

101 REASONS TO UPGRADE FROM ENTERPRISE TO 3E



3E is the only enterprise-level legal management platform available today that has been completely rebuilt from the ground up using the latest industry standard technologies, incorporating functionality and process methodologies designed for today's law firms. Unhindered by legacy technology and architecture, 3E represents a better return on investment and the only long term solution for law firms.

FRAMEWORK & TECHNOLOGY

The highly configurable platform of 3E provides a variety of built-in capabilities including workflow, collaboration, reporting, security, hierarchies, image attachments, multi-currency and multi-language support. These tools, in combination with the 3E services architecture, offer several key advantages: the entire solution has one consistent look and feel, shares a common set of services, and provides a highly scalable foundation. The result is a reliable, stable and consistent solution that helps firms respond to client needs and adapt to changing business and technology requirements.

FRAMEWORK & TECHNOLOGY		
ENTERPRISE	ELITE 3E	WHY IT MATTERS
No Standard Workflow	Workflow and Collaboration	Automated workflows and ad hoc collaboration capabilities are built into the system so users can share information at critical junctures and ensure compliance with management directives.
Attachments Supported via Third-Party Imaging for specific modules	Native Attachments Support—across various processes	Allows users to attach a variety of file types to help support values in the system. Can also be used as part of a workflow and later attached to output such as invoices.
No Equivalent	IDE: Integrated Development Environment	Extremely flexible design tools allow firms to create their own firm-specific applications within 3E and push them out to everyone. For example, a conference room scheduling application.
No Equivalent	IDE: Creating Custom Applications	Powerful customizations via the IDE, creating a custom application can be done literally in minutes, complex applications with workflow in a few hours.
Excel Data Access – requires firm IT work to connect to Elite db. Security is n/a.	Built-in Excel add-in	Provides direct access w/3E security in place. Allows easier, faster and secure access to 3E all the while enforcing 3E security.
Client-server Application.	Full Suite Web Application	Allows much easier remote access from any web browser (assuming access to firm portal). Using the latest industry standard technologies, and build on Microsoft.Net
Security: Data restrictions handled by individual application w/possibility of gaps in security.	Security – Handled at the database layer, process, data and row levels	Allows centralized security management that leaves no gaps in individual applications within 3E and prevents users from accessing secured data by using third party tools.
Security: Data restrictions handled by individual application w/possibility of gaps in security.	User Roles	Ability to create roles, and assign rights, processes, and controls to those roles. Allows for security to be set for groups of users vs. individual users.
Security: Data restrictions handled by individual application w/possibility of gaps in security.	Security cannot be bypassed with 3rd party tools	Restricts sensitive data to appropriate users.
User Defined Fields for specific modules	Custom fields can be added directly to the desired archetype.	Allows firms much more control over custom fields by placing them exactly where they need to be. IDE: used for additional custom fields.

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Load Files – flat and require specific formatting and IT assistance to run the load	Load files – typically Excel files and can be loaded using drag/drop	Allows much easier data manipulation within a familiar Excel interface. Processing the load is literally dropping a file in a directory.
No Ability to Universally Update Labels	Universal Ability to Update Labels	It is much easier in 3E to change the labels universally. For example, if the firm uses the term “attorney” rather than “timekeeper,” a simple find and replace in the message files updates the term timekeeper to attorney.
More Clicking	Less Clicking	All forms in 3E are contained on one page. For example, all matter data is contained on one form. With Enterprise you have to click through a series of tabs to enter information. With 3E you open one record and enter data. This provides for faster data entry, thus improving firm productivity.
External Workflow	Built in Workflow	Records can be easily routed between users using the built in workflow options in 3E.
Difficult to Customize	Built in "Toolkit" for Customizations	Enables firms to become more agile in responding to client needs
Standard tree view	Dashboards can include processes, reports, URL's graphs etc.	Firms can design dashboards to match the individual roles within the firm.
Difficult to Customize	Next Generation Platform	Highly customizable and includes sophisticated reporting and metrics capabilities
No Equivalent	Elite's new Elite Services Bus (ESB), leveraging Microsoft BizTalk Server 2006 technology. Supports Web services architecture.	This capability makes systems integration easier by eliminating the need for firms to create customized code for integration Provides customized management extensions to integrate diverse business applications and increase efficiency.
No Equivalent	Notification Task Manager	Coordinates scheduling and notification information for all scheduled tasks. Common scheduled tasks would include metrics (month end metrics), email notifications and processes such as yearend process.
No Equivalent	Elite's new Elite Services Bus (ESB), leveraging Microsoft BizTalk Server 2006 technology. Supports Web services architecture.	Integration automation features include, schedules integration processes. Provides bi-directional updates. Graphically maps data to be updated and converts files to XML and delivers via Web Services
Summaries Run End of Day	Summary Tables Update in Near Real Time	Summary data for reporting is up to date within minutes of the detail.
No Equivalent	Native Effective Dated Records	Allows for point in time reporting and ability for transactions to utilize the latest data available.
No Equivalent	Functionality and Process Methodologies designed for Today's Law Firms	Represents a better return on investment and the only long term solution for law firms. Ability to easily incorporate new processes and procedures.
No Equivalent	Integrated Application	Includes multiple applications: general ledger (GL), accounts payable (AP), time and billing, and marketing capabilities. Flexible enough for both single currency single location firms, through global multi-unit, multi-currency firms

