3E Data Insights

A POWERFUL WAY TO TRANSFORM, ANALYZE, AND VISUALIZE YOUR DATA

Metrics drive behavior, and it’s important to have the right metrics to run your business better. 3E® Data Insights from Thomson Reuters Elite delivers with rich, persona-based visual analytics available anywhere and anytime. Data Insights uses a feature-rich self-service data warehouse console with Microsoft® Power BI®—a leading, cloud-based business analytics service—and 3E Workspace to provide actionable metrics that drive behavior.

GAIN ACTIONABLE INSIGHTS AND MAKE DATA-DRIVEN DECISIONS THAT HELP KEEP YOUR BUSINESS ON TRACK

- Spot trends as they happen with powerful and insightful visual analytics
- Get forecasting and advanced analytics for fee earners and managers out of the box
- Create interactive reports and dashboards easily without writing any code using Power BI

DATA INSIGHTS DELIVERED WITH STANDARD CONTENT

- Delivered with standard content, Data Insights provides out-of-the-box analytics, reports, and dashboards that visually indicate the health of your firm
- The Data Insights approach to delivering standard supported content enables a streamlined implementation cycle, allowing firms to see reports sooner
- Included analytics and visualizations support Working Capital, Revenue Detail, Individual Fee Earner Performance, Productivity, Net Investment, Lockup, and more

BUILT ON MICROSOFT BUSINESS INTELLIGENCE TECHNOLOGY

- Analysis Services loads data into high performance tabular models capable of exceedingly fast query response times
- Tabular models provide a rich meta layer to map complex data relationships and deliver standard formats for uniform report design
- A rich statistical language, used by data scientists to build models to predict and improve the course of business processes, is part of the Power BI product suite. Leverage published R visuals, or build your own with this open-source platform.

DATA WAREHOUSE CONSOLE IS THE 3E DATA INSIGHTS FOUNDATION

- Bring your software data and custom data together in one warehouse
- Delivered with standard content that supports a self-service analytics model
- Business analysts and other data savvy users can clone and modify standard content to create firm-specific KPIs

Data Insights delivers persona dashboards tailored and filtered for what each individual manager needs and makes them readily available on the desktop and mobile device.
POWER BI DESKTOP

• Create stunning reports with interactive data visualizations. Tell your data story using a drag-and-drop design canvas and more than 100 modern data visuals from Microsoft, partners, and the community.
• Connect SQL Server databases, Analysis Services models, and many other data sources to create interactive drillable reports to reveal insights into your data assets
• Predictive analytics provide insights to help you run your business better using quick analytics and simple forecasting techniques

POWERBI.COM SERVICE

• A cloud-based business analytics service
• Create dashboards using the visuals from Power BI Reports
• Ask questions in natural language, and predictive visualizations appear as you type
• Harness the power of cloud (SaaS) products like PowerBI.com and receive new features as soon as they are ready

3E DATA INSIGHTS IN THE CLOUD—DATA ANALYSIS AS A SERVICE (DAAAS)

• 3E Data Insights in the Cloud is built using different Microsoft technology except for the Power BI components
• Azure SQL Server Data Change Tracking instead of SQL Server Replication
• A combination of Azure Data Lake and Azure Analysis Services is used for the data warehouse and analytics
• The Data Warehouse Console is a cloud web application
• Security is managed with Azure Active Directory

HOW 3E DATA INSIGHTS IS DIFFERENT IN THE CLOUD

• It leverages Microsoft’s high availability, highly scalable services, and cloud approach to security
• The Azure Data Lake provides the opportunity to ingest many different formats of data, not just SQL tables, such as text files, Word Documents, JSON files, Images, PDFs, and videos.
• The Data Warehouse Console functionality is highly restricted in the earlier cloud versions
• Currently, only 3E in the Cloud data is available for reporting in 3E Data Insights in the Cloud. Blending other data sources into the cloud version of the Data Warehouse Console is currently not supported.
• Modifications to tabular models and transformations are currently not allowed. This functionality will be rolled out in future releases.
• Currently, we are not supporting hybrid scenarios (i.e. on-premises 3E with 3E Data Insights in the Cloud)
PERSONA DASHBOARDS

Multiple persona-based dashboards provide individuals in your firm metrics specific to their role, helping them effectively manage their tasks and performance.

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<thead>
<tr>
<th>DASHBOARD</th>
<th>PERSONA TOP QUESTIONS</th>
<th>DASHBOARD BENEFITS</th>
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| Firm Insights (Firm and executive-level managers) | • How is the firm performing against targets?  
• Is the firm profitable or profitable enough to increase the bottom line? | • See firm performance at a glance  
• See top performers, under performers, and outliers  
• View firm profitability and see indicators that can pinpoint issues  
• See cost and margin details broken down to the level and dimension you need to manage the firm |
| Practice Group Insights (Practice group lead) | • How is my practice group performing against targets?  
• What is the profitability of my practice group? | • See practice group performance and profitability  
• Understand how to monitor and change individual contributors  
• Leverage the data to increase profits and gain efficiencies that can make my practice group more competitive |
| My Performance (All working fee earners) | • Am I meeting my targets?  
• Am I missing any time?  
• How is my utilization?  
• What work have I done for my clients and matters? | • Shows missing hours YTD  
• Shows work hours against YTD target  
• Shows the work done for individual clients and matters |
| Billing Timekeeper Insights (Billing fee earners) | • Is my WIP and AR aging within acceptable standards?  
• Am I meeting my billing targets?  
• What is my billing realization against standard billing rate? | • Quickly see if WIP and AR targets days outstanding are meeting the targets  
• Shows how long it takes on an average bill  
• View intuitive profitability analytics on clients and matters |
| Originating Timekeeper Insights (Firm managers and originating fee earners) | • What matters do I share origination with other originating fee earners and what’s my % origination credit?  
• What are the stats and targets for the matters I help to originate? | • See matters with shared and non-shared origination credit  
• View current and historical performance for these matters  
• See other individuals who are responsible for billing and otherwise managing the matter |

To learn more about 3E Data Insights, visit elite.com/3e-data-insights.