



## WHAT ARE THE MAIN FEATURES OF THOMSON REUTERS LEGAL TRACKER?

Thomson Reuters Legal Tracker™ (formerly Serengeti Tracker™) organizes your key information in a secure, online workspace that you share with outside counsel. It includes all of the features necessary for you and outside counsel to manage legal projects, including spending, budgets, documents, and deadlines.

### ELECTRONIC BILLING

Process electronic invoices in any format (LEDES, Microsoft® Word, Adobe® PDF) from 100% of your firms – small and large, foreign and domestic.

INVOICE AUDITING	<ul style="list-style-type: none"> <li>Automatically or manually enforce timekeeper rates, expense compliance, and other billing guidelines</li> </ul>
APPROVAL ROUTING	<ul style="list-style-type: none"> <li>Auto-route to preset approvers; add reviewers ad hoc</li> </ul>
OVER-BUDGET SPENDING ALERTS	<ul style="list-style-type: none"> <li>For month, fiscal year, life of matter, or phase</li> </ul>
CURRENCY CONVERSION AND TAX	<ul style="list-style-type: none"> <li>Amounts displayed in your preferred currency</li> <li>Foreign and domestic taxes tracked separately</li> </ul>
INVOICE DATA TRANSFER TO AP	<ul style="list-style-type: none"> <li>Configurable fields for extract to accounts payable</li> <li>Web Services-enabled for automatic data transfer</li> </ul>
TASK CODE ALERTS	<ul style="list-style-type: none"> <li>Create and set budgets based on UTBMS task codes and custom task code sets</li> </ul>

### MATTER AND IP MANAGEMENT

Track just the information you need, collected at the source and organized for quick retrieval.

DASHBOARD	<ul style="list-style-type: none"> <li>Alerts of case developments and upcoming deadlines</li> </ul>
CUSTOMIZABLE TEMPLATES	<ul style="list-style-type: none"> <li>Customize information tracked for different types of legal projects</li> <li>FAS 5 loss contingency tracking</li> <li>IP-specific fields for filing dates, inventors, status, etc.</li> </ul>
ENFORCEMENT OF REQUIREMENTS	<ul style="list-style-type: none"> <li>Notification to firm that bill will not be processed until required budget, status update, etc., is provided</li> </ul>
STATUS REPORTING	<ul style="list-style-type: none"> <li>Optional or required – captures key developments from outside counsel on a monthly or quarterly basis</li> </ul>
RESULTS	<ul style="list-style-type: none"> <li>Track matter outcome, duration, predictive accuracy, and lessons learned</li> </ul>
EVALUATIONS	<ul style="list-style-type: none"> <li>Evaluate and compare performance of outside counsel</li> </ul>

# MAIN FEATURES OF THOMSON REUTERS LEGAL TRACKER

## CONTRACT AND DOCUMENT MANAGEMENT

Manage all of your documents and contracts online with one collaborative system.

FILEZONE	<ul style="list-style-type: none"> <li>• Pull documents, files, and emails directly from the desktop or network into Legal Tracker matters</li> </ul>
KEY INFORMATION ABOUT CONTRACTS	<ul style="list-style-type: none"> <li>• Store drafts, notices, correspondence, and amendments</li> <li>• Collect data about parties, terms, renewals, etc.</li> </ul>
DATES AND EVENTS NOTIFICATION	<ul style="list-style-type: none"> <li>• Set notifications for key dates and events, such as renewals and deadlines</li> </ul>

## BUDGETING AND ACCRUALS

Use budgeting and unbilled time reporting to capture spending estimates directly from your firms.

LAW FIRM BUDGETS	<ul style="list-style-type: none"> <li>• If required budget is overdue, firm's bills are held</li> <li>• Automatic spending-to-budget comparisons</li> </ul>
PHASED OR FISCAL YEAR	<ul style="list-style-type: none"> <li>• Budget by time period or litigation/IP phase</li> </ul>
DEPARTMENTAL BUDGET	<ul style="list-style-type: none"> <li>• Roll up project budgets and spending into internal budget</li> <li>• Quick reforecasting for unanticipated events</li> </ul>
ACCRUALS FOR UNBILLED TIME	<ul style="list-style-type: none"> <li>• Firms input unbilled time and estimated spending</li> </ul>

## REPORTING AND TRENDING

Produce reports that analyze budgets and spending, summarize key information, and identify developing trends.

REPORT GENERATOR	<ul style="list-style-type: none"> <li>• Hundreds of reports with easy-to-use filters</li> <li>• One-click drill-down reporting for additional detail</li> <li>• Trend analysis showing changes over time</li> </ul>
REPORT SCHEDULER	<ul style="list-style-type: none"> <li>• Automated reporting that runs and emails reports to users as scheduled</li> </ul>
CUSTOM EXPORTS	<ul style="list-style-type: none"> <li>• Fully customizable exports for presentations, graphs, and so on</li> </ul>
MY REPORTS	<ul style="list-style-type: none"> <li>• Save criteria for quick generation of periodic reports</li> </ul>

## LEGAL ANALYTICS

Configurable individual and peer benchmarking tool with real-rate data.

RATE EVALUATOR	<ul style="list-style-type: none"> <li>• Compare and contrast the true impact of proposed rates before entering negotiations with your firms</li> </ul>
ANALYTICS	<ul style="list-style-type: none"> <li>• Reveal how client relationships have evolved and expose areas that need attention</li> <li>• Leverage current market rate trends based on real – not stale – statistics</li> <li>• View markdowns by area of law or matter type compared to industry benchmarks</li> <li>• Analyze your department's and law firm's performance against industry benchmarks using report cards</li> </ul>
TIMEKEEPER RATE REVIEW	<ul style="list-style-type: none"> <li>• Easily review, adjust, and approve the proposed billing rates from a law firm on one page, including historical data</li> </ul>

## SERVICE OF PROCESS

Automatically retrieve and route S.O.P. documents and information directly into your matters.

AUTOMATED DOWNLOAD	<ul style="list-style-type: none"> <li>• Data retrieved directly from your registered agents</li> </ul>
INTAKE	<ul style="list-style-type: none"> <li>• Automatic routing to existing matter or delivery to new matter</li> </ul>
AUTO-ASSIGNMENT AND CALENDARING	<ul style="list-style-type: none"> <li>• Assign documents to responsible user, including deadline alerts</li> </ul>

## INTERNAL TIME ALLOCATION

Capture internal legal costs to assess department performance.

QUICK CAPTURE	<ul style="list-style-type: none"> <li>• Input time by hour or percentage of week</li> </ul>
REPORTING	<ul style="list-style-type: none"> <li>• Compare outside versus internal cost; allocate to business units</li> </ul>

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