SERENGETI TRACKER®

GETTING STARTED GUIDE

FOR LAW FIRMS & VENDORS

Welcome to Serengeti Tracker! Tracker is a web-based electronic invoicing and matter management system that corporate law departments share with their outside counsel and vendors. Because it is a shared system, Tracker simplifies the collection and organization of electronic bills, budgets, status reports, calendar items, contracts, and documents.

Because Serengeti Tracker has an intuitive design, many administrators are able to set up their firm without any instructions. Nevertheless, you may find this document helpful as you begin the process. Below is a list of topics that are covered in this Getting Started Guide. If you have a question that is not answered in this document, please see the "Additional Help & Support Resources" section at the end.

As you begin the process of setting up your firm on Serengeti Tracker, know that the system was designed by former private practice attorneys and administrators who are sensitive to the challenges facing firms and their billing departments. Below are just some of the ways Serengeti Tracker addresses key concerns and offers a superior system:

- ***Serengeti Tracker is FREE for all law firms & vendors.*** Other systems charge your firm an annual fee per client or as much as 2% of your billings.
- You can post invoices in any format (e.g. LEDES 1998B, Microsoft Word, Adobe PDF, text file, etc.).
- If you post LEDES-formatted invoices, Tracker does not require Task & Activity codes on fees.
- Because the system is web-based, you do not need to install or maintain any special software.
- Law firm users have easy access to the status of invoice approval on Serengeti Tracker. A law firm user can easily determine if his or her invoice has been approved for payment, or whether there is a delay in the approval process.
- Serengeti Tracker enables corporate law departments to more quickly approve and pay your invoices.

For more information and RFP resources to help your other clients select an e-billing and matter management system visit: www.serengetilaw.com/Firms/EvaluatingSystems.htm

NOTE: SERENGETI E-BILLING CERTIFICATION PROGRAM

In response to requests from law firms who are being asked if their firm is e-billing enabled, Serengeti Law created the *Serengeti E-billing Certification Program*. This certification allows your firm to promote your ability to generate and submit invoices electronically.

Once your firm submits its first invoice in Serengeti Tracker, your firm will qualify for the certification. For more information about the program and instructions on how to display your certification visit www.SerengetiLaw.com/certification.

Minimum Software & Hardware Requirements

Serengeti Tracker does not have any requirements for hardware. Below are the software requirements to be able to access the system:

- Microsoft Windows™ operating system (NT, 95, 98, 2000, ME, or XP are all supported – *Macintosh, Unix, and Linux operating systems are not supported*)
- Microsoft Internet Explorer™ web browser version 6.0 or higher

Note about Electronic Invoices: The electronic invoice format requirements are detailed in a separate document entitled “Electronic Invoice Format Requirements & Posting Instructions”. See the "Additional Help & Other Resources" section for more information.

Setup Step 1:
Complete Setup of Firm Profile & First Office Profile

When you login to Serengeti Tracker for the first time, you will be guided through the setup of the firm profile, the first office profile, and your user account (this is called the firm and user activation process). If you have questions about how to complete any field, remember to click on the field-specific help link to the right of the field. In addition, the following background information will be helpful as you complete the activation process.

Relationship of the Firm Profile to Office Profiles

Figure 1 on the next page shows the relationship of the firm profile to the office and user profile(s) of a firm. As illustrated in Figure 1, each firm has a firm profile that contains information applicable to the entire firm. For example, fields in the firm profile include the complete firm name, a firm short name that is displayed in most pages in Serengeti Tracker, the firm history, and the firm's Lead System Administrator and Backup System Administrator (see below for more information about the Lead and Backup System Administrators).

In addition, there is at least one office for every firm. Even solo practitioners will always have both a firm profile and one office profile. The office profile contains information specific to the office of the firm, such as the office address and billing address, areas of expertise of attorneys in the office, and the Office System Administrator and Backup Office System Administrator Coordinator (see the next paragraph for more information about Office System Administrators).

