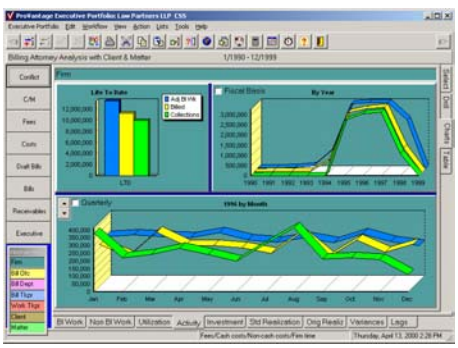
Solutions

Business Intelligence

PROVANTAGE®
Financial Management • Business Intelligence

Executive Portfolio

Executive Portfolio™ EIS System is the central application in the ProVantage® Business Intelligence Suite. Executive Portfolio is a powerful graphical data mining and analysis tool used by senior managers and partners to analyze their firm's key financial and business performance data. Using a customizable multi-dimensional data mart, Executive Portfolio extracts and summarizes data stored in your accounting system into user-defined views.



Instant access to accurate financial performance information is critical for effective practice management and development. Executive Portfolio (EP) employs a customizable data mart to create multi-dimensional views of the information captured during time & cost accounting and client billing, which is managed within your current accounting system.
Once created, these portfolios can be viewed using the drill-down, charting and table views to:

- Analyze the performance of the entire firm by over 80 dimensions, including office, practice area, area of law, timekeeper, client or matter. This can help you evaluate the contribution of practice groups, departments, and individuals.

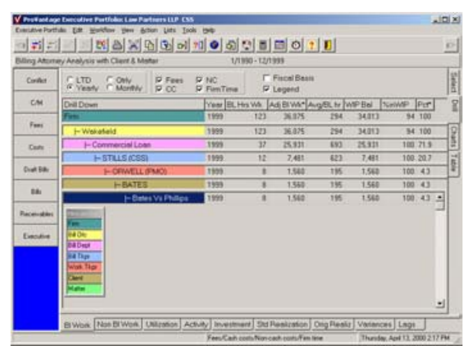
- Graphically display key business indicators such as utilization, activity, and the value of billable work to improve firm management and profitability.

- Monitor critical success factors such as realization, billing and payment lags, variances, and write-offs to improve cash-flow management.

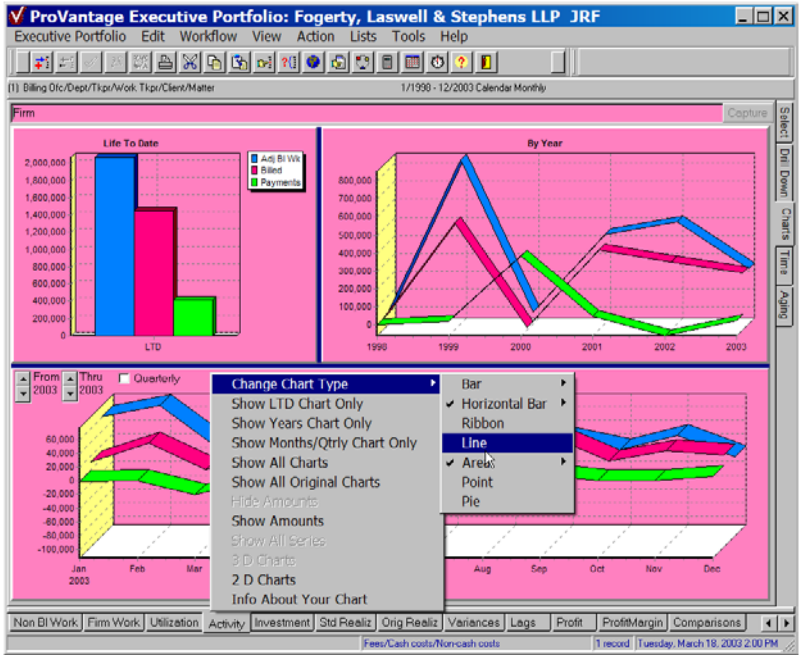
Portfolio Selection

Executive Portfolio provides a wide variety of customizable views or portfolios of client/matter and financial information to suit the unique reporting needs of individuals or groups within the firm such as the executive committee, equity partners, office or practice group managers and billing attorneys.

A standard set of portfolios are provided with EP. Additional portfolios can be created with the Wellspring™ Designer application, also included with the ProVantage Business Intelligence Suite.



The initial Executive Portfolio screen lists all of the available portfolios together with their description and the date the portfolio was created/updated. Double-clicking on a portfolio begins the drill-down process and reveals extra tabs for selecting the data values, charts and table values.



Executive Portfolio™ provides extensive, customizable chart and table views of client and financial data summarized from the billing and accounting information managed within your current accounting system.

At all times, the hierarchy legend and the context headings indicate your position in the portfolio hierarchy.

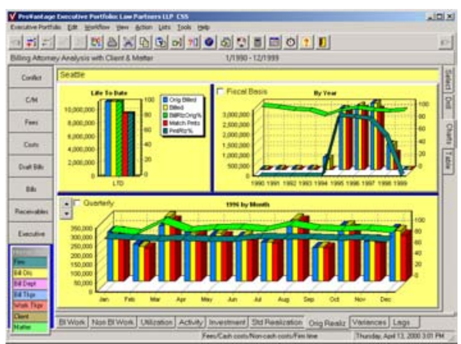
Portfolio Charts

At any level of the portfolio hierarchy, the Charts tab can be selected to graphically display financial analysis information. The type of information presented is defined by the data series tabs located immediately below the chart area.

Portfolio values may be filtered using the radio and check boxes at the top of the Drill-down, Chart and Table views. Values may be shown for:

- Life-to-date
- Yearly
- Quarterly
- Monthly
- Fees
- Cash costs
- Non-cash costs
- Firm time

Values can be shown on a calendar or fiscal basis.



Individual chart menus are available to select different chart types and to include or exclude specific values or data series from the chart.

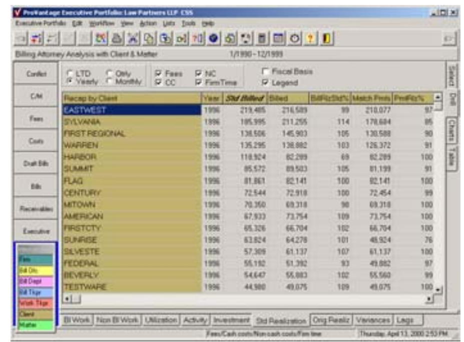
Portfolio Values

Portfolio values are the summarized or calculated values available within the selected portfolio.

Examples of these value tabs are:

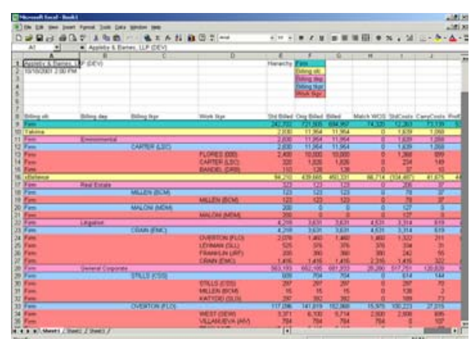
- Billable work
- Non billable work
- Utilization
- Activity
- Investment
- Realization
- Variances
- Billing and payment lags
- Profitability
- Comparisons

These values are available at each level of the portfolio hierarchy.



Focal Point™ Reportwriter

Data from the EP tables can be transferred directly to Microsoft® Excel with Focal Point, also included in the BI Suite. Transferred files instantly appear in Excel; no need to search for them. Focal Point users enjoy full Excel functionality and features.



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