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Transactions Records – edits directly to the transaction	Transaction Edits – reverse the original transaction and re-books new postings	Clear audit trail of the history of the transaction.
3rd Party Program	Collections Module	Provides a single interface for firms to review past due invoices, and supervise procedures used to recover the associated amounts. Users have immediate access to billing and financial information as well as real time report data.
3rd Party Program	Collections Module	Ability to design collection process based on clients, matters, and individual firm preferences. Tracks collection invoices in multiple ways including: By invoice, by client, matter, by payor, by billing group billing address
3rd Party Program	Collections Module	Ability to design customized workflow for collection process based on clients, matters, and individual firm preferences. Firms can specify when the collection process begins and ends, from point of invoice date or due date.

PRACTICE MANAGEMENT

Automate your practice operations with powerful and flexible conflicts search capabilities and integrated records, case and calendar management. 3E Practice Management offers a variety of applications, including calendaring and docketing, conflicts searching and new business intake, and comprehensive records management that simplify workflow, maximize your business, and improve customer service. As part of the 3E application, Practice Management is fully integrated with the 3E Financial Management System.

PRACTICE MANAGEMENT		
ENTERPRISE	ELITE 3E	WHY IT MATTERS
Records: File retention review and disposition is hardcopy and manual.	Records: File retention and disposition is fully automated.	Reviews, monitoring, approval, escalation, disposition and disposition monitoring are all done on-line within one application.
Conflicts: Hard-copy report generation and distribution	Electronic Results Routing	Allows users to route results (full result set) or selected results electronically for approvals and/or to gather feedback w/o having to generate a report, or report generation is at the discretion of the reviewer.
Conflicts: Phonetic search logic applied to entire search	Conflicts: Phonetic search logic applied to desired names in search	Allows user to target search functionality to specific names and not have tens or hundreds of unwanted phonetic results on other names.
Conflicts: Risk flags for related parties	Conflicts: Risk flags for all entities associated with clients and matters	Risk flag designations are much more comprehensive as the whole entity record is considered rather than a narrow subset. Risk calculations are more comprehensive and more accurate.
Records, overall: No DMS integration.	Records: DMS integration for the entire application suite w/ specific retention capabilities available in Records	Allows users to attach DMS files to any 3E record for any desired purpose. Allows DMS files to be declared as official records to 3E Records for purposes of firm retention and disposition policies.
Records: Retention and disposition at folder level.	Retention and disposition at desired configured level of file hierarchy	Allows firms to dispose of individual inserts/sub files/ documents without having to dispose of the parent file/folder.
Records: Manual file creation requests or workflow required.	Built-in New File Creation Requests	Allows users to submit new file requests directly through the 3E interface using native 3E workflow.
Records: Label printing to laser printers requires third party software.	Records: Label printing to laser printers is standard functionality	Allows firms to use existing printers to print 3E Records barcode labels w/o having to invest in additional software.
Records: Separate inventory files for different types of inventories.	Records: Different types of inventories can be performed at the same time using the same file	Allows more efficient operations by allowing staff to continue working rather than stopping, uploading and processes each inventory file separately.
Calendar: Cases created separately from matters.	Calendar: Cases auto-created when matter created	Allows users to avoid seemingly redundant data entry and more efficient operations.
Single Entity Model – enforced in Conflicts	Singled Entity Model – enforced application-wide	Allows much better control of data and duplicate entity avoidance.
New Business Intake required a 3rd Party Product	New Business Intake Built in	Standard out of the box new business intake workflows that are easy to configure based on the needs of the firm.
Fixed Records Hierarchy	Flexible Records Hierarchy	Allows the firm to define how records are stored to fit their needs. For example you can add the idea of a Pallet with holds boxes. Better reflects the reality of physical storage systems.
Records: Limited configurable options for individual users or offices	Configuration Options : Available for firm, office, role and user	Allows functionality and behavior to be tailored to how individual offices, users and groups of users actually work.
Calendar: One-way Integration with MS Outlook	Full two-way Integration with MS Outlook	Events and tasks can be updated, moved and created directly in Outlook w/o having to notify a 3E user to make the change.

