



ELITE ENTERPRISE 3.9 AND ELITE WEBVIEW 5.4

Move Up to a More Profitable Future



THOMSON REUTERS™

ELITE®

RESPONDING TO YOUR NEEDS

While many aspects of the law business are changing, one thing remains constant: firms need a software solution that will provide them with the flexibility and scalability to keep up with rapid changes in the marketplace. Firms need a solution that will enable them to become more agile, versatile and less dependent on manual processes, become more automated, streamlined, and efficient, and backed by a company responsive to their needs and suggestions.

Elite meets your needs with Elite Enterprise v3.9 and WebView v5.4.



ENTERPRISE 3.9 AND WEBVIEW 5.4 DELIVER WHAT YOU ASKED FOR

Elite values the input that its clients provide. The new versions of Enterprise, version 3.9, and WebView, version 5.4, are designed to enable you to move to greater profitability and with enhancements that were implemented as a direct result of your feedback and suggestions. Many of these will increase usability, enhance flexibility, and further streamline your financial and practice management processes.

Many enhancements give users more options in inputting information, resulting in quicker and more refined searches. For example, user defined fields (UDFs) have been

expanded to 120 characters, helping you better identify, organize, and find information when you need it. Within each module, specific enhancements provide tools that give users enhanced filtering, searching and entering capabilities.

Just a few of the many enhancements show that 3.9 and 5.4 make tasks easier and more comprehensive. For example, General Ledger inquiry screens enhancements let you drill down into a journal entry transaction and billing detail data. Extend™ offers a new Administrator's panel where all events can be tested, reviewed and tracked. Conflicts Manager offers additional sanction list integrations as well as enhanced filtering capabilities that allow you to apply clients, matters, cases, and vendors parameters to filter out unwanted related party and link data. You can now customize the Records Home Page views by user, and the Case Manager child events screen has been redesigned to add more options for creating ad hoc reminders. In Accounts Payable, you can now void multiple checks, saving significant time for your users.

Elite WebView has proved to be an essential tool for every firm, providing firm-wide access to critical business data stored within Elite solutions from any location with an Internet connection. Building on this rich capability, we've made WebView's anytime, anywhere information access even more user friendly. There are more options to sort for frequent clients, to search in Records Manager narrative fields, and to specify which client UDFs can be hidden or edited. Navigation in proforma has been improved and the Enterprise Bill by Exact Amount/Proportional feature has been added. Users can now filter invoice history data for a specified date range. Finally, Time Entry now allows multiple sets of Time Entry Report criteria per user and features built-in warnings when unfinalized or unassigned time exists in other months of the calendar year.

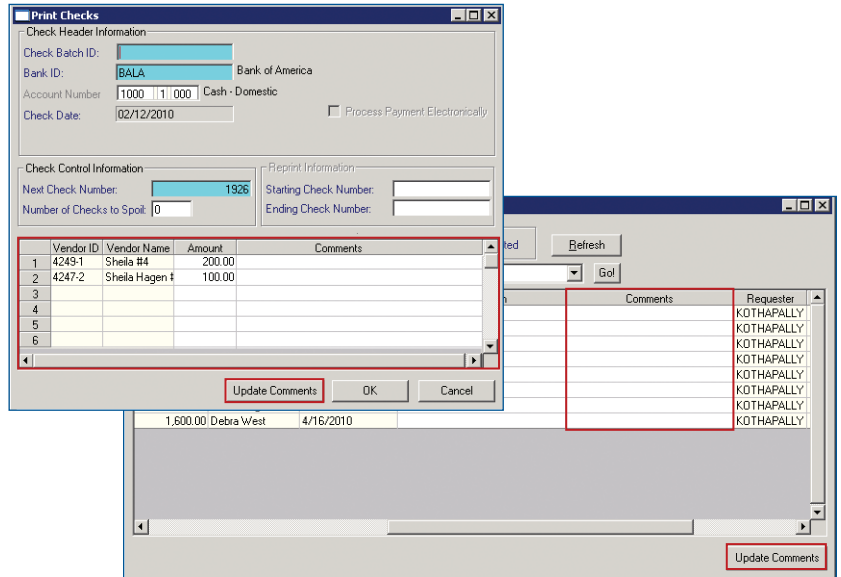
SIMPLIFY CASH MANAGEMENT

FINANCIAL MANAGEMENT

ACCOUNTS PAYABLE

The Accounts Payable application offers a full spectrum of features designed to automate and standardize the accounts payable process and effectively monitor and control cash outlays. You can easily handle all liabilities, costs, and charges in a single cash management system.

