Legal Department Management

Legal Tracker

2017 Enhancements

The intelligence, technology and human expertise
you need to find trusted answers.

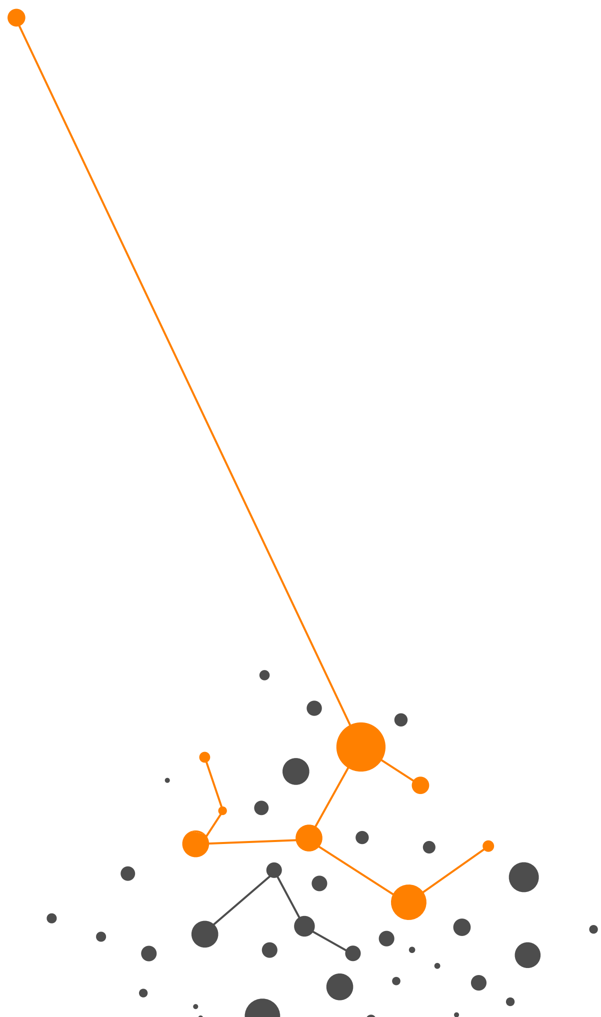
the answer company™
THOMSON REUTERS®

Overview

Legal Tracker is a legal department management system that features powerful matter management, e-billing and reporting functionality. Suitable for departments of all sizes, the online platform provides in-house legal teams with greater visibility over their legal work and transparency over costs.

We would like to provide an insight into the work that we, at Thomson Reuters, have been doing to ensure that Legal Tracker remains invaluable to the work that you do.

In consultation with our customers, we have introduced new functionality, developed existing features and streamlined the navigation. We have also delivered countless bespoke training sessions and a wealth of support materials for users.



Behind the scenes

Tailoring training and support

To help users make the most of our solutions, we delivered comprehensive and tailored training sessions to suit each organisation's needs. We also provided first class support to customers via phone, email and face-to-face throughout the year.

Enabling further integration

We continued to integrate Legal Tracker with reputable third party applications such as Microsoft Outlook to help users obtain greater value from their subscriptions and our legal solutions.

Keeping users informed

With plenty of enhancements to our solutions in 2017, we have worked to ensure that users remain informed of developments and experience the full benefit that these changes bring. To help achieve this, we invited customers to attend our inaugural product conference, Generate 2017, and re-launched our product development blog, Broadcast.

Acting on feedback

With plenty of enhancements to our solutions in 2017, we have worked to ensure that users remain informed of developments and experience the full benefit that these changes bring. To help achieve this, we invited customers to attend our inaugural product conference, Generate 2017, and re-launched our product development blog, Broadcast.

Streamlining operations

We streamlined our internal operations and adopted a more global approach to product management and development, with the aim of improving efficiency, fast-tracking innovation and aligning our solutions for customers.

Find out the latest news

Read Thomson Reuters Legal product development blog, Broadcast, to stay informed of upcoming changes to our legal solutions, new enhancements due to launch and key content additions.

To receive the next Broadcast newsletter, please sign up at legal-solutions.co.uk/newsletter

Did you know?