INVOICE MANAGEMENT

Streamline, standardize and automate billing operations to increase revenues and profitability. With 3E Invoice Management, large law firms can improve billing accuracy and increase client satisfaction. Gain accurate and efficient billing processes, eliminate bottlenecks, improve invoicing efficiency and reduce billing cycles.

INVOICE MANAGEMENT		
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Proforma Edit – modifications permanent immediately	Proforma Edit – modifications stored in a draft until proforma is billed	Maintains the integrity of the original records, free from changes, until records are billed.
Timecard table only	Timecardpending / Timecard	Allows users to add a timecard fast without specifying all required fields. Activity housed in separate tables for easier tracking.
No Timecard Templates (Models)	Time Card Models	Easy for the user to create a model out of any timecard. Allows user to create pre-populated timecards for those things they do most often.
No Charge Category	Charges – allows for recording entries other than Cost and Time	Easily able to identify the root nature of transactions which are not directly Fees or Costs. (For example in UK you cannot mingle the 2 together) and also allowing for Miscellaneous Invoices that do not include Costs or Time.
Not Comparable to All Options in 3E	Timekeeper Rates	Flexible, Multi-currency, easy to update and configurable by multiple dimensions, including office, title, rate class, department or section.
Not Comparable to All Options in 3E	Reference Rates	Ability to track a separate rate from the Matter Rate for analytical purposes. For example: The Matter rate includes a discount, and the reference rate would be the matter rate without the discount.
No Equivalent	Multi-Layer Billing	Ability to have very detailed structure on how client bills should be generated and paid. The payor responsibility can be clearly identified.
No Equivalent	Improved Billing and Expense Management	Better WIP management and reporting capabilities.
No Equivalent	Effective Dated Time and Cost Rates	Allows for the rate to adjust, without changing the rate set up, based on the changes of the elements of timekeeper, matter, client or rate.
Time and Cost Transactions – stored in two rates, worked and billed	Time and Cost Transactions – recorded in up to five rates, Work, WIP, Standard, Reference and Billed Rate (BillRate) is also recorded in the TimeBill table when the transaction is billed.	More detailed reporting allowing profitability to be easily identified. The Billed Rate allows 3E to track any write-ups or write-downs to the transaction made at the Proforma Edit stage.
No Equivalent	Get Rate Logic Utility	Allows users to identify which rate was or would be used in various transaction scenarios.
No Equivalent	Entities	Allows you to define and track relationships between various people and organizations. This is important for Conflict searches.
No Equivalent	Entities	One central process that tracks information about people and organizations. Allows re-use of common person and organization data in different parts of the application.