- In the Voucher Invoice number field, you can now enter suppliers' invoice numbers up to 30 characters. The Voucher ID field has been increased as well to allow for intelligent sequential numbering schemes.
- Authorized users can now modify nonfinancial fields for paid vouchers with a prior period date when Prior Period Entry is disallowed.
- Debit memos can now be applied against different addresses for the same vendor. This allows an annual discount to be applied against outstanding vouchers from different offices.
- Multiple checks can be voided, either by batch or by a range of checks.
- Users now have the ability to create informational notes specific to a check prior to the check being printed, allowing notes to be included on the printed check sent to the vendor.
- In the Bank Statement Handler multi-currency receipts, users now can process credits received in a currency other than that of the matter/invoice. Credits can be applied to a single bill, joint bill, or as unallocated.

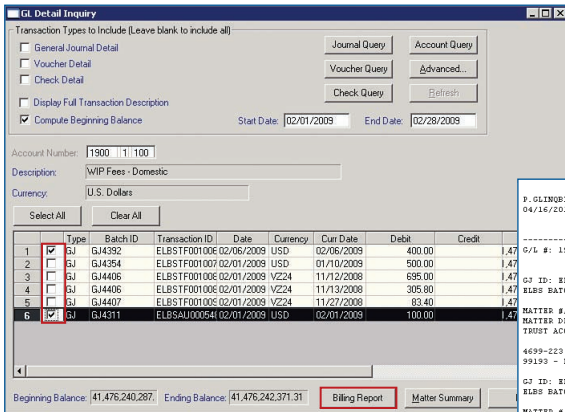


Informational notes for each specific check can now be created and included on the printed check.

GENERAL LEDGER

Enterprise enables you to efficiently manage financial transactions and improve cash, modified cash, or accrual-based financial accounting systems. You can quickly access financial statements, reports and other critical transaction information needed to make timely and informed business decisions.

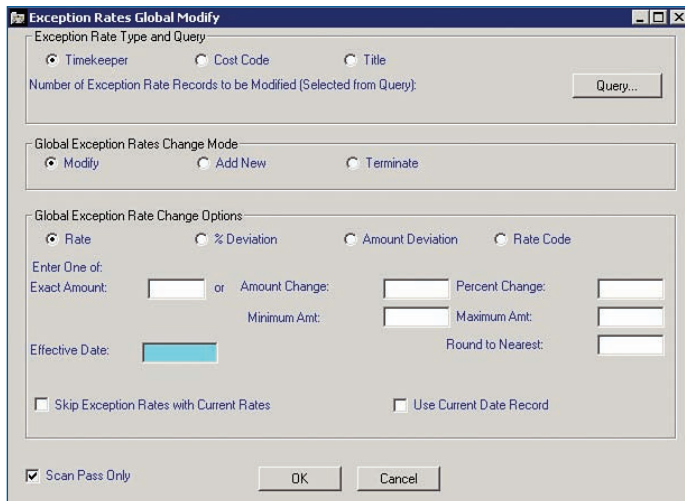
- Users now have the ability to choose to reverse General Journals (previously a manual entry was required).
- A user can now drill down on a GJ transaction for a finalized bill batch by launching the Billing Inquiry Invoice Summary form, resulting in faster resolution while reconciling transactions.



MATTER # / MATTER DESC. / TRST ACCOUNT	CLIENT NAME / NARRATIVE /	INDEX # / COST/SENDER	TRANS. DATE / DATE BILLED /	DOC. # / INVOICE #	QTY. / HOURS / AMOUNT	CURRENCY / TIMEKEEPER
6999-223	Winston Chang The Client, The Archi	12420			100.00	USD
99193 - Prof Edit						
GJ ID: ELBSTF001006	GJ DATE: 02/06/2009	GJ BATCH: GJ4392	GJ CURRENCY: USD	BATCH OPEN DATE: 02/06/2009	BATCH FINAL DATE: 02/06/2009	BATCH TYPE: TIME
ELBS BATCH: 4392	BATCH PERIOD: 209					
6999-242	Winston Chang The Client, The Archi	12536	02/06/2009		1.00	
99233 - Joint Mod					100.00	
6999-243	Winston Chang The Client, The Archi	12537	02/06/2009		1.00	
99233 - Joint Mod					100.00	
6999-244	Winston Chang The Client, The Archi	12538	02/06/2009		1.00	
99233 - Joint Mod					100.00	
6999-245	Winston Chang The Client, The Archi	12539	02/06/2009		1.00	
99233 - Joint Mod					100.00	

Reconciling can be a much quicker process with the new ability to drill down on General Journal transactions, accelerating the balancing process.