Customer training

In 2017, we held a wealth of online and face-to-face training sessions for users across our legal solutions. Here are a few of the highlights:

WE TRAINED OVER
14,750
END USERS*

*(excluding students) a 30% increase on 2016

WE DELIVERED OVER
14,050
TRAINING HOURS IN 2017

WE CREATED OVER
85
GENERAL AND
350
SPECIALIST TRAINING MATERIALS FOR USERS

OVER
40%
OF SESSIONS COVERED MORE THAN ONE LEGAL SOLUTION

98%
OF USERS TRAINED SAID THEY WOULD RECOMMEND TO A COLLEAGUE AND
97%
SAID THEY LEARNED SOMETHING NEW

98%
OF USERS TRAINED SAID THEY FOUND THE ONLINE SOLUTION MORE VALUABLE IN THEIR DAY-TODAY ROLES

To book a training session for users in your organisation, please email trainingrequest@thomsonreuters.com or contact your dedicated Account Manager.

*Figures included from January 2017 – November 2017.

Award winning

We are delighted that Thomson Reuters was voted #1 in the inaugural Global Alternative Legal Brand Index published by Acritas this year. The index was calculated on three measures: being top of mind as an alternative provider of legal services among in-house legal departments, being most favoured, and delivering innovative products and services.

> Thomson Reuters' investment in technology is coming through strongly as the underlying reason why senior in-house counsel are attracted to their offer. Their products and services are enabling legal departments to innovate and drive efficiency in how they organize and conduct their legal work.

Lisa Hart Shepherd

CEO of Acritas, Acritas' Global Alternative Legal Brand Index 2017

Source: Acritas Research Ltd, Acritas Global Alternative Legal Brand Index 2017

Highlights

Throughout 2017, we worked closely with customers to enhance Legal Tracker, through seasonal releases, to better serve your needs. The enhancements have been categorised under three key themes; reporting and dashboards, user experience, and innovation and integration.

Reporting and Dashboards

Reporting enhancements

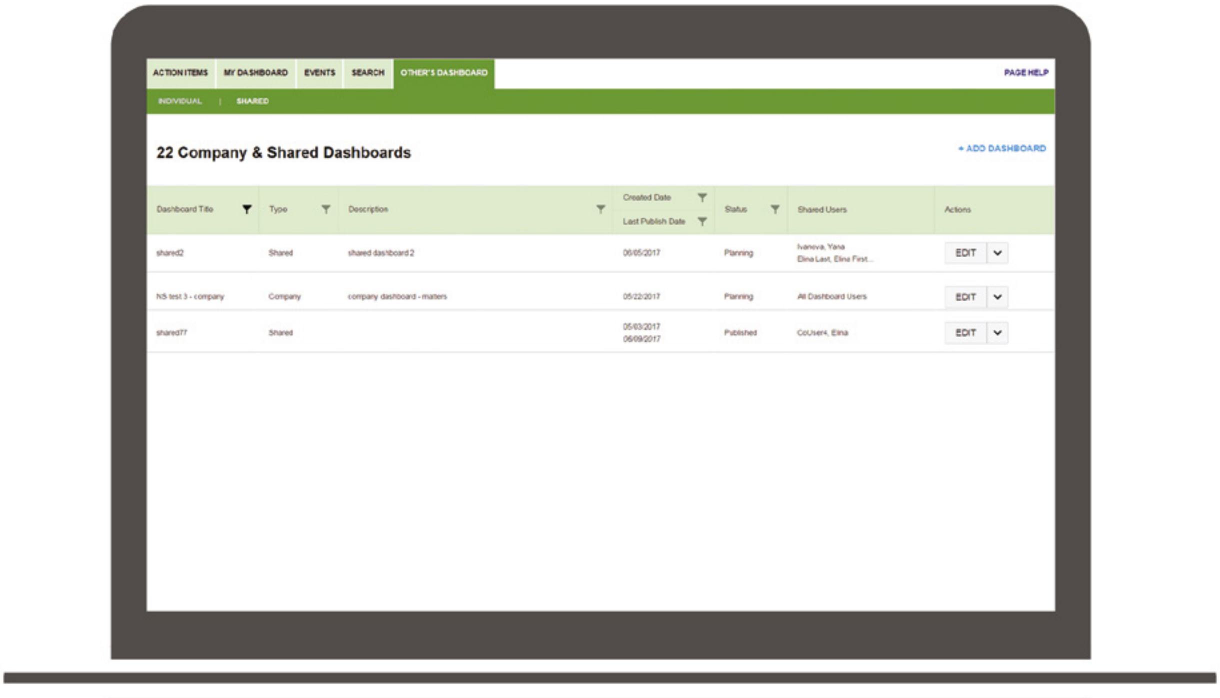
The various improvements to reporting allow companies and law firms to run reports on invoice posted by and comments to law firms. The additional fields and filters provide better matter and invoice reports. Enhancements to the sharing functionality allow users to easily share reports with multiple users and look at the sharing history.

