



# LEGAL TRACKER PROFESSIONAL SERVICES OFFERINGS

As part of our ongoing effort to provide our customers with world-class support and service, we offer a variety of ways to help ensure you're getting the most out of Thomson Reuters Legal Tracker™ (formerly Serengeti Tracker™). From optimization, to technical solutions, to training, our Legal Tracker Professional Services Team of seasoned lawyers and advisors are ready to help you boost your efficiency and effectiveness and maximize your investment in Tracker.

## SYSTEM OPTIMIZATION

**Legal Department Operation (LDO) Analysis:** An onsite offering designed to target areas where clients can optimize the use of Thomson Reuters Legal Tracker. LDO Analysis consists of onsite conferences, training sessions, and project management planning to help align client's department more closely with the industry's best practices. At the end of the LDO Analysis, we deliver an executive summary and Tracker Optimization Plan outlining specific steps client's legal department should take to optimize Tracker use.

**Tracker Optimization:** We offer onsite support to help in executing client's legal operations initiatives related to Tracker or the Tracker Optimization Plan from an LDO Analysis, facilitate interdepartmental conversations, and manage the process.

**E-billing Rollout:** We provide subject matter expertise, project management, system configuration, training, and customized firm notifications to on-board your other legal operations to Tracker. We support clients who need to on-board international operations to Tracker. We also offer post-rollout support as an add-on for clients requiring extended consultant support.

**Report Building Service:** For departments that lack a report-writing expert or are simply short on hands, we offer a Report Building Service that leverages the Tracker Report Builder. Note that this service does not include custom outputs or Microsoft® Excel® spreadsheet manipulation.

## TECHNICAL SOLUTIONS

**Reports Generator:** For departments that require additional reporting capabilities beyond the Report Builder, we build custom reports, consolidate reports into a single report, and customize formats based on budget and accrual data in Tracker. We deliver a visual program that produces custom reports in Excel and PowerPoint® formatted to your department's design requirements.

**Reports API:** Use the report API to pull real-time reports from Tracker and send to a desired location.

**Accounts Payable (AP) Integration:** We offer a range of solutions for automating/streamlining the transfer of invoice information to and from your AP department. The result is a routine that automatically detects a new batch file, transforms the information to meet AP application import requirements, and delivers the transformed file to AP.

## CONSISTENTLY RATED NUMBER ONE

Legal Tracker (formerly Serengeti Tracker) is the world's leading legal matter management, e-billing, and legal analytics system designed for corporate legal departments and law firms. Part of the Thomson Reuters Legal business unit, Legal Tracker is consistently ranked as the top-rated solution for its ease of use, international features, and quick implementation.

**Matter Integration:** We have the ability to automate the import of matter data into Tracker. This allows for you to continue leveraging the great features of IP or claims systems while gaining the benefit of Tracker's e-billing capability.

**Database Split:** We offer splitting of database when clients have divestiture or organizational restructuring that would require a separation of matters and users. This offering comes with post-split onsite training to assist the new company with configuration and legal operation workflows.

**Database Merge:** We offer merging databases of two clients if they would like to consolidate matters and users into a single database due to acquisition or merger.

**Data Conversion:** For clients who have the need to migrate matters, invoices, statuses, events, and documents from their current system, we offer assistance in transforming and loading the data into Tracker.

**Matter Archiving:** We have the ability to periodically remove matters from a client's database to meet the client's corporate retention policy and compliance regulations.

**Database Cleaning:** We have the ability to do one-time removal of archaic values choices from custom list fields, organizational units, practice groups, AP routes, and invoice approval routes, provided that they are not associated with any matters, open or closed.

### TRAINING

**Tracker Boot Camp:** A three-day intensive training at a Thomson Reuters facility on all things Tracker. The class is limited to a small number of individuals and is designed to be interactive and conversation-driven. Quick-reference guides and other supplemental documents are provided.

**Optimization Clinic:** A hosted clinic which provides an interactive forum for users to share Tracker experiences, help each other problem-solve, and collaborate to improve overall system health at each company.

**Custom Training:** We offer a wide array of Tracker training sessions that can be conducted onsite. We will deliver standard, in-depth agendas for each topic the client would like covered. Topics related to Tracker may include reporting, matter creation, invoice approval, matter management, and budget and accrual.

### CONSULTING

**Consultation:** We have subject matter experts in legal department operation, workflow design, vendor management, executive reporting, billing guidelines creation, matter management, and system integration. For clients who wish to consult an expert for initiatives related to Tracker, our consultants can offer best practices.

**Tracker Coordinator Service:** With this service, clients receive an experienced remote Tracker coordinator who knows Tracker functionalities and can advise a client's legal department on how to improve operations. The Tracker coordinator will dedicate 10 hours a week to support the client in addition to making one quarterly visit to the client's office.

To learn more, please contact your representative at **1-888-736-9587** or visit **[legaltracker.com](http://legaltracker.com)**.

