3E RECORDS

WITH 3E RECORDS YOU CAN:

- **Automate and standardize** file creation, tracking, and review
- **Ensure compliance** with internal policies and external regulations for retention and disposition
- **Manage physical and electronic files**, including DMS files and email messages and attachments
- **Configure default behaviors** and setups for users, roles, and offices
- **Improve** client service
- **Automate retention review** and file disposition processes

STREAMLINE AND AUTOMATE RECORD PROCESSING

A robust records software solution should manage both physical and electronic records, while giving lawyers, clients, other firms, and vendors quick and easy access to the information they need. 3E Records™ automates and standardizes file creation, tracking, and review to improve efficiency and speed information access across your firm. Powerful records management capabilities are delivered through a convenient, easy-to-use dashboard interface. Originally certified by the U.S. Department of Defense under the 5015.2 standard, Records provides a sophisticated infrastructure that enhances productivity, reduces risk, and streamlines manual processes.

Records is an integrated component of the 3E Business Optimization Suite™, a powerful business process platform designed specifically for legal and professional services firms. 3E® provides core financial management and practice management features along with built-in application development capabilities that help transform your firm's unique business processes to achieve strategic advantage.

With 3E Records you can move ahead to a more profitable future knowing that you are working with one of the world's leaders in providing professional services firms with the most innovative of business solutions. With more than 60 years of experience, Thomson Reuters Elite has the proven expertise to make it happen for you.

AN INNOVATIVE AND GLOBAL LEADER

Thomson Reuters Elite offers a complete Enterprise Business Management Solution to run all operational aspects of your firm, including business development, risk management, client and matter management, and financial management. Using our integrated suite of offerings enables you to increase visibility and streamline workflow, ultimately improving profitability and exceeding your clients' expectations.
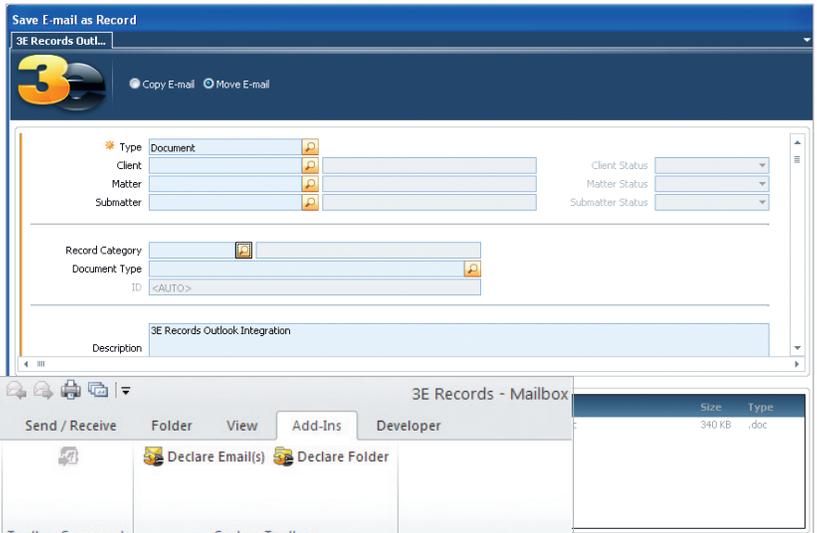
THOMSON REUTERS™

ELECTRONIC RECORDS MANAGEMENT

- Autonomy iManage DMS integration allows DMS files to be declared to Records for application of the 3E retention schedule, review, and disposition functions

- Microsoft® Outlook® integration enables email and attachments to be automatically declared as records to 3E

- Local and network file management options allow users to attach documents to Records and manage them, apply retention rules, and dispose of them according to the 3E retention schedule

- Records' automated retention review and disposition processes allow application of the Records retention schedule to both physical and electronic files

CIRCULATION MANAGEMENT

- Powerful new features enable users to easily track and circulate physical records

- Users can set multiple origins for a file, such as the Office of Record, the Creation Office, and the Filing Location

- Firms can circulate files and containers to any fee earner, 3E user, or third party in addition to lawyers and records department staff

- In-depth tracking, auditing, and inventory features automate circulation processes and keep circulation records up-to-date

- Users can quickly ascertain a file's status and view its circulation and modification history

- Additional features include the ability to automatically detect misfiles, the circulation of containers, and the ability to request files online

Declare email messages and/or attachments with 3E Outlook integration.