IMPROVE USER EXPERIENCE



Exception Rates Global Modify is now enhanced with a Terminate and Insert ability, in which a user can terminate an existing rate exception in one pass for a group.

BILLING MANAGER

A variety of specialized tools gives Billing Manager the ability to improve billing processes, including time entry, bill editing, and bill processing. From generating draft bills to producing accurate final invoices, Billing Manager accommodates the most complex billing scenarios. In addition, it delivers intuitive time and expense entry capabilities that allow you to shorten the work-to-cash cycle.

- An End Date has been added to Matter, Client & Discount Group Exception Rates.
- In master files, the Matter Global Modify has been enhanced with the ability to add Time/Cost UDF setups globally.
- The Matter & Client Exception Rates Global Modify now has the terminate and insert ability. Now a user can terminate an existing rate exception in one pass for a group of matters/clients and then create new exception rates for a group of clients/matters on another separate subsequent pass.
- Additional sorting has been added in Billing Inquiry. Billing Inquiry screens and drill-downs now have been enhanced to have Ascending-Descending column header sorting.
- Date Range and Period Range can now be entered for Ledger History and Open Invoices drill-downs in Billing Inquiry for Matter and Group Summary, prior to data being loaded.
- There is now a Spell Checker tools option to allow spell-check to function with Citrix Round Robin servers.

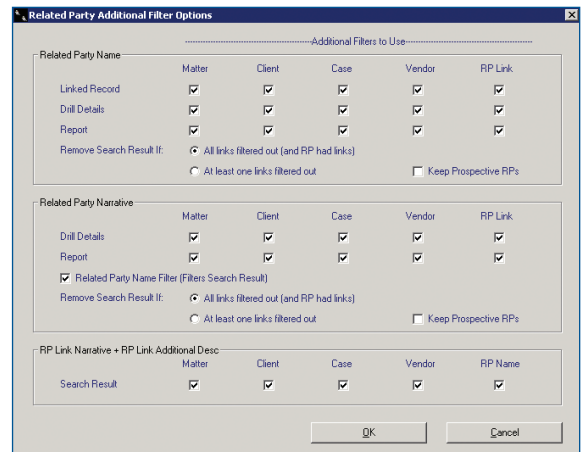
- In Proforma Edit, a new period control Open Closed option has been added called Proforma Entry. This can control certain selected Proforma-related functionalities that were previously controlled by Bill Entry option.

PRACTICE MANAGEMENT

CONFLICTS MANAGER

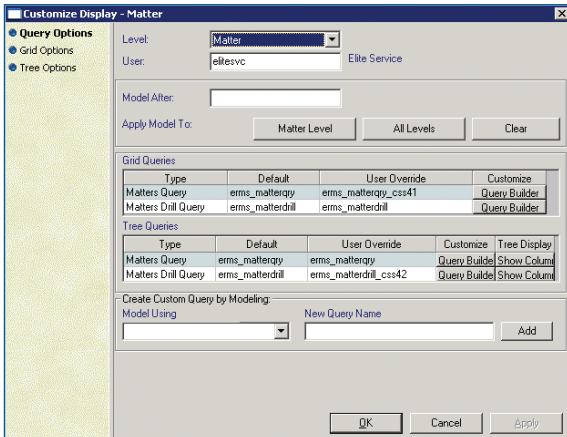
Conflicts Manager offers firms an effective and accurate means of identifying, evaluating, and resolving conflicts of interest. Comprehensive search options and efficient relevance filtering capabilities expedite thorough conflicts searches to greatly reduce the risk of exposure.

- Enhanced filtering capabilities allow you to apply client, matter, case, and vendor filters to remove unwanted related party and related party link data automatically from results and reports.
- Additional sanction list integrations have been added for Canada's OFSI list and the UK HM Treasury List.
- Users now have the option to manually resize search result grid columns.
- New integration with Online Screening (fka Complinet™) allows for additional anti-money laundering and Know Your Client compliance by screening names on over 150+ global financial sanction lists, politically exposed person lists, and adverse media.
- Full list search report updates include relationship code descriptions for Related Party links, Last Billed Date, Last Worked Date, and multi-payor information for multi-payor matters.



Conflicts Manager has been enhanced with filtering capabilities in which you can apply client, matter, case, and vendor filters to speed up the review process.