Customisation

The expansion of the customer fields introduced 10 drop downs, 30 currency and 10 date customer fields.

Company and Shared Dashboards

These feature enhancements allow Tracker users to easily share reports with multiple users, and to see who they've shared reports with.



User Experience

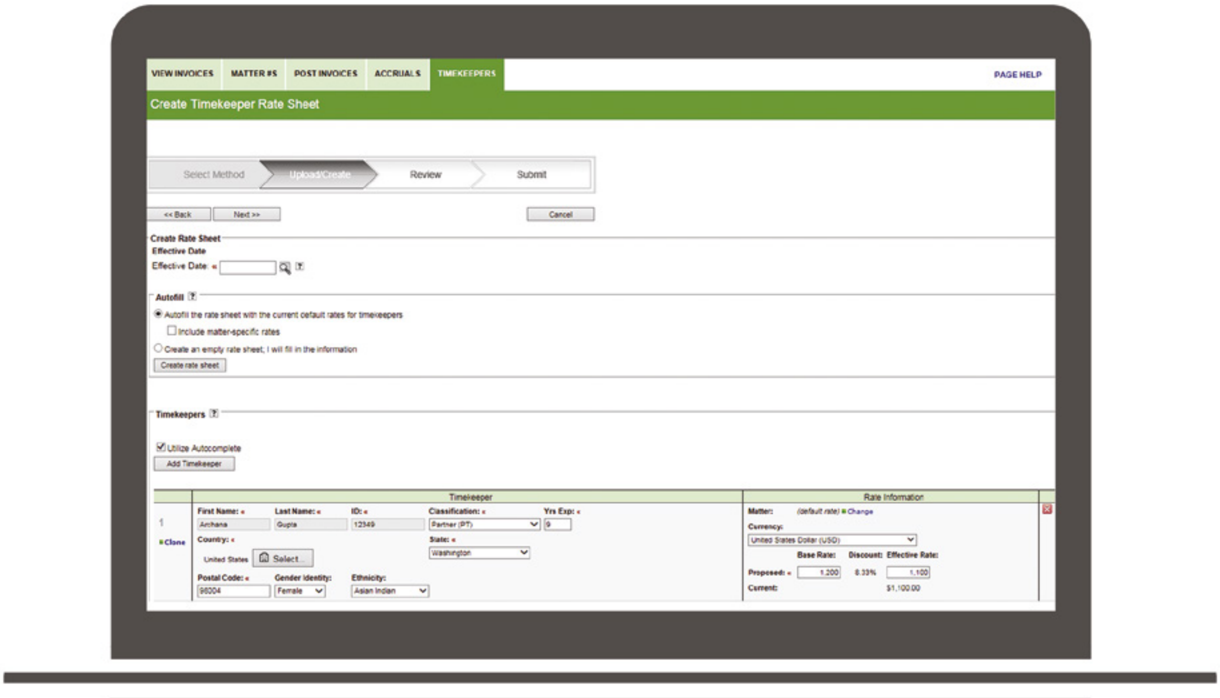
Timekeeper Rate Review

The enhancements to the timekeeper review process allows for new approval routes and reviewer options, along with improvements to the overall timekeeper review user experience. For companies to effectively process timekeeper rate sheet uploads, changes were made to the Timekeeper Rate Sheet Upload specification in Legal Tracker.

