

ELITE PROCESS MANAGER



BUSINESS PROCESS MANAGEMENT SOLUTION FOR PROFESSIONAL SERVICES FIRMS

- Streamline approval processes, strengthen financial performance and improve client satisfaction
- Enhance productivity and collaboration across the firm
- Implement consistent policies and procedures complete with full accountability

It's All in the Details

Technology has automated many of the daily activities within most professional services firms. Yet work often grinds to a halt when critical information is missing, management approval is needed or input is required from other team members. Elite® Process Manager enables firms to better manage people-intensive processes and the relevant data and systems they are using to maximize productivity and efficiency. Process Manager is a workflow solution customized for the unique needs of professional services firms and based upon technology by Metastorm, the leading business process management solution provider.

Elite Process Manager Highlights

- Model processes with an intuitive graphical tool that provides a visual representation of the process map, including stages, forms, actions and associated decision pathways
- Automate processes based upon this model and take advantage of business rule engines, workflow and integration technologies to create a seamless, efficient process layer across multiple people, applications and databases
- Employ intelligent process-aware forms that control what the data users see based on their roles and level of authority
- Specify dynamic roles to determine who should initiate a process, view a folder, access a form or take an action; this ensures actions are made available only to users with the correct authority level, who reside in a specific department or who have been given appropriate approvals
- Define integration points with other systems using flexible Integration Wizards that provide simple fill-in-the-form screens to integrate with databases, email, Web Services and other applications
- Take advantage of Web Services standards including XML, WSDL and SOAP; this allows processes to use Web Services and to be exposed as Web Services that are used by other applications
- Participate in, manage and monitor processes through a single integrated Web client that satisfies all of the roles that a user may play in different processes
- Analyze processes based upon live process data to identify potential issues or areas for improvement

Automate Critical Business Processes

With Process Manager, daily work can be accomplished quickly and easily. Staff and professionals can now eliminate time spent tracking paperwork and approvals and focus efforts on higher-value work. Process Manager saves valuable time by automating and standardizing business processes with established routing and approval of electronic forms. Using Process Manager, authorization processes are simplified and completely secure. Users only have access to the information needed to perform the requested work. Process Manager provides a complete audit trail of authorizations and approvals, maintaining accountability and security.

Customizable Business Process Library

Firms typically use a wide variety of forms to record, route, collaborate on and approve work. Process Manager provides a library of business processes incorporating electronic forms that replace existing paper forms and expedite financial and practice management activities across the firm. Example processes include:

- New business intake
- Create record/folder
- Conflict check
- File closing
- Create case
- Record retention
- Create marketing contact
- Record request

Processes are fully customizable, follow user-defined routing rules and incorporate table lookups, drop-down lists, data validation, calculations, interprogram communication, scrollable lists and flexible security.



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Online Status Tracking and Reporting

Process Manager streamlines and automates the approval processes for all work in progress. Users can easily monitor the status of requests from their Watch List. When any action is required, they receive alerts via email that hyperlink to the work item so they can quickly respond. With Process Manager, staff and professionals are now free to focus on more critical matters while Process Manager ensures that the details are being handled behind the scenes.

Realtime monitoring and reporting provides authorized users with the ability to track work in progress, resolve exceptions and generate reports that help identify potential bottlenecks or performance issues. Information is collected on the performance of a process as well as any data collected on forms to provide a complete audit trail. Time-sensitive routing rules flag whenever an approval is delayed and automatically escalate or reroute the work item per the firm's approval process, avoiding time-consuming delays.

Comprehensive Integration

Process Manager provides Integration Wizards that enable easy integration with databases, email, Web Services and other applications. It works with any MAPI- or SMTP/POP3-compliant email system for delivery of work item notifications. The solution also integrates with the following applications in the Elite family of solutions for financial and practice management:

- Accounts Payable
- Conflicts Manager
- Marketing Manager
- General Ledger
- Billing Manager
- Practice Manager
- Case Manager
- Records Manager

Consult the Experts

Elite has a dedicated team of business process management consulting experts who focus on helping professional services firms better understand their business processes, identify efficiency gains, recognize strategic opportunities and implement business process automation solutions that match their unique vision and business objectives.

The screenshot shows a web form titled "New Business Intake - Client". It contains several input fields and dropdown menus. Key fields include "Client Last Name" (Jones), "Client Address" (1542 Anywhere Ave), "City" (Los Angeles), "State" (California), "Postal Code" (90001), "Business Type" (Health Care), and "Billing Arrangement" (Hourly). There are also buttons for "Client", "Matter 1", "Related Parties", "Create Records", "Show Conflicts", "Forward To User(s)", and "Save".

From the integrated Web client, users can easily participate in or manage processes. Work item notifications can optionally be sent to and launched from the user's email client.

Contact Elite to put the power of Elite Process Manager to work in your organization today. Visit www.elite.com for more information or call us at (323) 642-5200.



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