INVOICE MANAGEMENT		
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Effective Dating – used beginning or end of accounting period	Effective Dating by Day	Point in time reporting and capturing more accurate transaction data.
Narrative is 100 lines of 48 characters of Text	Rich Text (RTF) Narrative, Single Formatted Field with Expanded Character Capability	Allows the use of fonts, highlighting, bold, etc. It is also easier to access and report on in a single field.
Batches for Invoice Management Transactions	No Batches	Allows item level linking between the transaction items and the GL. Ability to see the change in transaction immediately, rather than wait for the batch run to occur.
One Proforma Open for a Matter	Allows multiple Proformas open on a matter	Can start the Proforma run for the next month even if there is work to do on Proforma from a prior month.
Narrative Field Only	Internal Comments	Allows timekeepers to enter notes that can be viewed by internal people only, e.g., Billing Timekeeper, Biller. Also the internal comments for time/cost/charges can appear on proforma but not on bills.
Single Unassigned Matter – created by Administrative personnel that is used as a "template" by all users in WebView Time Entry	Effective Time Capture System	Unlimited unassigned (temporary) matters in Time Capture. Allows timekeepers to capture time for work in process before the "true" matter is opened.
Billable/Non-Billable Activity – requires transfer process	Non-Billable Activity	Ability to add non-billable records to billable matters, and billable records to non-billable matters. This allows for additional flexibility in how a firm can add time/cost/charges to their matters.
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ACCOUNTS PAYABLE

Increase cash flow and profitability with Elite 3E Accounts Payable, a highly scalable solution equipped with workflow and collaboration tools unmatched in the industry. Accounts Payable can enable your firm to gain better visibility into and control over the entire accounts payable process.

ACCOUNTS PAYABLE		
ENTERPRISE	ELITE 3E	WHY IT MATTERS
Vendors Only	Vendors with Payees	Supports the reality of having multiple occurrences of a single Vendor. For example, Staples is the Vendor but each location can be set up as a Payee.
Fixed Terms Codes	Tiered Terms Code	Set up's very flexible, can include cut off dates, discounts, exact, dates etc.
No Equivalent	Stored Payment Selection Set Up	Payment selection criteria can be stored to be re-used in subsequent payment runs.
CSD Table	Cash Journal	Single source of posting of all cash activity makes Bank Reconciliation easier and increased data integrity
No Equivalent	Display Unavailable Vouchers	In payment selection, able to see the reason why a specific voucher was not gathered for payment.
No Equivalent	Purchasing Fully Integrated with Accounts Payable Module	Allows for flow of data from one module to another. Save time by automating the creation of vouchers from a purchase orders Eliminates additional data entry. Covers the full purchase to pay lifecycle.
No Equivalent	Workflow Authorizations	With the integration of 3E Purchasing, reduce your costs by controlling your spending.
No Equivalent	Matching Options	Ability to define matching between purchase order and voucher or purchase order, receipt and voucher to enable payment, and ensure product/service delivery.

GENERAL LEDGER

Increase profitability with powerful and flexible transaction management and processing capabilities. Elite 3E General Ledger enables firms to quickly access critical transaction and reporting information needed to make timely and informed business decisions.

GENERAL LEDGER		
ENTERPRISE	ELITE 3E	WHY IT MATTERS
From 3.7 Some Parallel Posting Available	Native 'Parallel Posting' and Additional posting	Allows a single transaction to post to multiple sets of books, following separate sets of business rules
Only one account – problem in countries like France that have to report them separately	Realized/Unrealized can define different accounts for Gain and Loss separately	Required in France, but also allows Financial Analysts to easily identify Realized vs. Unrealized account postings.
Batch Processing to GL	Control Scheduling of Posting to GL	Able to control how often various types of transactions post to various posting sources.
No Virtual Year Ends	Virtual year ends with reporting units	Allowing business units to track activity in a different fiscal calendars and currencies
No Control Account Identification	Control Accounts	Prevents users from posting journal entries to certain accounts, and ensures all data in those accounts was system generated.
Entry ID Auto-Assigned	Name General Journal Entries	Usable names and descriptions make retrieving general journals easier.
Revaluation of GL Accounts – part of EGR set-up's not base product	Revaluation of GL Accounts – in base design of product	Users can easily revalue any GL Account to capture currency gain/losses, through a simple set up, and revaluation posting produce automatically.
Batch posting	Subledgers and Controlled Postings	Ability to control postings of each type of transaction, whether posting is open or closed, and how often the Journal Manager will look for each type of transaction.
Query GJ Tables	GL Inquiry – Visual traceability of reversed transactions	Posting and reversals are easily auditable.

GLOBAL FEATURES

As part of the powerful 3E integrated development environment, Global Components provides firms with advanced international capabilities, including precise currency exchange, multiple general ledger accounting functionality, tax requirement assistance for each jurisdiction, and support for local, regional and global reporting.