- Easier-to-use interface offers more configurability
- New bulk approval options offer more power and accessibility
- New approval routes and review options

Line item narrative tool (keyword highlighting)

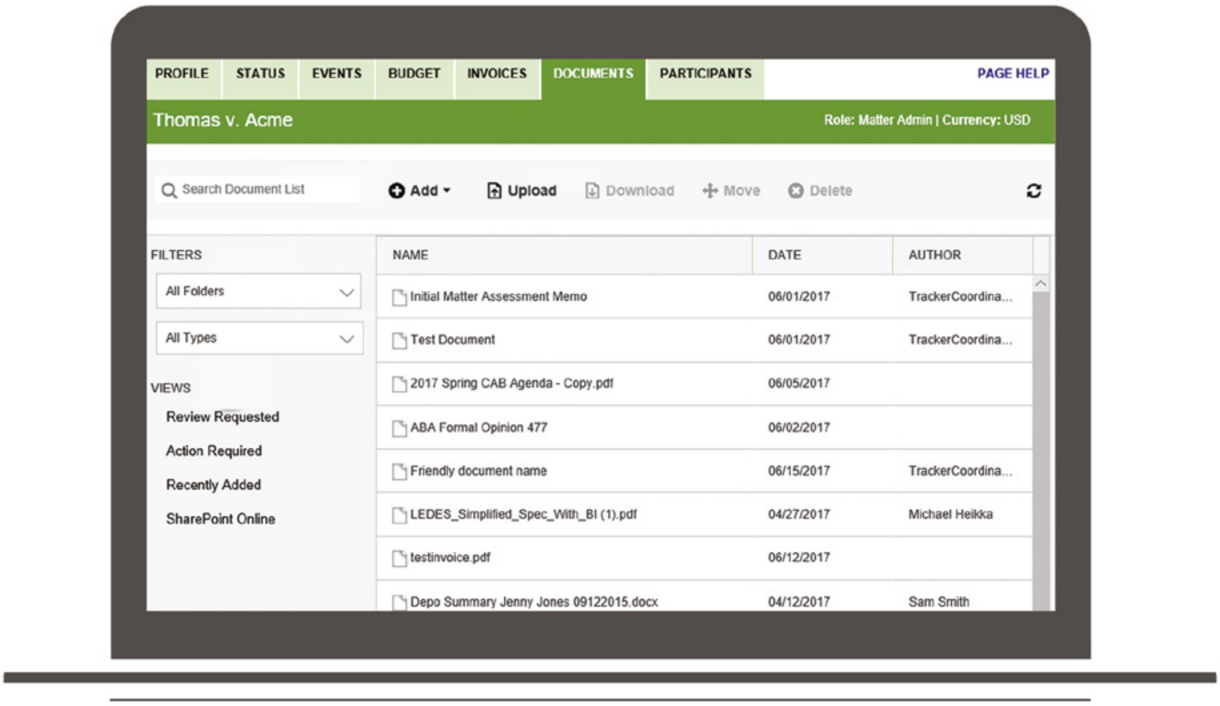
Let's companies associate keywords with fee and expense line item adjustment reasons, see those keywords highlighted when reviewing line item narratives, and determine what adjustments might apply based on the keywords surfaced in the narrative.



Refreshed matter-level document management experience

The new matter-level document management experience enhanced core functionality within Legal Tracker. The enhanced experience introduced:

- A modern document list toolbar, allowing users to search for documents within a matter, and add, upload, download, and delete documents.
- A navigation panel, with filters and 1-click views, allowing the user to see all documents for a matter when the matter's doc list is open, regardless of folder or document type.
- A split view, expandable document details panel to support in- context editing and document-level actions, like downloading, saving related files, creating dates and events, changing to a different doc type, moving and deleting, and more.