STREAMLINE RECORDS AND CASE MANAGEMENT



Users can now customize the Grid View, Tree View, and detail panels on the Records home page to their preference.

RECORDS MANAGER

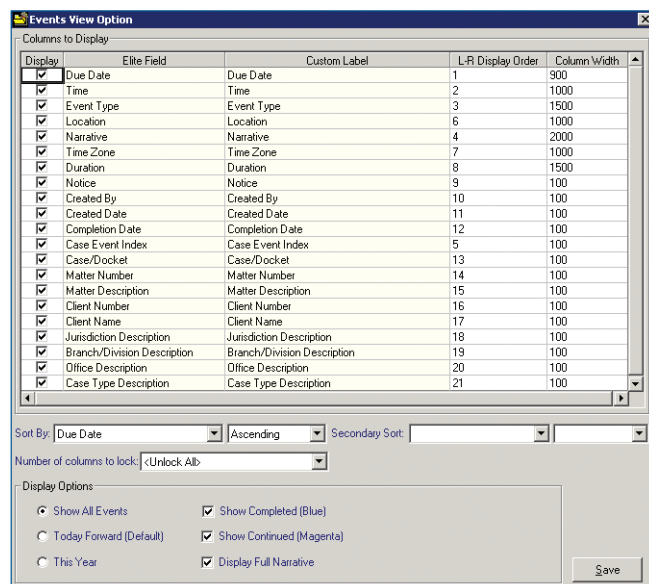
Comprehensive and integrated lifecycle capabilities let you easily manage physical and electronic records from creation through retention scheduling to final disposition. Records Manager lets you mitigate risk and maintain legal and regulatory compliance through the appropriate management of client records.

- The Records home page views can now be customized according to individual user preference. The Grid View, Tree View, and Tree View tree and detail panels can all be customized, so different users can customize according to their needs.
- Users now can export only selected rows to Excel™ in the grid view.
- Folder and Insert description lines have now been increased from three to five.
- Users can also opt for continuous typing/word-wrap in the Folder/Insert/Document description fields.
- You now have the option to remove files from box on folder inventory processing, and the ability to override the check-in date.
- Ethical walls can be created at the sub-matter level.
- Option to create insert as checked out if parent folder is currently checked out.

CASE MANAGER

Case Manager offers intuitive calendaring and docketing capabilities to manage the ongoing activities and events associated with each case. Users can easily access client and matter information, case details, financial statistics, events, assigned attorneys, related parties, and more from a single, integrated solution.

- The child events screen has been redesigned to be more intuitive and allow you to create ad hoc reminders for child events.
- The case type is now be displayed in the case UDF screen.
- The events grid in Case Master can now be customized to meet user preferences.
- Reminders can now be generated on global timekeeper updates for events.
- Case types can now be associated with case phases to limit phases to particular cases.
- Phases and phase descriptions can now be modified and the timekeeper's office has been added to the work group grids for cases and events.
- All grids within Case Master screens can be sorted with persistence.
- You now have the ability to remove events from Outlook when a case is closed via Calendar Connect for Outlook (aka ECOP).



Grids within the Case Master screen can be sorted with preference.

MANAGE YOUR OFFICE FROM ANYWHERE

WEBVIEW 5.4

Elite WebView offers an intuitive, integrated environment with the convenience of a Web-based platform. WebView maximizes user flexibility and convenience by providing immediate access to important financial and practice management data anytime, anywhere. With an intuitive, integrated environment, you can access critical business data stored within Elite solutions from any location with an Internet connection. Its thin client design speeds deployment and ensures easy maintenance, and its built-in design tools allow it to be truly tailored to the way a business works.

Some enhancements in 5.4 mirror those in Enterprise 3.9, and others were added based on your suggestions.

SET UPS

- On the Client Detail Page, you now have the ability to specify which UDFs should not be displayed and which UDFs cannot be edited.
- There is now a separate sort option for frequent client dropdowns.

The screenshot displays the 'Time Entry' web application. At the top, there are navigation tabs for 'This month', 'This week', 'This week (grid)', 'Direct Time Entry', and 'My Shorthand'. Below these are 'Calendar' and 'Today' tabs. The main header shows 'Calendar Month View : Pati Goettel'. There are several input fields for 'Matter', 'Client', and 'Timekeeper'. A 'Go' button is present. A warning message is displayed in a yellow box: 'Un-finalized timecard(s) exists in:Mar 2010, Apr 2010' and 'Unassigned timecard(s) exists in:Mar 2010'. Below the warning, there are buttons for 'Finalize All', 'Finalize', 'Finalized / Unfinalized View', 'Submit All Suspense', and 'Edit Narratives'. The main area is a calendar for May 2010. The 19th of May has a time entry of 2.25 hours. A summary table on the right shows: Totals: Billable 2.25, Nonbillable 0.00, Total 2.25, Finalized 0.00, Unfinalized 2.25, Total 2.25.

