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CaseWare has long been a mainstay in large legal practices and the top 100 accounting firms in the country, offering a suite of professional applications focused on time and billing, engagement management, financial analysis, audit applications, benchmarking tools and advanced database engine tools. CaseWare's Time program houses the time and billing capabilities, providing time and expense tracking with advanced staff productivity and contact and project management functions. The system also offers integration with the other CaseWare systems, accounting programs and office productivity applications, including Microsoft Outlook..

Basic System Functions

CaseWare Time opens into an intuitive main screen that offers customizable components and access to primary system modules such as time entry and reporting, but with users only able to see and use the functions to which they have been granted access rights. The interface is centered around a large work area that is accompanied by expandable panel menus for task groups, including setup functions and the Processing area, where most day-to-day work is accessed. The screen also offers toolbars, traditional pull-down menus, an icon bar, and features for looking up data by clients, documents, staff members, projects and dates.

The system is workflow based, with completion percentages, due-dates, milestones and WIPs easily accessible via reporting or from a dashboard view called the Status Panel, which offers quick summaries of data, including current and YTD account balances, performance indicators and drilldown access to data. The program is designed for legal and accounting practices, since these two professions share similar workflow and engagement flows, with good client and management functions. It can support any number of users and is often found in firms with hundreds of staff.

4.5

Time Management Capabilities

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addition to offering progress-based billing.

Contact and client management functions allow for tracking of multiple contacts per client, with the ability to create marketing and form letters that can be filtered to specific clients. With the addition of the CaseWare Today module, Time can also integrate with Microsoft Outlook for contact management, calendaring and tasking, with data synched between the systems. The program does not offer built-in HR and staff management features. 3.75

Invoicing Functions

Expenses can be tracked and entered into client engagements as easily as time data, with the spreadsheet screen providing pull-down menus for selecting clients, expense categories, projects and other data. Work in progress is tracked live as data is entered, with percentage complete and project-related status available through reporting or the dashboard for staff with appropriate access rights. Likewise, the system can track budget-from-estimate and can be used to bill by progress.

Billing features offer flexible options for managing multiple projects per client and for write-ups and write-downs, as well as for tracking non-billed hours. The program's receivables management functions include client credit limits, alerts and summary views of aging accounts. The system does not specifically offer purchase order management, but the workflow processes can be used to develop a suitable method. Client invoices are completely customizable via a built-in report writer. 4.5

Management Features

The Status Panel serves as the primary dashboard screen, offering customizable data views based on access rights, which can be based on the user's role within the firm, workgroups, office locations or client teams to which they are assigned. For managers, the data can include timesheet overviews and signoff/approval processes,

productivity analysis, performance tracking and project status, plus current and

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Integration & Data Management

Reports, client letters and other documents can be exported to Excel, Word, PDF or html formats, plus invoices and letters can be sent to clients via email, with batch emailing also available. Electronic payment acceptance functions are not available. The program offers integration with Microsoft Outlook for contact management and calendaring functions. It also integrates with CaseWare's other professional systems, including paperless document management and analysis, and can output data into Excel format, which can be mapped and imported into trial balance and other accounting systems. It does not offer direct integration with third-party payroll, HR or accounting applications. A Time Websheet is available for remote entry of time and expense data. 4.25

Help/Support

Time provides very strong built-in support features, including the Workflow Guides, context-sensitive assistance, help index and links to documentation. CaseWare's support website adds a little to this, with articles, program updates and "QuickVid" tutorials, but is lacking FAQs or a knowledgebase, and users would benefit from an online forum. Furthermore, the CaseWare website only supports IE and Safari browsers. Updates must be installed manually. CaseWare likely prefers email-based support since it makes finding phone numbers challenging, but technical support is included in pricing. 4.25

Summary & Pricing

Time is a comprehensive practice management system with features for tracking time and expenses, invoicing, contact management, project management and productivity analysis for multi-departmental firms. The system supports GAAP and IFRS

standards, with pricing starting at $999 for a five-user license. The system is best

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