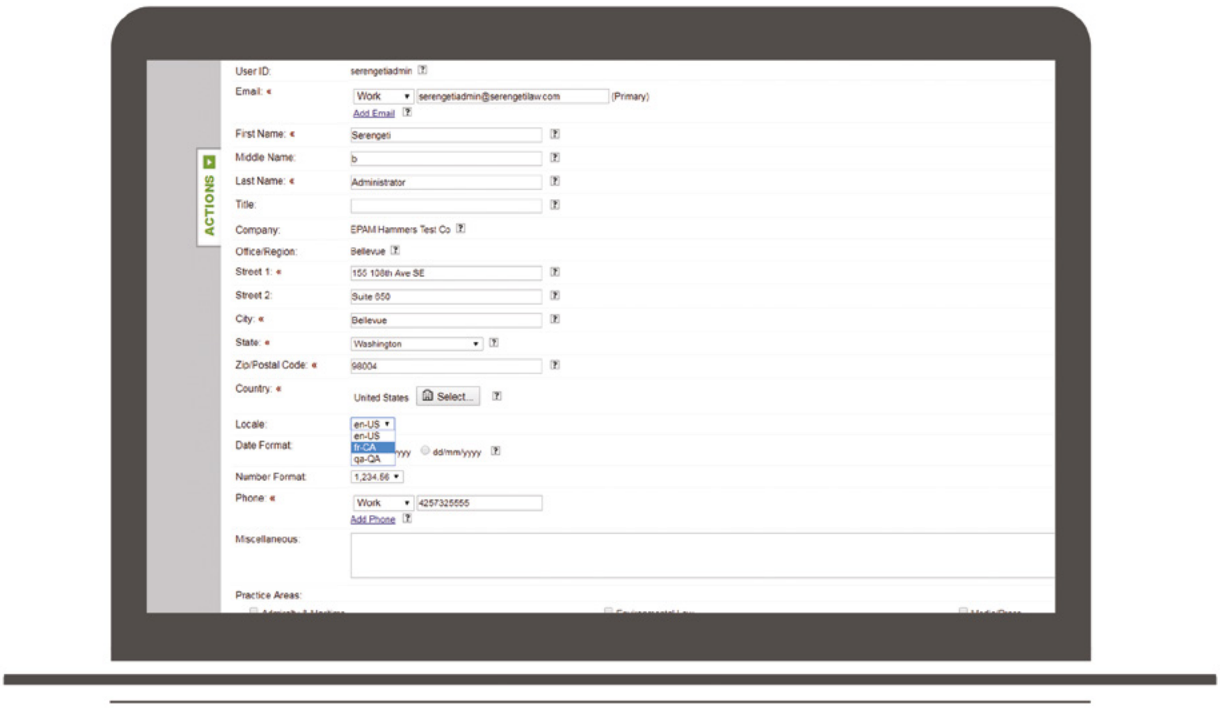


Tax spending exclusions added to tax configuration

The change to the Tax configuration setup allows you to include a Spending Amount Exclusions option to exclude tax types from the matter profile total spend. The inclusion of the see details link by the Total Spending field displays more information about excluded spend.

Multi-language Support

Legal Tracker now supports multiple languages. You can enable a new language through a Language Pack Subscription added to their Legal Tracker account. Law firms have access to all available Language Packs for no additional charge.

