Thomson Reuters FirmFlow API Utility and Implementation

Fact Sheet

Summary
The Thomson Reuters® FirmFlow API Utility is a program that retrieves data through the FirmFlow API and stores it in a local SQL database. As a result, your firm can run specific queries and connect this SQL database to various business intelligence (BI) and analytic tools to gain insights about your firm.

Several BI applications and third-party vendors provide technologies that can consume the data and aim to allow for easy interpretation and big data analysis. Proactive firms like yours use the enhanced analysis to support a wide range of business decisions ranging from operational to strategic. Applications such as Microsoft® Power BI help to offer decision makers in your firm with additional reporting tools, performance metrics, and data mining abilities.

The data extracted from the FirmFlow API Utility offers your firm increased customization and flexibility. In addition, the data offers a means to greater insights for leaders when combined with third-party data by producing real-time updates related to day-to-day operations, positioning the firm to make smarter business decisions.

Pain Point
While powerful APIs have been available for years, many firms do not have the development staff or knowledge set available to execute and consume the data given the inherent complexity of writing API code. In order to identify new opportunities, bottlenecks, and produce automated reporting, your team needs access to real-time data in order to assure your firm is providing the very best service to your customers. Unfortunately, APIs require specific skillsets, and you do not have the development staff or resources needed in order to consume the data.

Solution
The FirmFlow API Utility allows firms to call the API and pool the data to a local SQL database — serving as a central depository for third-party business intelligence applications. The utility allows your firm to compile data across multiple service lines and workflow types available within Thomson Reuters® FirmFlow.
**Key Features**

- Removes the need of a software developer to retrieve and consume FirmFlow API's. (Note: experience with writing SQL queries is beneficial when using this utility.)
- Ability to automate retrieval of FirmFlow data on a schedule using Windows Scheduled Tasks.
- Access to additional data points are available when using the utility; such as duration between routing steps and historic deliverable comparisons.
- As new FirmFlow APIs are made available by Thomson Reuters, the utility and the resulting reporting capabilities will expand.

**Cost**

The FirmFlow API Utility is included with your existing FirmFlow license. For experienced firms with API implementations and projects, we offer online resources in the Help & How-To-Center: Search for the “FirmFlow API Utility” for more information.

We encourage you to explore implementation services available to expedite the learning curve and ease the initial installation and configuration of the FirmFlow API Utility.

**Implementation**

Installation and configuration services are available to assist your firm with installation and initial configuration of the FirmFlow API Utility. By working with Thomson Reuters, your team is provided additional learning resources to aid in a faster ramp up to implementing.

A) Foundational Installation and Configuration Service, for self-motivated firms who are confident in their technical know-how:

- Self-led e-learning
- Go at your own pace, work as your schedule allows
- Ability to revisit the content or involve other team members as needed
- Best fit for those who learn in a virtual setting with interactive training tools
- Comprehensive reference materials supplied

B) Guided Installation and Configuration Service:

- For firms that desire hands-on assistance (90 min conversation with your firm's “API champion”)
- Work one-on-one with an experienced consultant of Thomson Reuters
- Opportunity to ask questions on the installation process
- Validation that all foundational components are installed and configured, and that data is being retrieved with accuracy
- Comprehensive reference materials supplied

Want to learn more? Contact us at +1 800 968 8900 or cs.sales@tr.com.

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