



ELITE 3E MICROSOFT OFFICE INTEGRATION

WITH ELITE 3E MICROSOFT OFFICE INTEGRATION YOU CAN:

- Streamline access to information in Microsoft Office
- Simplify retrieval and analysis of 3E data in Microsoft Excel®
- Organize and store 3E reports and metrics using Microsoft Outlook®
- Improve time entry function via integrated time entry functions in Outlook
- Reduce error and time spent by managing critical appointments and tasks via 3E Calendar Management integration in Outlook
- Ensure proper retention and disposition of email and attachments with 3E Records integration

IMPROVE VISIBILITY OF CRITICAL INFORMATION

The powerful ELITE 3E® financial and practice management systems enable professional services firms to maximize efficiency, reduce costs and improve productivity. The 3E system is also enhanced with powerful Microsoft Office® integration capabilities that enable efficient access, in-depth analysis and easy sharing of 3E information. Users can directly access 3E client and matter information, financials, reporting and much more from within Excel, Word, Outlook, PowerPoint and One Note. The entire firm can work more productively and benefit from enhanced visibility of critical 3E financial and practice management data.

The 3E Business Optimization Suite is 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.

The world's leading law firms have turned to industry-standard software like ELITE 3E to improve processes and boost profitability. With more than 60 years of experience, Elite has the proven expertise to make it happen for you.

CONSULT THE EXPERTS

Elite has consistently been an award-winning provider of financial and practice management solutions to global professional services firms.

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KEY FEATURES OF ELITE 3E MICROSOFT OFFICE INTEGRATION

- Smart Tags streamline access and increase visibility into critical processes
- Special add-in menu item for Excel for additional analysis and formatting
- Integrated time entry from Outlook via timers. You can record time directly from email messages and calendar appointments
- Two-way 3E Calendar Management integration enables 3E events to be synchronized to Outlook
- 3E Records integration for managing email and email attachments according to the firm's retention and disposition policies

RETRIEVE AND ANALYZE DATA WITH EXCEL ADD-IN

- Excel add-in embeds 3E query functionality directly within Excel
- Ability to export data from 3E by directly querying the 3E database with an Excel-friendly user interface
- Create frequently used queries, auto-format query results and filter data as desired
- Macros and queries can be sent to other users who can execute the same macros and queries without needing to have the 3E add-in installed

STREAMLINE INFORMATION ACCESS WITH SMART TAGS

- Embed Smart Tags within documents that provide 3E information or launch 3E processes
- Smart Tags can be linked to 3E data, processes, reports and metrics via Smart Tag keyword and 3E configuration
- Configuration utility allows firms to determine archetype attributes as keywords and identify related 3E objects to be available to Office users