With powerful features such as the Circulate to Location/Container screen, users can easily track and circulate physical records.

POWERFUL RETENTION AND DISPOSITION PROCESSES

- Flexible retention scheduling gives firms the ability to set multiple retention schedules to meet the needs of various file types or multiple jurisdictions

- Firms can set different baselines that contribute to the master schedule

- Users can easily create custom scheduling triggers to determine specific date calculations for retention review dates

- Email notifications are available for initial review notifications, followup tracking, approvals, escalations, and client notifications

- Users have the ability to create holds (also known as preservation orders) to prevent a record from being modified or destroyed when it is otherwise eligible

- Retention review and disposition workflows allow users to complete the review and disposition process directly within 3E for both physical and electronic files

- Vital records can be scheduled for periodic review outside of the retention review and disposition process

3E RECORDS

SECURITY

- 3E platform security is role-based, and firms can create as many roles as desired

- Access to records documents can be restricted to groups or individuals

- Comprehensive audit controls provide a full history of all changes

- Users can be placed into multiple roles

- Comprehensive security infrastructure offers item-specific protection at all levels within the database

PERSONALIZED FOR YOUR BUSINESS

Rapid application development capabilities in 3E allow firms to employ a Software Factory approach to personalizing solutions, resulting in a reduced total cost of ownership. Firms can modify screens to use unique terminology, adapt work processes to match the way the firm operates, and create additional database tables to link data with external applications or data sources. All of these changes remain intact when firms upgrade to the next version of 3E.

ROBUST SECURITY AND AUDIT CAPABILITIES

Powerful 3E platform security ensures that only users with appropriate rights can retrieve information. Access to client, matter, or master files can be restricted to firm-defined roles or individuals, and optional audit controls provide the flexibility to track the total change history of vital data files, or even critical configurations such as taxes.

YOUR PARTNER FOR SUCCESS

Thomson Reuters Elite offers an end-to-end Enterprise Business Management Solution that allows law firms and professional services organizations to run all operational aspects of their firms, including business development, risk management, client and matter management, and financial management. As an industry leader for organizations across the globe, we understand the business and financial aspects of firm operations, and we have the tools to streamline processes, improve efficiencies, and provide the flexibility you need to change and grow your business.
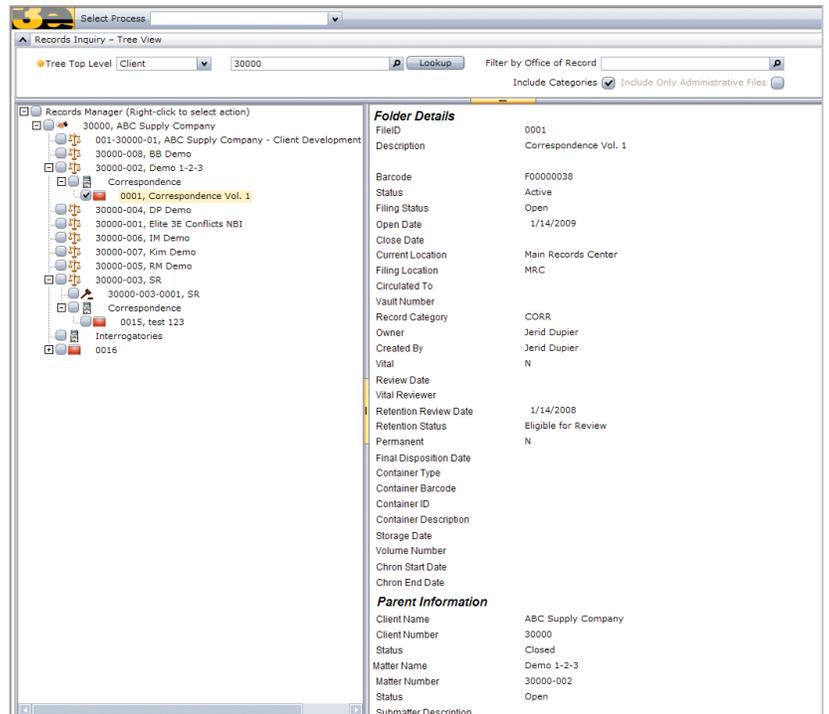
The Inquiry/Tree View process shows the big picture of all files attached to a client, matter, etc.

To learn more about 3E Records or for a global list of office locations, visit **elite.com**.

THOMSON REUTERS™