



WHAT ARE THE MAIN FEATURES OF THOMSON REUTERS LEGAL TRACKER?

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

MATTER AND IP MANAGEMENT

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

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

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

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

REPORTING AND TRENDING

Produce reports that analyse budgets and spending, summarise key information, and identify developing trends.

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

LEGAL ANALYTICS

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

RATE EVALUATOR	<ul style="list-style-type: none"> • Compare and contrast the true impact of proposed rates before entering negotiations with your firms
ANALYTICS	<ul style="list-style-type: none"> • 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 • Analyse your department's and law firm's performance against industry benchmarks using report cards
TIMEKEEPER RATE REVIEW	<ul style="list-style-type: none"> • Easily review, adjust, and approve the proposed billing rates from a law firm on one page, including historical data

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

INTERNAL TIME ALLOCATION

Capture internal legal costs to assess department performance.

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

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