MULTI-CURRENCY/GLOBAL		
ENTERPRISE	ELITE 3E	WHY IT MATTERS
Few Language Options	Several Flexible Language Options	Allows firms to not only have labels presented in different languages, but also individual users and clients as well. For example, if a client requires a bill in an language different than the firm's main language, narrative data can be entered in the client's language and the bill printed in that same language.
No Equivalent as it uses current rate – It can be an issue when tax rate changed	Credit Note and Reversals – using the historical tax code/tax and tax rate	Ability to remain in compliance with tax jurisdiction requirements.
Tax Reporting – not as robust and Reverse Charge does not exist; no direct GL traceability/reconciliation	Tax Reporting – taxes clearly reported as Input/output and Reverse Charges	Helps in reconciling tax liability with GL
Taxes – can only define the corresponding of 2 3E taxes per tax code	Taxes – unlimited number of Taxes attached to one Tax Code	For complex tax on tax or multi-tiered taxes in general.
IOB – Inter-Office Billing	ICB – Intercompany Billing	Allows multi-unit firms to generate inter-company invoices billing each unit for inter-unit activities.
No Equivalent	Partial Recoverable Taxes	Ability to recover only the "recoverable" portion of a tax, without being forced to recover entire amount and create a general journal entry to add tax liability back for percentage that should not have been recovered.
No Equivalent	Tax Clearing	Easy to identify which tax transactions have been reported to the tax authority.
No Equivalent	Tax Journal	All tax liability information stored in a single table location within the application.
From 3.7 Renumbering Option Available	Sequential Numbering	Sequential numbering available throughout application to meet the need of statutory agencies. Seamless and transparent Italian Billing—no renumbering required.
One Currency on a GL Record	Up to Six Currencies on a GL Record	Allows easy reporting in multiple currencies. Saves time and is more efficient.
Only Transaction Currency and Unit Currency	Transaction Currency, Unit Currency and Firm Currency – plus three additional GL currency + tax currency	Allows firms to track transaction activity in their firm or unit currency as well as any statutory reporting currencies.

REPORTING

Enhance performance management firm-wide with 3E Reporting. Turn 3E reports into powerful metrics reporting and inquiry tools to improve the way you view your business operations. Streamline reporting efficiencies with dynamic electronic reporting capabilities. 3E Reporting is integrated with the powerful 3E financial and practice management solution.

REPORTING		
ENTERPRISE	ELITE 3E	WHY IT MATTERS
Reporting: Does not have the ability to add report dimensions.	Reporting: Has the ability to add report dimensions (criteria).	To get more information about "differences" in our data.
Reporting: Does not have the ability to export data into MS Excel.	Reporting: Has the ability export the data in MS Excel directly from a report on a dashboard	To be able to use the capabilities of MX Excel in analyzing the data, such as Pivot tables.
Reporting: Does not have the ability to highlight various report data.	Reporting: Has the ability to highlight various report data and also de-select the highlight.	To be able to point out important data.
Reporting: Had to run two reports	Reporting: Drill Down Capabilities	Ability to drill down into any transaction or account balance to see supporting data.
Central Report Location	Reporting Available in Dashboards	Reports and metrics can be found on the individual dashboards related to the process they support. I.e. Accounts Payable reports on the Accounts Payable dashboard.
No charting	Charting available	Graphically representations of key data available through standard functionality and Business Intelligence Reports.
Trust Reports – Money type restricted to General and Control	Trust Australian Reports – All types of Trust Monies	To adhere to the Trust requirements of Australia, historically known for their strict trust requirements.
No Equivalent	Native Metric Functionality	Business intelligence and analytics to provide insight into business performance, as well as track and report on important client information.
Reporting Required 3rd Party of 4GL	Reporting and Metrics Built In	The reports and metrics "understand" the data relationships in 3E. There is no need to specify joins or data relationships. Easy to use for a financial analyst. Eliminate the need for manual analysis.
Reporting: Does not have the ability to refresh report date while in view.	Reporting: Has the ability to refresh report data while in the report view.	To get the most up-to-date information without having to leave the report. Can also include the comparison of results sets across periods.

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