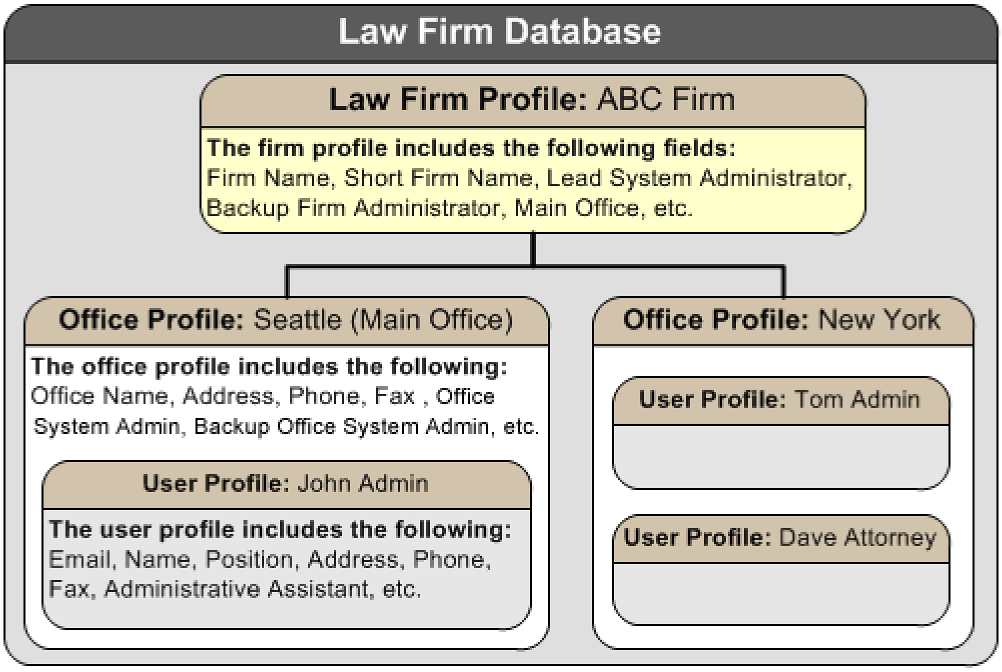


Figure 1

Selection of the Lead System Administrator of Office System Administrators

Your firm's Lead System Administrator and the Backup System Administrator are specified in the firm profile, and these users are responsible for your firm's overall use of Serengeti Tracker. In addition, each office profile contains a designation of an Office System Administrator and a Backup Office System Administrator. The Office Administrators are responsible for an office's use of the system, and may be the same users as the Lead System Administrator. **Figure 2** on the next page shows the relationship of Lead System Administrators and Office System Administrators:

Selection of these Administrators is a critical task in the proper setup of your firm. In general, these users should be individuals in your firm's IT department or billing department. Generally, it is NOT appropriate to choose a secretary or an attorney in your firm (although such a statement may not apply to very small firms or solo practitioners). Please remember to click the field-specific help link to the right of the applicable field for more information about who you should select, and the responsibilities of these Administrators.

Below are several other critical notes about these Administrators:

- **There is no such thing as a firm administrator for a specific client!**
  Many firm users have the mistaken impression that there is a specific firm administrator for each client. In fact, once a user is created as an administrator, that user is an administrator for your firm for ALL clients on Serengeti Tracker. Thus, firms need to make careful and appropriate judgments about which users should be firm administrators in Serengeti Tracker.

- **Only the Lead System Administrators and Backup System Administrator can change the Lead and Backup System Administrators.** Other firm administrators and company system administrators cannot change the Lead and Backup System Administrators. Occasionally, your firm will have been setup with the wrong Lead and Backup System Administrators. See the help topic about changing your Lead and Backup System Administrators for more information.

