

# Datasheet

## Tikit Template Management System

The Tikit Template Management System is unique in that it allows firms to reduce the amount of in-template code and the number of templates that have to be managed by the firm. The user interface (UI) enables template managers to make changes to templates quickly and without requiring any technical or development resource – ensuring both increased productivity and reduced risk.

### The need for a template management system

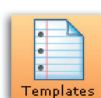
Firms typically have hundreds of different templates for numerous purposes, for example, letter, memo, fax, precedent and bill. This creates disorder for users when retrieving and using the 'correct' template, and difficulty in being able to effectively maintain the templates in a consistent and professional manner. Firms are also faced with the problem of having many versions of templates across practices and offices, lacking a centralised and structured approach to their templates.

### Specific Features

#### 1) TMS Administrator

The TMS Administrator is designed to provide control and ease of use when managing the templates. This enables template managers to create and maintain toolbars for the templates, which makes them specific to each template. Alongside this, quick changes can be made, for example amending the firm's details or making marketing updates. The significant advantage with this is that users do not rely on the development or IT team for assistance and managers are free to make updates as and when required.

Going forward, managers are able to build more complex templates as the need develops across the firm and within individual practices through TMS Administrator.



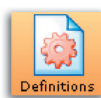
Select the template that is required eg letter, memo, fax, agreement, precedent, bill etc



Organise the page layout and style needed for your template



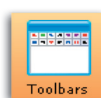
Make the content of the template specific to the necessary office



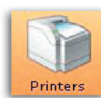
Bookmarks are listed which illustrate the content within the templates



The selected language will automatically be populated into the standard fields within the template making it specific to the intended recipient(s).



The toolbar provides functionality similar to that of Word



This displays the Tikit Printer Control Centre\* screen allowing an administrator to import existing printers, assign paper types to printer trays and organise which printers should be used for which documents

\* This product is an enterprise printer management solution and is part of the TikitConnect suite of products.



The option to select any 3rd party applications

### Firm-wide benefits

- Instant re-branding
- Unicode compliance
- Easy access to an organised and structured template library
- Consistency in firm-wide communications – locally, nationally and internationally

#### 2) Library of templates

The TMS provides a library of templates which can be used as a 'fast start' to meet the various needs of different firms, practices or users for their specific layout and style.

#### 3) The technology

The TMS has been developed on the TikitConnect Development Framework, and acts as a middleware application. At the heart of the TMS along with the Administrator UI, is the Template API library, which has several hundred documented functions encapsulating all common tasks related to document handling. Through the use of this library, in-template code is reduced to a minimum – leading to a reduction of template support issues with rapid and easy changes as required.

#### 4) Active Directories and security

The majority of a firm's templates are designed to be accessible for all. Increasingly however, there is the need to have restrictions on some templates – this could be within a firm, a department or for different office locations. Within the TMS, Active Directory security can be applied to templates to only show certain templates to certain groups or users.

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### Tikit Template Management System – continued

#### Integration with the firm's existing applications

The TMS integrates with a firm's 3rd party applications such as Client Relationship Management, Document Management and Practice Management via application independent connectors. This approach enables firms to upgrade or even change these applications completely, without requiring any modifications to their templates.

#### Localised support across offices

The TMS is fully unicode compliant, providing an open source platform for firms of any size, and particularly those with multiple offices. Users across offices, can then access the same templates but can customise them to make them specific to their local office.

For example, the office's local language and contact details can be easily selected into the necessary templates through an easy to use process. This makes the templates unique to that office, whilst still maintaining a consistency in branding and adopting a unified approach to the firm's overall communications.

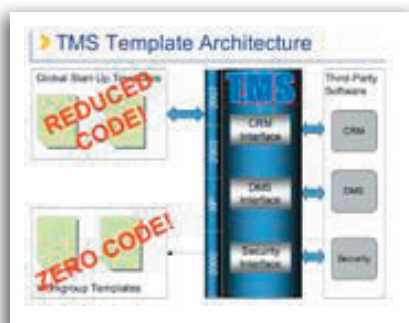
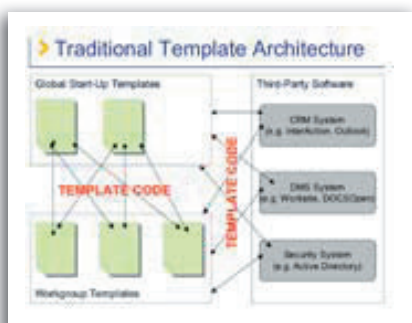
#### Import Wizard

In order to reduce the time taken to migrate existing templates into TMS, the TMS Administrator comes with some built-in import utilities. This allows an administrator to import templates, bookmarks, toolbars and form controls into TMS Administrator from their existing template solution. The import tools reduce migration / implementation time and provide a quick-start to the TMS implementation. This allows the developer to focus on centralising and de-duplicating the firm-specific business logic code.

#### How the Template Management System works

Before: Unstructured and ad hoc

After: Structured and methodical



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