KEY FEATURES OF THOMSON REUTERS LEGAL TRACKER

Thomson Reuters Legal Tracker™ organizes your legal department's key information in a secure, online workspace that you share across your team and 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.

ALTERNATIVE FEE ARRANGEMENTS (AFAs)	• Create, assign, manage, audit, and report on an array of different alternative fee structures at the matter level • Manage multiple fee arrangements for multiple firms on the same matter or exclude certain matters from an AFA • Select strict or flexible cost controls or "collars" for AFA matters and automate early expenditure warning emails • Group multiple matters into a single Firm Profile with an overall spend limit, an efficient way to handle large bodies of work for a single fixed fee • Combine AFAs and volume discounts to achieve greater savings while rewarding firms with additional business • Utilize task codes within AFAs to define cost-per-unit limits on common legal services
INVOICE AUDITING	• Automatically or manually enforce timekeeper rates, expense compliance, and other billing guidelines
APPROVAL ROUTING	• Auto-route to preset approvers; add reviewers ad hoc
OVER-BUDGET SPENDING ALERTS	• Assign an Invoice Rejector role with the ability to pull back invoices, even if they are in another reviewer's queue, including rejecting back to the firm • For month, fiscal year, life of matter, or phase • Automatically deploy early expenditure limit warning emails on AFA matters
CURRENCY CONVERSION AND TAX	• Amounts displayed in your preferred currency • Foreign and domestic taxes tracked separately • Support for value added taxes (VAT, GST) • Set restrictions on currencies in which your firms may submit invoices to reduce exchange rate exposure • Support for LEDES XML 2.1 which offers more comprehensive tax support and the ability to capture all data elements required by foreign jurisdictions
INVOICE DATA TRANSFER TO AP	• Configurable fields for extract to accounts payable • Web Services-enabled for automatic data transfer • Available Accounting Codes Integration eliminates human error and ensures your accounting codes are always current
TASK CODE ALERTS	• Create and set budgets based on UTBMS task codes and custom task code sets

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MATTER AND IP MANAGEMENT Track just the information you need, collected at the source and organized for quick retrieval.	DASHBOARD	• Visualize your data in powerful and actionable ways • Compare your legal team's performance to Tracker index averages • Quickly build professional charts and graphs from a large dashboard template library • Easily share access to dashboard elements among your team
	CUSTOMIZABLE TEMPLATES	• Customize information tracked for different types of legal projects • FAS 5 loss contingency tracking • IP-specific fields for filing dates, inventors, status, etc. • Quickly inject Tracker data into your templates with the available Document Automation tool
	SMART MATTER CREATION	• Streamline your matter creation process with configurable rules capable of automatically adding, filling in, or limiting user-selected fields within specific templates
	ENFORCEMENT OF REQUIREMENTS	• Notification to firm that bill will not be processed until required budget, status update, etc., is provided
	STATUS REPORTING	• Optional or required – captures key developments from outside counsel on a monthly or quarterly basis
	RESULTS	• Track matter outcome, duration, predictive accuracy, and lessons learned
	EVALUATIONS	• Evaluate and compare performance of outside counsel • Compare rates paid to Tracker index averages and filter by geography, substitutive law, and more
CONTRACT AND DOCUMENT MANAGEMENT Manage all of your documents and contracts online with one collaborative system.	MODERN DOCUMENT MANAGEMENT	• Centralize documents, files, and emails directly from the desktop or network into Legal Tracker, where it can be easily associated, searched, and stored • Quickly upload or sort documents with modern drag-and-drop and multi-select controls and find items fast with enhanced search and filtering
	KEY INFORMATION ABOUT CONTRACTS	• Store drafts, notices, correspondence, and amendments • Collect data about parties, terms, renewals, etc. • Utilize custom fields to store key contract elements tailored to your business—and report on results
	DATES AND EVENTS NOTIFICATION	• Set notifications for key dates and events, such as renewals and deadlines • Manage tasks and action items
BUDGETING AND ACCRUALS Use budgeting and unbilled time reporting to capture spending estimates directly from your firms.	LAW FIRM BUDGETS	• If required budget is overdue, firm's bills are held • Automatic spending-to-budget comparisons
	PHASED OR FISCAL YEAR	• Budget by time period or litigation/IP phase • Define complex phased budgets and track spend-to-budget for those matters • Accurately budget an track matters with alternative fee arrangements
	DEPARTMENTAL BUDGET	• Roll up project budgets and spending into internal budget • Quick reforecasting for unanticipated events
	ACCRUALS FOR UNBILLED TIME	• Firms input unbilled time and estimated spending

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REPORTING AND TRENDING Produce reports that analyze budgets and spending, summarize key information, and identify developing trends.	REPORT GENERATOR	• Hundreds of reports with easy-to-use filters • One-click drill-down reporting for additional detail • Trend analysis showing changes over time
	REPORT SCHEDULER	• Automated reporting that runs and emails reports to users as scheduled
	CUSTOM EXPORTS	• Fully customizable exports for presentations, graphs, and so on
	MY REPORTS	• Save criteria for quick generation of periodic reports
LEGAL ANALYTICS Configurable individual and peer benchmarking tool with real-rate data.	RATE EVALUATOR	• Compare and contrast the true impact of proposed rates before entering negotiations with your firms
	ANALYTICS	• Reveal how client relationships have evolved and expose areas that need attention • Leverage current market rate trends based on real—not stale—statistics • View markdowns by area of law or matter type compared to industry benchmarks • Analyze your department's and law firm's performance against industry benchmarks using report cards
	TIMEKEEPER RATE REVIEW	• Easily review, adjust, and approve the proposed billing rates from a law firm on one page, including historical data • Enforce limits on how often your firms may propose rate increases
SERVICE OF PROCESS Automatically retrieve and route S.O.P. documents and information directly into your matters.	AUTOMATED DOWNLOAD	• If you have CSC or CT Corp. as your registered agent, you can have them delivered directly to Tracker
	INTAKE	• Automatic routing to existing matter or delivery to new matter
	AUTO-ASSIGNMENT AND CALENDARING	• Assign documents to responsible user, including deadline alerts
INTERNAL TIME ALLOCATION Capture internal legal costs to assess department performance.	QUICK CAPTURE	• Input time by hour or percentage of week
	REPORTING	• Compare outside versus internal cost; allocate to business units
INTEGRATIONS Extend the Legal Tracker experience into the apps your legal department relies on every day.	TRACKER FOR OUTLOOK® ADD-IN	• Quickly generate matters and instantly review, dispute, or approve invoices directly from your Outlook reading pane • Add documents and e-mails directly to Tracker matters from Outlook • Create matters from Outlook
	SHAREPOINT® ONLINE	• Perform common document management workflows, such as copying a document from Legal Tracker into SharePoint or importing a SharePoint document into a Legal Tracker matter
	LEGAL HOLD*	• Create an associated legal hold matter inside the Tracker matter creation workflow • Gain insights on associated holds from the matter-level Legal Holds tab in Tracker • Link or unlink legal hold matters between systems

* Integration available with select Thomson Reuters software partners. Contact your Legal Tracker sales consultant for details.

INTERNATIONAL

Work across your enterprise—in any country in the world.

LANGUAGE PACKS	• Localize the Legal Tracker experience with language packs, containing translations for most non-configurable elements of the Tracker interface
CURRENCY AND FORMATTING	• Support for 160 currencies and user-personalized currency and number formats • Use your own company supplied exchange rates in place of built-in rates in Tracker
DATA RESIDENCY	• During implementation, select where you want to store your Tracker data—in the US, UK, or Canada

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

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