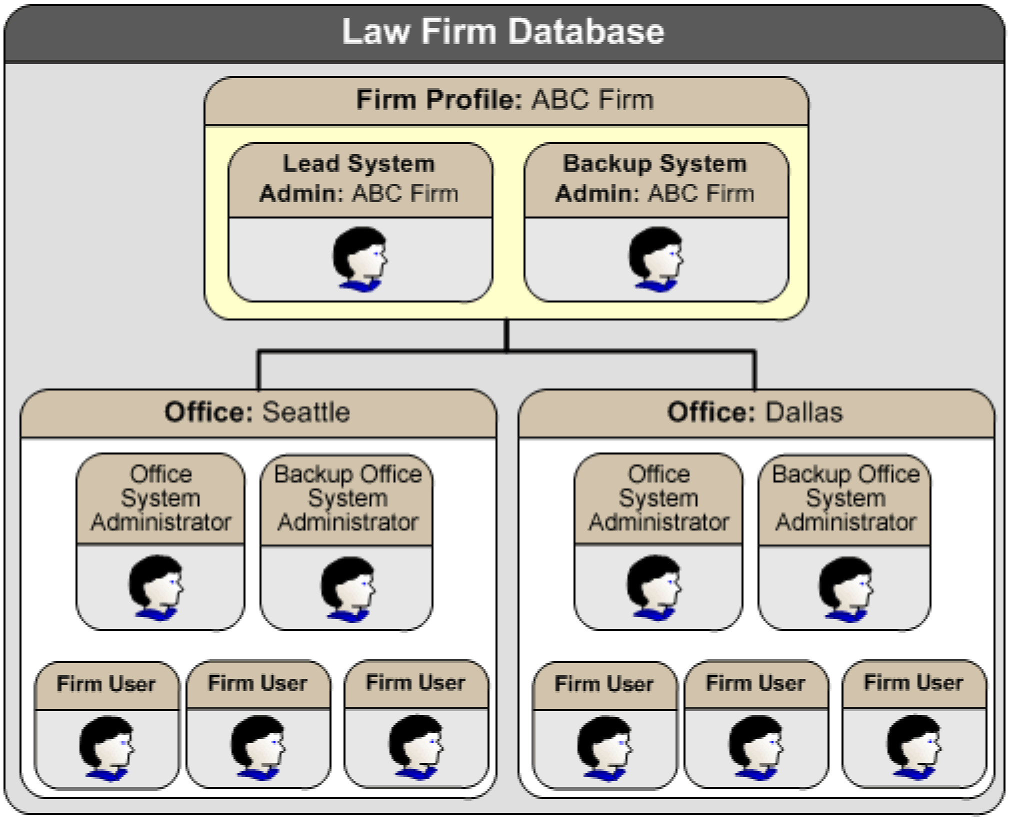


Figure 2

Setup Step 2:
Complete Setup of Any Additional Offices

If your firm has users from more than one office that will be working with your client on Serengeti Tracker, you should create the additional offices by following the instructions below. If your firm has only one office or only one office will be working with your client, you can skip this Setup Step 2.

1. Click on the **Users/Firm** button at the top of the page.
2. Click on the **Offices** tab.
3. Click **Add Office** on the left under "What You Can Do."
4. Fill out the Office Profile form. Remember that the user designated as the Office System Administrator will be shown at the bottom of all pages in Tracker as a support contact for any user associated with that office. (See Setup Step 1 above for a more information about the relationship of the Lead System Administrator to an Office System Administrator.)
5. Click **Save & Close** on the left under "What You Can Do."

Follow the 2-5 above to add any other additional offices.