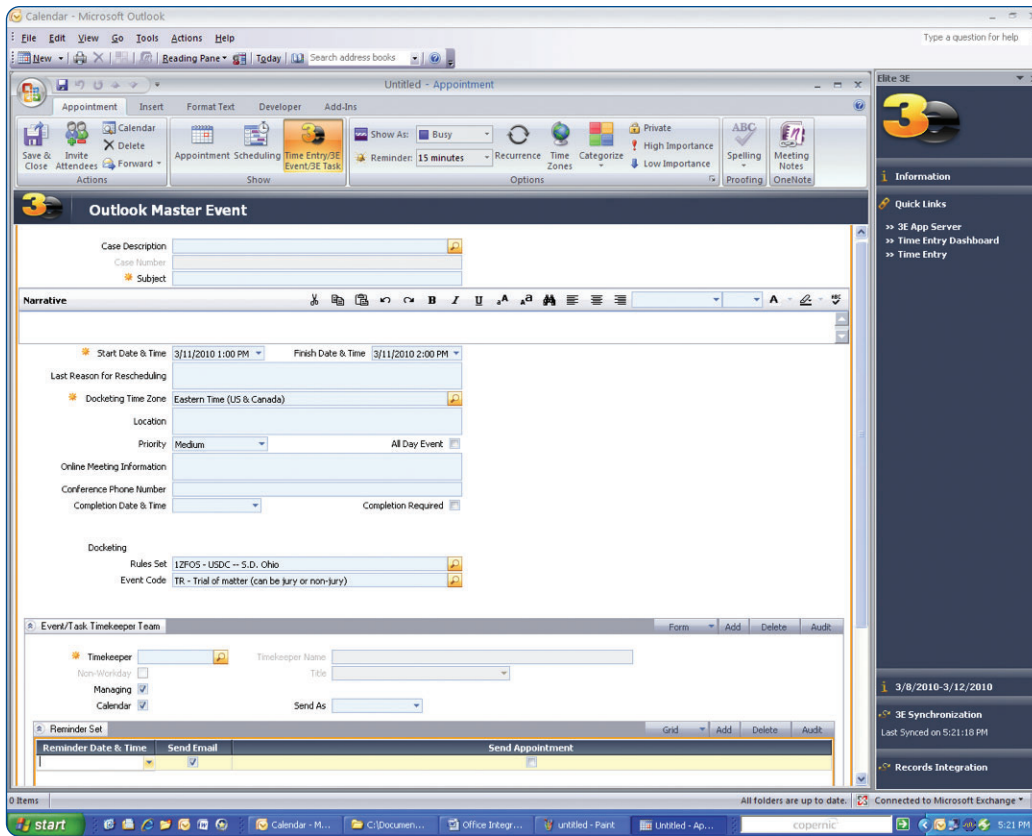
GATHER AND ORGANIZE CLIENT, MATTER AND CASE DATA WITH ONENOTE

- 3E matter tagged emails can be sent to OneNote
- New pages for the client and matter are added automatically to "Elite 3E" notebook
- Client and matter information are displayed on the page based on the firm's defined template
- Hyperlinks can be added to embed 3E dashboards, processes, reports and metrics within a notebook

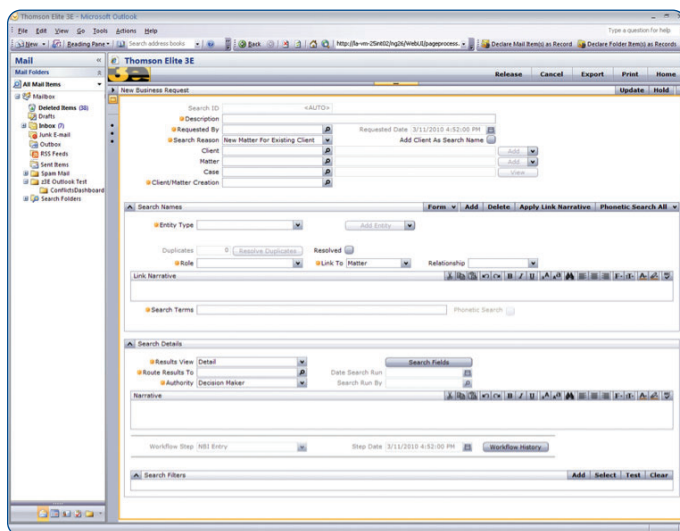
The screenshot shows the 'Elite 3E Export to Excel' application window. On the left, there is a 'Data' tab and a 'Criteria' section. Under 'Criteria', 'Show Metric Archetypes' is checked, and 'Timecard Summary (TimeCardSum)' is selected. Below this, a list of 'Attributes' is shown, including 'Amount Written Off (WOffAmtWOff)', 'Archetype (ArchetypeCode)', 'Billed Amount (BillAmtBill)', 'Billed Amount Collected (BillAmtColl)', 'Billed Amount Written Down (BillAmtWDown)', 'Billed Amount Written Off (BillAmtWOff)', 'Billed Amount Written Up (BillAmtWUp)', 'Billed Hours (BillHrsBill)', 'Billed Hours Collected (BillHrsColl)', 'Billed Hours Written Down (BillHrsWDown)', 'Billed Hours Written Up (BillHrsWUp)', 'Billed Hours Written Off (BillHrsWOff)', 'Collected Amount (CollAmtColl)', 'Currency (Currency)', 'Currency Exchange Date (CurDate)', 'Current Process (CurrProclenID)', 'Has Attachments (HasAttachments)', 'Last Process (LastProclenID)', 'Original Process (OrigProclenID)', 'Standard Amount (StdAmtBill)', 'Standard Amount Collected (StdAmtColl)', 'Standard Amount Written Off (StdAmtWOff)', and 'Timecard Index (Timecard)'. The 'Selected Attributes' section shows 'Group by Timecard Index.Timekeeper', 'Sum of Timecard Index.Work Amount', 'Sum of Timecard Index.Work Hours', and 'Sum of Timecard Index.Work Rate'. The 'Order By' section shows 'Timecard Index.Timekeeper.Timekeeper Name (Timecard1.Timekeep...'. On the right, an Excel spreadsheet is open, showing a table with columns: 'DisplayName', 'Sum_of_WorkAmt', 'Sum_of_WorkHrs', 'Sum_of_WorkRate', and 'WorkHrs'. The data is as follows:

	DisplayName	Sum_of_WorkAmt	Sum_of_WorkHrs	Sum_of_WorkRate	WorkHrs
1					
2	A	\$2,321.00	21.10	\$1,210.00	2.40
3	B	\$104.00	1.60	\$65.00	2.30
4	C	\$390.00	13.00	\$90.00	1.30
5	D	\$3,847.50	13.50	\$3,420.00	2.40
6	E	\$3,053.50	19.70	\$1,085.00	1.80
7	F	\$2,275.00	5.00	\$455.00	1.30
8	G	\$2,931.50	45.10	\$975.00	3.30
9	H	\$78,900.00	108.00	\$24,050.00	1.80
10	I	\$1,221.00	6.60	\$555.00	1.40
11	J	\$1,057.50	6.30	\$1,005.00	1.20
12	K	\$4,300.00	20.00	\$2,150.00	1.90
13	L	\$170.50	1.10	\$155.00	1.60

You can query for 3E data directly from Excel with the ability to generate macros for use by non-Excel Add-in users.



Add and modify 3E events and tasks directly from Outlook with optional Westlaw Legal Calendaring Rules.



Run any 3E process, report, metric—anything—directly within Outlook.

COMPLETE INTEGRATION BETWEEN 3E AND MICROSOFT OUTLOOK

- Embed reports, metrics, dashboards in Outlook – anything you can do in 3E you can do from 3E within Outlook
- Time can be entered directly from Outlook with full timer functionality, and can also be entered directly from email messages and calendar appointments
- Full two-way 3E Calendar Management integration allows lawyers to manage important client/matter dates, appointments and tasks including the ability to create new events/tasks with Westlaw Legal Calendaring Rules integration
- 3E Records integration allows users to declare messages and attachments to 3E and drag-and-drop functionality with auto-created matter folders makes declaration a snap
- 3E entities and Outlook contacts integration allow users to search for 3E entities from within Outlook and import them to create new Outlook contact records

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EMBEDDED WORKFLOW AND COLLABORATION

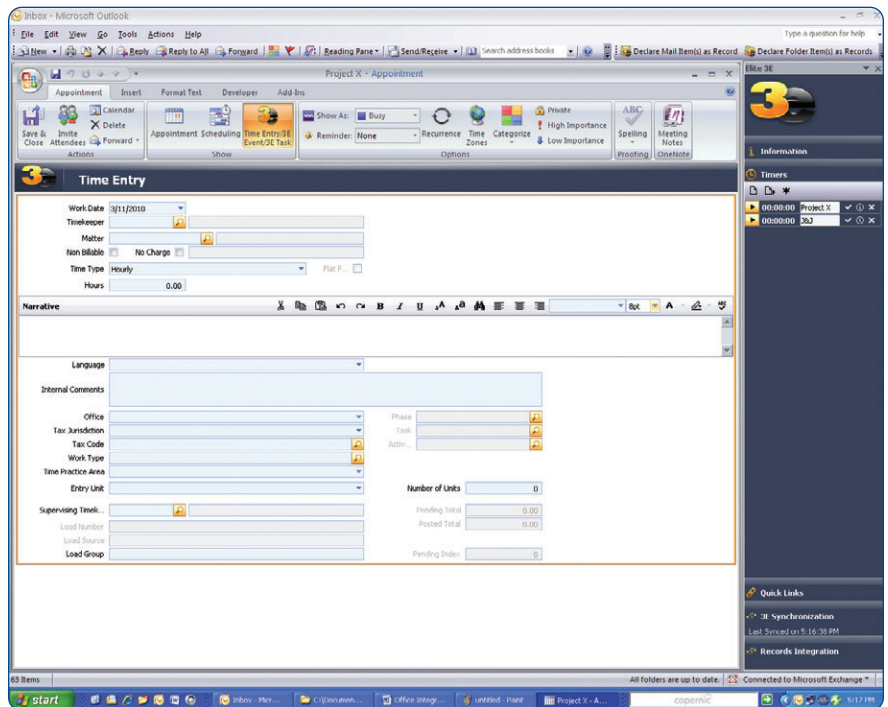
In addition to benefiting from the convenience provided by Office features, firms can also improve efficiency with the powerful 3E workflow and collaboration capabilities that allow firms to streamline, automate and track their business processes. Each screen in 3E is both collaboration enabled for ad-hoc input and comments from other individuals and workflow-enabled, so firms can automate processes in accordance with established policy.

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 and adapt work processes to match the way the firm operates. 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 project master files can be restricted to firm-defined groups or individuals and comprehensive audit controls provide a full history of all changes.



Enter time from appointments and email via Time Entry.
Track time with multiple timer support for ease of entry.

To learn more about ELITE 3E Microsoft Office Integration or for a global list of office locations, call 323-642-5200 or visit elite.com.