No longer do users have to toggle between months when entering time to make sure all time has been entered for prior months. Warning messages for unfinalized and/or unassigned time are displayed on the Time Entry Calendar.

INQUIRY

- You can now specify the default start period on timekeeper statistics pages 121115 and 101107 using a new vbOption `wv_start_statsperiod`. This allows you to control when WebView will default these pages to the current month.
- Some clients of a firm can have hundreds of pages of invoices. For this reason, a date range has now been provided that allows the user to limit the data retrieved.

TIME ENTRY

- Warning messages have been added to the Time Entry calendar.
- Users needed an easy way to determine if they have "open" time in other months, other than manually navigating to each month to check. You now have the ability to display warning message(s) for unfinalized and/or unassigned time on the Time Entry Calendar.
- You can now set column widths for some fields on the Timecard List page. For example, previously a very long matter description pushed all other fields to the right when printing the list, creating the need to manually change your printer settings.
- You can now name, save, and retrieve commonly used Time Entry reports. This improves on earlier versions of WebView in which the Time Entry report only allows one set of criteria to be saved.

PROFORMAS

- Users can now bill by exact amount or proportional feature to WebView for fees as well as costs on both single and joint Proformas.
- A feature long popular with Enterprise users, in which users can now bill an exact value of time or costs and then leave the remaining time in the WIP for billing next month, is now available in WebView.
- There is now improved navigation back to the Proforma List page(s). Previously, when a proforma was accessed from the proforma list pages, the user was taken to the proforma modification page when they were done editing. Now you will not be returned to the Generate Proforma page, but back to the page from which you came.

EXPEDITE SEARCHES WITH MORE OPTIONS

Proforma Edit - Single Proforma

Main Page | Fee Summary | Cost Summary | Excluded Timecards | Print Options | Trust Accounts | Amend Details | Fee Detail | Cost Detail | Excluded Costs | Finished

Proforma Modification : Ramco- Simple Matter

Last Modified By : elitesvc, 5/20/2010 Billing Initials 5555 Invoice History Proforma Notes

Client Name Ramco- Simple Client Billing Timekeeper Suresh, kothapally

Billing Address Ramco- Simple Client Bill Period Period to: 5/20/2010

Chennai Currency USD

Matter Number 1234-204 Matter Name 1234-204 Matter Contact

Related Matter 8880-001 Status : C : Current Unfinalized Hours Exist

Description Ramco- Simple Matter Instructions Proforma Number : 3958

Narrative

Bill through Fees Auto Include Auto Exclude

	Original	Amended	Presentation	Excluded	Held	Write Up/ (Down)
Fees	106.95	138.55	CREATE	0.00	30.00	31.60
Costs	125.00	150.00	0.00	0.00	220.00	25.00
Total Tax	0.00	0.00				
Total (excl Mark-up)	231.95	288.55	0.00			

Realization

Current Proforma	129.55
Life to Date	107.53

Exact Amount Unallocated Payments Available Apply

CREATE CREATE 0.00 0.00

CREATE Retainer 0.00 0.00

Unfinalized time can now be left in WIP for billing in the following month.

Invoice History

Client Name BEST WESTERN INTERNATIONAL Period 1/1/2000 to 5/20/2010

Matter Description GENERAL SINGLE MATTER Invoice Range 1/1/2000 to 5/20/2010

Matter Number 1000-001 Reverse date order

Type	Description	Invoice	Date	Fees	Costs	Other	Total
BILL	BILL	12113	7/9/2001	6,881.31	329.83	0.00	7,211.14
GRAND TOTAL	GRAND TOTAL			6,881.31	329.83	0.00	7,211.14

RECORDS

- People often type detailed descriptions in the narrative to allow them to find an item in cases with many folders, inserts and/or documents. You now have the ability to search on folder, insert, and document narrative fields.

CONCLUSION

Elite Enterprise and WebView offer the powerful and flexible functionality your company needs to compete and stay ahead of the new demands and changing market dynamics. Using these industry-leading solutions, firms can easily provide applications that match users' job functions and work styles and tailor each environment to fully meet their needs.

To learn more about the latest release of Elite Enterprise and Elite WebView, or for a global list of office locations, visit elite.com

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