Setup Step 3:
Specify User Password Requirements in the System

At some firms, the IT department has specified minimum password requirements for any system used by the firm (such as logging into your firm's network). An example would be that all passwords must be at least seven characters long, with at least one character being capitalized and one character being a number. The default in Serengeti Tracker is a minimum length of seven characters, but there are no capitalization or number requirements. If you would like to change the password requirements for you firm's users, follow the instructions below:

1. Click on the **System Setup** link below the "Logout" and "Help" buttons in the upper right corner of the screen.
2. Click the **Miscellaneous Options** link.
3. Complete the password settings. (The settings are designed to give you complete flexibility in creating complex password requirements, but may initially seem confusing -- please click on the field specific help link to receive detailed instructions about any of the fields.)
4. Click **Save & Close** on the left under "What You Can Do."

> **NOTE: Your firm's password requirements can be viewed by company system administrators.** Many companies have password security policies that they want to apply to all users who can access the company's database (i.e. both company users and firm users). Although company system administrators cannot edit your firm's password security policies, they are allowed to view your firm's password requirements to make sure that they comply with the company's minimum requirements.

Setup Step 4:
Create Users (and information about user training)

ALL of the following types of users need to be created for the proper setup of the system:

- The client-responsible partner for your client
- Lead attorneys responsible for each matter for your client
- Legal assistants for the lead attorneys working on your client's matters
- Other attorneys or paralegals actively involved in your client's matters
- Billing manager/clerk(s) responsible for generating your law firm's invoices.

> **NOTE: Creating users is a critical task in the setup of the system**
>
> Serengeti Tracker is not just an electronic billing system. It is a shared, web-based matter management system that includes matter information, status reports, budgets, dates/events, documents and other matter management features. Accordingly, it is important that attorneys and staff, in addition to billing managers, have User IDs and passwords. Although staff can do all of the work in the system on behalf of attorneys, it is important that attorneys be created as users in the system so that your client can identify the attorney as the lead attorney for matters, and produce reports related to each attorney.

Note, however, that it is not necessary to enter all timekeepers who will be working for your client! You only need to create a user if one of the above categories is applicable to the user.

To create a user, do the following:

1. Click on the **Users/Firm** button.
2. Click **Add a User** on the left under "What You Can Do."
3. Fill in the fields on the new user form.
4. After filling in the fields, click **Save & Close** on the left under "What You Can Do."

NOTE: User's Email Address Must Be Unique

One of the security and practical design features of Serengeti Tracker is that a person's User ID must be his or her email address. This means that a user must have a unique email address to be able to receive a User ID to access the system. For instructions what to do if two or more users share the same email address, click on the help link to the right of the User ID/Email field.

TRAINING INSTRUCTIONS FOR USERS

Training for Serengeti Tracker takes about one hour, and *it is strongly recommended that Tracker firm administrators, secretaries supporting attorneys, and billing managers/clerks participate in the training.* Training sessions are available at regularly scheduled times each week, as shown in the table below. The training covers all aspects of the system, including how to post electronic invoices.

North America Training Times	International Training Times
Tuesdays at 12:00 pm Eastern Time Thursdays at 2:00 pm Eastern Time	**Europe/Middle East/Africa:** Wednesdays at 2:00 pm London, England Time (GMT) (6:00 AM Pacific Time – Wednesday) **Asia/Pacific:** Friday at 10:00 AM Tokyo, Japan Time (6:00 PM Pacific Time – Thursday)

<u>Instructions how to signup for a training session:</u> A user must signup for training to be able to participate in a training session. The form for registering for a training session is presented to each user when the user logs into Tracker for the first time. In addition, users can access the registration form by logging into Tracker, clicking on the **Help** button in the upper right corner, and then clicking on the **Tutorials & Training** tab.

Other Training Resources

Online tutorials are an alternative to attending a live training class. For example, there are specific tutorials about posting invoices, entering budgets, and using the system. Users can access the online tutorials by clicking on the **Help** button in the upper right corner of the screen, and then clicking on the **Tutorials & Training** tab.

