCED PORTAL LINK

To create an enhanced portal link, complete these steps:

1. Click **Create Link** on the action bar in the upper right of your search result. A menu is displayed.

2. Click **Create enhanced portal link**. The Enhanced Portal Links page is displayed.

3. Select a portal link style:

    *   To use the default style template, click **Continue**.

    *   To create a style template, click **Create Style Template**. The Style Templates page is displayed from which you can choose layout and color preferences and name your template. Click **Continue** to move from one section of the style template to the next. When you have finished making your selections, name your template and click **Save**.

4. Add an annotation to your portal link:

    *   Click **Select** to add an existing annotation.

    *   Click **Create New Annotation** to create a new annotation. The Create Annotation window is displayed. When you have finished creating your annotation, click **Save**.

5. When you have finished adding your annotation, click **Create**. A message is displayed containing the URL. The portal link has also been saved in myMonitor.

6. Copy the URL, and click **OK**.

Printing or Exporting a Report

To print or export a report, complete these steps:

1. Click **print/export** on the action bar in the upper right of the search result. A menu is displayed.
2. Click **Print/Export whole report**. The Report Output Options page is displayed.
3. Edit the name of the report in the *Title* field and enter a description, if desired. To include a cover page image, select an image from the *cover page image* drop-down list. You can also upload a new image.
4. Customize the report, if desired. To save the report format to use again, click **Save as a Template**. To use a saved report format template in the future, select it from the *Template* drop-down list.
5. To include an annotation with a report section, click the corresponding **annotation** symbol to the right of the appropriate section in the Report Sections list. A list of annotations is displayed. Click the radio button next to the annotation you want to include. Click **Create New Annotation** to create a new annotation, then click **Save**.
6. Click **Download PDF**. Monitor Suite will generate the PDF, and you can save or print it as desired.

UPLOADING AN IMAGE TO A REPORT

You can upload an image, e.g., a firm logo or insignia, to accompany a report while printing or exporting a whole report.

1. In the Format section of the Report Options page, click the **Upload Image** link. The Cover Page Image Upload window is displayed.
2. Type the name of the image in the *Name your cover image* field.
3. Click **Browse** and choose the image you want to upload.
4. Select the image and click **Open**. The path and file name for the image is displayed in the *File* field.
5. Click **Upload**. A confirmation message is displayed.

The new image will now appear in the *Cover Page Image* drop-down list for you to add to the report.

Customizing a Report

You can customize a report to include only the information that fits your needs. On the Report Sections page, you can exclude sections from a report, reorder sections of a report or the individual rows within a section, and remove sections and rows from a report.

EXCLUDING ONE OR MORE SECTIONS WITHIN A REPORT

By default, all sections are included in a report. To exclude one or more sections, deselect the check marks next to the sections you want to exclude under Report Sections. As you exclude sections, they are grayed out.

REORDERING SECTIONS WITHIN A REPORT

Under Report Sections, click on the section you want to move and drag-and-drop it to the desired location.

Printing a Report Section

1. Click **print/export** on the action bar in the upper right of the search result. A menu is displayed.
2. Click **Print/Export this section**. The Choose Output window is displayed with the Adobe PDF option selected.
3. Click **Download**. Monitor Suite generates the section PDF, and you can save or print it as desired.

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