

THOMSON REUTERS LEGAL TRACKER DATA CONVERSION OVERVIEW

Maximize reporting capabilities by loading legacy matter and spend data into Tracker with a data conversion.

WHAT IS DATA CONVERSION?

Thomson Reuters Legal Tracker™ (formerly Serengeti Tracker™) Professional Services can manage migration of historical data from your legacy system into Tracker. Our expert consultants will work with you to understand how your data is currently used, identify data gaps, and eliminate duplications. Next, we will analyze, map, and test your data to ensure its compatibility with Tracker and that the data meets your expectations. The result will be that all of your historical data will be in Tracker and reportable without taxing your department's limited resources. We have successfully completed complex data conversions for many of our largest clients, as well as for small legal departments. Let us use that expertise to help you.

BENEFITS OF A LEGAL TRACKER DATA CONVERSION

Having your legacy matter and spend data in Legal Tracker can provide the following benefits:

- Ability to report historical matter information along with new matters in Tracker
- Maintain compliance with your electronic storage and document retention policies
- Users can better familiarize themselves with Tracker while seeing the information that they are accustomed to already in the legacy application
- Historical and year-over-year reporting is available in Tracker immediately, especially if your department has just started using Tracker

While no two data conversions are exactly the same, after 100+ successful data conversions, we have honed an effective process.

In order to prepare your data and load it into Tracker, there is a tested and reliable method for data conversions. During the process, we consult with you to find out how

you use your existing data, and then we help make it consistent, identify gaps, eliminate duplication, and prepare your data for Tracker. Once that's complete, we test your data to ensure compatibility and compliance with Tracker requirements before we load it. The end result is a Tracker database with all of your desired historical records organized in a clean and efficient manner, ready for your department to use.

IS A LEGAL TRACKER DATA CONVERSION RIGHT FOR YOUR LEGAL DEPARTMENT?

- Do you have limited resources to move and manipulate data between two systems?
- Does your department need to have all of your legal records and documents stored in the same system?
- Would you like to have historical reporting available to your department when you are set up in Tracker?
- Would you like your department to have Legal Tracker Analytics available for use when you are set up in Tracker?

If you answered "Yes" to any of the above questions, then a data conversion may make sense for your legal department. For a price estimate, please complete the following questionnaire and return it to your Legal Tracker sales specialist.

PARTNERS FOR SUCCESS

Legal Tracker Professional Services is a team of seasoned lawyers, IT, and financial professionals who possess intricate Tracker product knowledge and a core understanding of the specific challenges that legal departments face. Each consultant brings unique skill sets that range from expertise in general legal technology and legal department operations to product management expertise, technical skills and capabilities, and years of training and educational experience. Most importantly, the team is practiced in the art of listening and translating your department's needs into realistic and tangible solutions suited to your department's use of Tracker.

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.



DATA CONVERSION QUESTIONNAIRE

Please complete this questionnaire so that Legal Tracker Data Services can provide a quote for your data conversion project. If you have any questions, please contact your Legal Tracker sales specialist.

What system is the data in now? (if multiple systems, please name all)

Do you have the ability to get all of your data out of that system? _____

Would you be able to get the data out of that system multiple times? _____

If you do, what format will the data be in (SQL, Oracle®, Access®, Excel®, .csv, etc.)? _____

If you cannot access your data, you will have to either get it from your current vendor or use the reporting tools you have to generate the data.

How much data do you have?

Total number of matters to be converted: _____

Open/active matters: _____

Closed/inactive matters: _____

Total number of invoices to be converted: _____

Total # of documents to be converted: _____

Total # of calendar dates/events to be converted: _____

Total # of status reports/notes to be converted: _____

Please note that we strongly recommend that you provide the Legal Tracker Data Services Team a copy of your database in order to accurately scope your data conversion project. In the absence of a database copy, we will rely on your responses in this questionnaire to determine the scope and pricing of your data conversion project. If the actual data you provide during your implementation is significantly different from your responses above, a change order may be needed for any additional services above and beyond the initial conversion scope.

Return this questionnaire to your Legal Tracker sales specialist for a price estimate.

To learn more, please contact your representative at
1-888-736-9587 or visit legaltracker.com.