Setup Step 5:
Review List of Matters Created by Your Client

No firm user has automatic access to all matters, ***even your firm's administrators***. However, it is possible for you to view a full list of all matters that your client has created and connected to your firm for billing. To view this list, do the following:

1. Login to Serengeti Tracker.
2. Click on the **Invoices** button at the top of the screen.
3. Click on the **Post Invoices** tab. This will then display a full list of matters that your firm has with the client.

If one or more matters that your firm is handling for your client does not exist, your firm cannot post an invoice for that matter (the reason is because you must post an invoice to a specific matter in Serengeti Tracker). Law firm users cannot create matters in Serengeti Tracker. Consequently, you should contact the lead attorney at your client, and request that he or she create any missing matters in Serengeti Tracker.

> **NOTE: More information about accessing matter details**
>
> As indicated above, Serengeti Tracker is designed so that users responsible for posting invoices can view a list of matters for posting invoices under the "Post Invoices" tab under the "Invoices" button. The detailed matter information for each matter, however, is found under the "Matters" button. Because the detailed matter information may contain confidential client information, a user must have been given access to the matter to be able to see the matter listed under the Matters button.
>
> If a user needs access to the detailed matter information, there are two ways in which that access can be granted. First, your firm's lead outside counsel assigned to the matter can select up to five "delegates" who will have automatic access to all of the lead outside counsel's matters. For more information about delegates, click on the **Help** button in the upper right corner, and do a keyword search for "delegate". Alternatively, your client can also give the user access to the matter. For more information about matter access, click on the **Help** button in the upper right corner, and do a keyword search for "access".

Post-Setup Maintenance of Your Firm & User Information

How to Update and Maintain Firm and User Information

As your firm works in Serengeti Tracker, certain information may need to be added or updated, including:

- Edit your firm profile (e.g. the Lead System Administrator needs to be changed)
- Create additional offices, or update existing office profile information (e.g. update the office's billing remittance address)
- Create additional users
- Deactivate users who are no longer with your firm

The Quick Reference Guide for Law Firm Administrators explains how to perform all of the foregoing (you can download this document by logging into Tracker, clicking on the **Help** button in the upper right corner of the screen, and then clicking on the **Reference Materials** tab). In addition, there are detailed help files about these topics in the online help.

NOTE: Company Users Cannot Edit Your Firm Information or User Information

Your firm is responsible for managing your firm's information in Serengeti Tracker. In other words, company system administrators cannot edit any of your firm information or any of your firm's user information. However, company system administrators can do the following:

- create firm users with a system role of "firm user" (i.e. create a firm user with no special rights)
- create an office for your firm (although your firms will still need to provide additional office information)

If a company system administrator creates a firm user or an office, your firm's Lead System Administrator and Backup System Administrator will be notified via email. However, after a company system administrator creates a firm user or an office for your firm, the company system administrator cannot edit that user's information or the office information. Thus, if the company system administrator accidentally misspells a user's name when creating a firm user, or creates an office for your firm that in not correct, the company system administrator will NOT be able to correct those mistakes, and the mistakes will have to be corrected by one of your firm administrators.

Working with Multiple Clients on Serengeti Tracker

When you first setup your firm, you will probably only be working with one client on Serengeti Tracker. However, other clients may also begin using Serengeti Tracker, in which case you will be working with multiple clients on the system.

Serengeti Tracker has a unique architecture that makes it easy to work with multiple clients in Tracker. The simplest way to understand the architecture is to think of each firm as having its own database that contains:

- The firm profile (designates Lead & Backup System Administrators)
- Office profiles (designates Office System Administrators)
- User profiles

As each new client comes onto Serengeti Tracker, the system points the client's database to the firm database. **Figure 3** on the next page is a schematic diagram that shows how your firm's administrative information (firm profile, office profile, and user information) is maintained separately from your clients' information, matter information, etc.