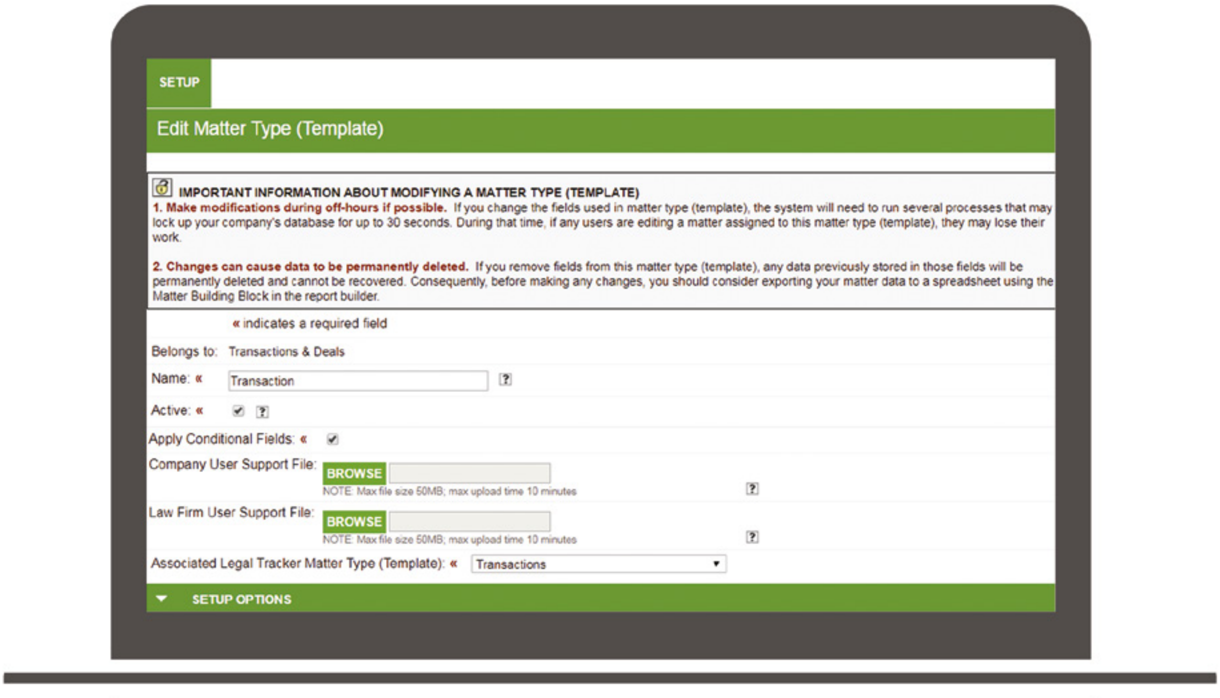


Innovation and integration

Smart Matter Creation

A powerful yet easy-to-use feature to streamline the matter creation process, reduce the potential for errors, and eliminate disparate financial spreadsheets.

- Automates the content of user-selectable fields based on a pre-defined set of rules
- Rules can be easily created, modified, or re-ordered by company administrators, without programming knowledge
- Automates the cost center of a matter based on the practice group
- Automates the invoice approval route based on the lead in-house counsel assigned to the matter
- Displays custom fields based on a previously selected value in the matter details



Accounting Codes

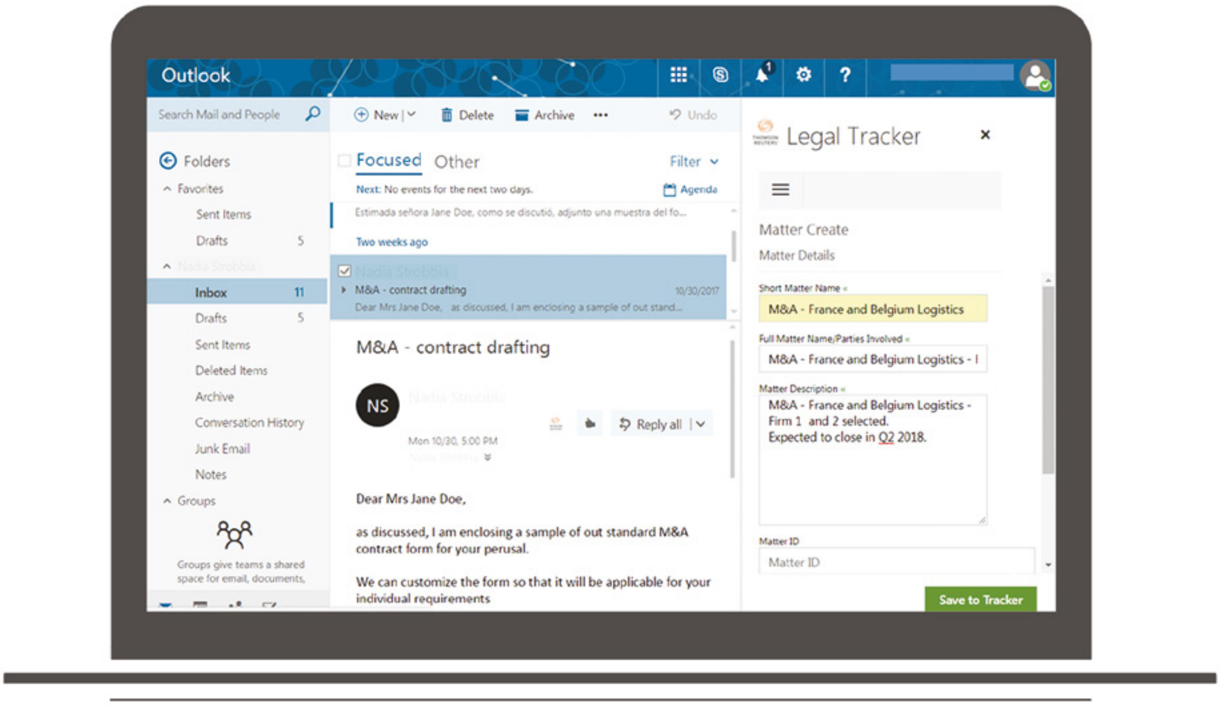
The improvements to the Accounting Code Integration make it possible to present type-ahead menu choices for your accounting codes and enter these codes and descriptions yourself, as part of Accounting Codes Setup.

SharePoint integration for matter documents

Upload files from SharePoint Online directly to matters in Tracker, and move matter documents from Tracker to SharePoint Online. Then collaborate with outside counsel using Tracker-managed copies, or with internal users through Tracker links. Firm users won't need to access your SharePoint Online folders. This functionality is compatible with the Azure Active Directory integration, but integration is not required.

