AUTOMATE AND TRANSFORM YOUR DATA

No segment of your firm is immune from the requirement to generate fast, readable, and professional documents. Yet many firms are still dealing with isolated information that isn’t easily available due to outdated formatting and distribution technologies. Thomson Reuters Elite provides a way to erase these limitations with 3E® Templates™ (formerly Design Gallery™). This powerful document automation solution is designed to effectively and efficiently automate the process of turning your back-end data into usable business documents.

Templates streamlines the collection, conversion, and distribution of your data. It takes data from 3E, Enterprise®, and other host systems and transforms the content into a variety of output formats for automatic distribution via print, email, file locations, or document management systems, simultaneously. You can have the speed and flexibility you need to create the custom outputs that support specific and often varied document requirements.

Powerful design tools further enhance your firm’s document production. A component-based design allows you to organise and build your formats into smaller, more manageable parts which can be shared among your various formats. High flexibility lets you define how your formats are styled and controlled by business logic, allowing you to build customised formats that meet your firm’s specific needs. In addition, the Visual Designer tool offers a Microsoft® Word-like interface to visually create components in a create-and-see-as-you-go experience.

With 3E Templates 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 70 years of experience, Thomson Reuters Elite has the proven expertise to make it happen for you.

INNOVATIVE SOLUTIONS FOR MORE THAN 70 YEARS

Whether you are part of a global institution, a multi-national firm, a boutique practice, a mid- or small-sized firm, a corporate legal department, or a government agency, Thomson Reuters Elite can provide you software products and services that help you broaden your strategic visibility over your business operations, simplify and boost firm-wide compliance, and confidently take on the future.
3E TEMPLATES

HIGH SYSTEM STABILITY AND PERFORMANCE

Templates enables you to save time, money, and resources by taking data from your Enterprise and 3E systems and transforming it into a variety of formats, including Microsoft Word, Excel®, Adobe® PDF, ASCII text files, XML files, and other types of output. The core functionality is compartmentalised into reusable activities backed by Windows Workflow Foundation to allow for high flexibility and future extension.

- Source files to be processed can be acquired by monitoring folders or directly via Web Service requests
- Acquired files will be matched up to the associated published solutions
- The Execution Engine processes the files quickly following the instructions defined within the solutions to generate and distribute the output required
- Standardised logging places all event information into one location for monitoring and troubleshooting

POWERFUL TOOLS

Robust tools provide the flexibility you need to support your varying document requirements.

- Solution Manager is used to create and manage the various aspects of your Templates solutions. It allows you to organise and build your formats into smaller, more manageable document parts (called components), all of which are stored in a version-controlled repository for easy access, sharing, and rollback. Solution Manager leverages the following tools:
  - XML Editor is used to create and edit components in an editor experience
  - Visual Designer is used to visually create components in a Microsoft Word-like experience
  - Process Designer is used to visually dictate and control the document automation process
  - Text-To-XML Designer is used to create templates that convert non-XML source files into XML for further processing
- Administration tools are used for monitoring, managing, and publishing to the server environments. The Administration tools are made up of the following:
  - Configuration tool is used to define environments used by the Administration tools
  - Publisher is used to publish solutions from the repository to the Execution Engine
  - Instance Manager is used to monitor, manage, and execute solutions that have been published
  - Property Bag Manager is used to define and centrally store common information needed across multiple solutions for easy management and updating

BENEFITS

- Automate manual document processes such as creating and distributing invoices and pro formas
- Improve client relations by efficiently meeting client bill format requests
- Increase firm-wide visibility and management control with readable information distributed electronically
- Reduce time and effort in evaluating new business with conflicts reports formatted professionally and distributed quickly and efficiently
- Quickly analyse your data for better decision making
- Efficiently create components with a familiar Microsoft Word-like experience

To learn more about the latest release of 3E Templates, or for a global list of office locations, visit elite.com.