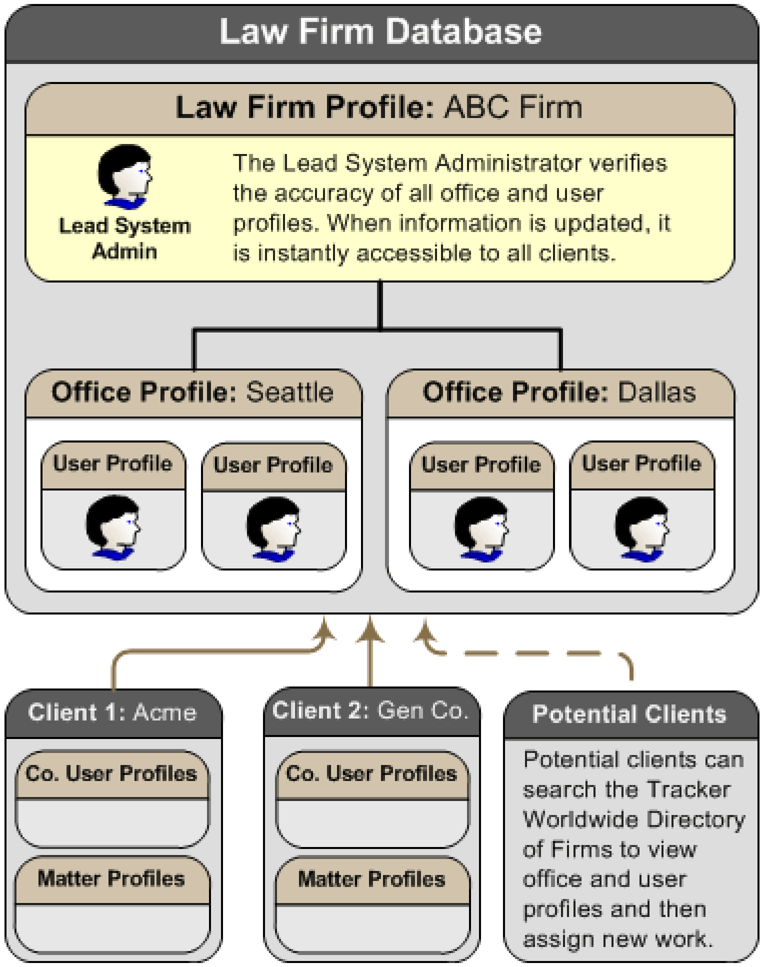


Figure 3

The unique and proprietary architecture of the Serengeti Tracker system has several important benefits:

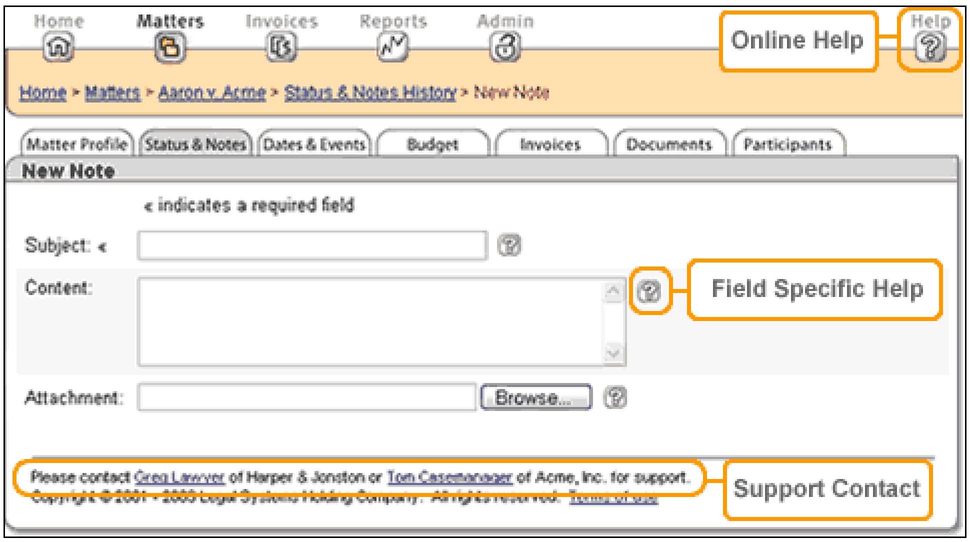
- **Users only need one User ID and password for all clients on Serengeti Tracker!**
- **The Serengeti Tracker architecture keeps your firm, office, and user information automatically synchronized for all clients.** Whenever you update firm or office profile information, create new users, etc., or whenever a user updates his or her user profile information, that information is instantly updated for all your clients. Thus, the Serengeti Tracker architecture saves you from having to enter duplicate data, and eliminates inconsistent data entry in multiple clients' systems.
- **Other prospective clients can search for your firm in the Tracker Worldwide Directory of Firms.** As illustrated in the diagram above, even if your firm is not connected to a company in Serengeti Tracker, other clients and prospects can search for and find your information in Serengeti Tracker. In fact, many companies have hired law firms because the firm is already on the Serengeti Tracker system. For more information about the Tracker Worldwide Directory of Firms, click on the **Help** button in the upper right corner, and do a keyword search for "worldwide directory".
- **The Serengeti Tracker architecture makes Serengeti Tracker the easiest system to implement as your clients come onto Serengeti Tracker.** Serengeti Tracker is already the easiest system for companies to implement (implementations take 1-3 months, while other systems can take more than one year). For example, as your clients come onto the Serengeti Tracker system, they can locate