Tracker for Outlook add-in

Users can create new matters from within Outlook, in seconds, based on an Outlook add-in matter template using the new Matter Create feature. In addition, My Matters allows you to open a matter card and see high-level matter details, or to clone existing matters within your Outlook.



Currency Management

It's now possible to use your own, company supplied exchange rates in place of Tracker's built-in rates.

What's new?

Q1

Smart Matter Creation
Streamlines and automates the matter input process.

Enhanced Timekeeper Rate Review
Improved user experience, new approval routes, and more reviewer options.

2017

Accounting Code Integration
New input methods to appeal to all users' needs while improving productivity.

Improved Help Tool
Updated user experience helps you find the answers you need.

Q2

Timekeeper rate review assignment routing
Companies can create rules for routing timekeeper rate sheets to any Tracker user or group of users for review.

Additional dashboard features
Company System Administrators now have a centralised dashboard management experience for creating and sharing dashboards across multiple users, and standardising dashboard views so that users in the same role see the same information.

New language support
Clients can enable a new language through a Language Pack Subscription added to their Legal Tracker account.

New matter-level document management experience
The new look is an improved experience that enhances core functionality.

SharePoint integration for matter documents
Upload files from SharePoint Online directly to matters in Tracker, and move matter documents from Tracker to SharePoint Online.

New rate sheet submission requirements for law firms
For companies to effectively process timekeeper rate sheet uploads, changes were made to the Timekeeper Rate Sheet Upload specification.

Tax spending exclusions added to tax configuration
Tax configuration setup now includes a Spending Amount Exclusions option to exclude tax types from the matter profile total spend.

Reporting
Company and firm users can now report on Invoice Posted By and Comments to Firm.

Q4

Dashboard Updates
Two new chart types, an option to show only active filters, the addition of names to dashboard sub-tabs, and the ability to move matter action items above charts.

Invoice Currencies Allowed
Manage the currencies that firms can select when they submit invoices for matters.

Invoice Formats Allowed
Restrict what invoice formats companies will accept from firms.

Line Item Narrative Tool
Associate keywords with fee and expense line item adjustment reasons, see those keywords highlighted when reviewing line item narratives, and determine what adjustments might apply based on the keywords surfaced in the narrative.

Matter Create for Outlook Add-in
Create new matters right from within Microsoft Outlook in a matter of seconds.

User Preferences for Outlook Add-in
Users of the add-in can now set personal preferences for number formats and date formats and select from four supported languages.

More Reporting Fields and Filters
Additional fields and filters for matter and invoice reports and the ability to filter reports on dates that are not blank.

2018 / 2017

Editable Names for Report Scheduler
For users who select the SFTP delivery method for schedule reports, there is now an option to provide a user-defined report name.

Shared Reports Enhancements
Easily share reports with multiple users and see who they've shared reports with as well.

Multi-language Support
Support for new languages is now available for an additional annual fee.

Additional Custom Fields
For companies who need to capture additional matter details unique to their case management and e-billing practices, we've added 50 additional custom fields.

What's next?

Data warehouse reporting
Custom reporting, visualization and analysis using industry standard tools and applications.

International analytics
Provide index data across select regions and countries.

Contract management
Templates with reportable data and basic approval routing (no revision tracking).

User interface refresh
Multi-phase update to refresh the user experience and workflow.

Accrual enhancements
Bulk upload firm accruals, disable the auto-approval of accruals when a company system administrator adds or adjusts and unbilled amount.

Speedy pay discount
Company specified time based discount at the firm level.

Tax enhancements
Multi-phase update to the international tax capabilities including the support of additional tax types, identification of tax point or time of supply and rejection of invoice submittals containing "other" tax at firm office.

Legal Hold
Integration with cloud-based technology partners (Exterro) and Total Discovery.

AP route test configuration
Generate and auto-populate a test AP batch with user-defined test data.

Company user automation
Add/update/inactivate CoUsers via a data feed or file.

AFA enhancements
Multi-phase update to fixed/flat fee, capped fee, volume discount-trigger collection of matter spend and provide a predetermined discount rate based on the monetary total (including tier rates) of selected matters within a portfolio.

2018

Please note, all 2018 enhancements are subject to change.