your firm in the Tracker Worldwide Directory of Firms, and "drag and drop" your firm information into their database, and start working with your firm immediately!

Additional Help & Support Resources

Online Help

The Serengeti Tracker online help should easily answer any question you may have about the system. Below is a description of the types of online help resources:



- **Field-Specific Help.** Every field that you fill out in Tracker has a question mark to the right of the field (see image above). This is a link to a help screen that will provide information about the nature of the field and how it should be completed.

- **Online Help -- Detailed Help Database.** Click on the **Help** button in the upper right corner of the screen (see image above) to access the "Serengeti Tracker Help Center." The Help Center contains a detailed database of help topics, keyword search capabilities, and critical troubleshooting resources to resolve common problems.

- **Quick Reference Guides.** Tracker's Quick Reference Guides are 3-4 page documents that provide clear, step-by-step instructions how to use the functionality in Tracker, such as posting invoices, status reports, budgets, etc. Each user is given an opportunity to print out the Quick Reference Guides when the user first logs into Tracker. In addition, users can download and print the quick reference guides at any time by clicking on the **Help** button in the upper right corner of the screen and then clicking on the **Reference Materials** tab.

- **Online Tutorials.** Online tutorials are an alternative to attending a live training class (see Step 3 above for instructions how to signup for live training). For example, there are specific tutorials about posting invoices, entering budgets, and using the system. Users can access the online tutorials by clicking on the **Help** button in the upper right corner of the screen, and then clicking on the **Tutorials & Training** tab.

Invoice-Related Resources

Serengeti has prepared a separate document about all invoice-related issues called "Electronic Invoice Format Requirements & Posting Instructions." This document should have been attached to the first email you received containing your User ID and initial password. You can also download the document by doing the following:

1. Click on the **Help** button in the upper right corner of the screen
2. Click on the **Reference Materials** tab
3. Click on the file named "Tracker Invoicing Requirements & FAQs - Law Firm Billing Manager"

Access & Technical Problems

If you are not able to access to Tracker login page, please make sure that your connection to the Internet is functioning. If your technical problem does not relate to your Internet connection, please contact support as indicated below.

Support Contact Information

Please use the online help described above to find answers to your questions about the Tracker system. If you are not able to find the answer to your question in the online help, or if you have any technical problems with the system, please contact the designated support contact at your client (called the client Tracker Coordinator), whose name is displayed at the bottom of every page in Tracker.