Curriculum

The following is the most current ProLaw Summit at VANTAGE 2018 curriculum (updated on May 17, 2018). New sessions will be added over the next few weeks. Be sure to bookmark this web page and revisit for the most current schedule.

VANTAGE sessions qualify for CPE credit.

Sessions are listed as follows:

- VANTAGE Showcase
- ProLaw

Schedule grid:

A quick reference schedule grid is located after the sessions list. Jump to the schedule grid »

VANTAGE SHOWCASE

THURSDAY, JUNE 21, 2018

10:45 am – 11:45 am

Elite Unplugged!

Presented by Joseph A Samarco, Director of Revenue Accounting Operations, Drinker Biddle & Reath LLP, Eric Ruud, Elisabet Hardy, Eric Sugden, and Patrick Hurley

You want answers? We’ve heard you loud and clear that you want to hear unrehearsed and “non-corporate speak” answers to your lingering questions or concerns. Please join Joseph Samarco with Drinker Biddle & Reath as he puts the Elite executive team on the “hot seat” and facilitates what will hopefully be an unrehearsed and thought-provoking conversation with Elite’s Executive Management team. Joseph has pledged that he will put the Executive Management team to the task and will not let them dodge any of his questions! This session is bound to be lively and interesting as we explore everything from Elite’s strategy to tactical initiatives that help shape the future of law firms and Thomson Reuters Elite products.

ASTOR BALLROOM (7th FL)
1:00 pm – 2:00 pm

Simple and Easy Receivables  
Presented by Ryan Beck, Rob Beisswenger, Russ Haskin, ClientPay

Does your firm write-off a high percentage of your billable hours? Is your Accounts Receivable process inefficient? Do you worry about the security of your payment acceptance? Join ClientPay, the #1 payment technology for the Am Law 400, and learn best practices and industry trends in credit card and electronic payment acceptance. BONUS: session attendees will have the chance to win a $100 Visa gift card!

HARLEM (7th FL)

1:45 pm – 3:45 pm

ProLaw Reports Workshop – Beginning to Intermediate Report Writing  
Presented by Austin Gabaldon

This two-hour workshop is designed to guide you through the process of making changes to default SSRS report formats as well as create new SSRS reports in ProLaw. This session will provide hands-on practice navigating ProLaw's SSRS report viewer and design mode. Attendees will learn how to make basic formatting changes such as font and color changes, modifying alignment and margins, and customizing and deploying headers and footers. This session will also cover how to add custom fields and new datasets to reports.

TUTORIAL

O’NEILL (4th FL)

Back Office Round Table  
Presented by Gina Lague, Randall Miles, Lisa Piccuta

Come join other Back Office users to share your best practices and burning questions.

TUTORIAL

ODETS (4th FL)

ProLaw Reports Workshop - Modifying Statement Formats  
Presented by Kyle Johnson

This two-hour workshop is designed to guide you through the process of altering ProLaw's default statement format. This workshop will use beginning to intermediate skills in SSRS and SQL. This session will provide hands-on practice editing statement formats and adding custom fields, adjusting visibility properties, creating different headers for first and subsequent pages, and more.

TUTORIAL

ZIEGFELD (4th FL)

Technical Round Table  
Presented by Brian Clay and Joey Kramer

Come join other technical users to share your best practices and burning questions.

TUTORIAL

WILDER (4th FL)

4:00 pm – 6:00 pm

ProLaw Reports Workshop – Beginning to Intermediate Report Writing  
Presented by Austin Gabaldon

This two-hour workshop is designed to guide you through the process of making changes to default SSRS report formats as well as create new SSRS reports in ProLaw. This session will provide hands-on practice navigating ProLaw's SSRS report viewer and design mode. Attendees will learn how to make basic formatting changes such as font and color changes, modifying alignment and margins, and customizing and deploying headers and footers. This session will also cover how to add custom fields and new datasets to reports.

TUTORIAL

O’NEILL (4th FL)

ProLaw Reports Workshop – Advanced Report Writing  
Presented by Kyle Johnson

This two-hour workshop is designed for advanced SSRS report creators who want to explore what the report builder has to offer outside of ProLaw’s default options. This session will provide hands-on practice creating functional and powerful reports from scratch. You will learn how to use the Lookup and Lookupset expressions, create reports to export out as multiple tabs in Excel, use a matrix, add charts, create page breaks and custom parameters, and more.

TUTORIAL

ZIEGFELD (4th FL)

Front Office Round Table  
Presented by Diane Flynn and Debie Radcliff

Come join other Front Office users to share your best practices and burning questions.

TUTORIAL

ODETS (4th FL)

Support Round Table  
Presented by Julian Cortez, Gina Lague, and Rick Roy

Come meet the ProLaw Support Management team and participate in a lively discussion regarding entering support incidents and when to contact the ProLaw Support team.

TUTORIAL

WILDER (4th FL)
WEDNESDAY, JUNE 20, 2018

11:00 am – 12:00 pm

What's New in ProLaw 2017.2/2018.1
Presented by Ken Bassham
Join us as we review the features that have been added in the latest releases such as the new Matters View, Custom tab security, and Journals import.
O'NEILL (4th FL)

Using the ProLaw Dashboard to Better Utilize Your Workflow
Presented by Debie Radcliff
This class will enhance your use and application of the ProLaw Dashboard, with tips and tricks to improve workflow. You will also get a deeper look into the Management windows.
ZIEGFELD (4th FL)

Custom v11 Reports: What to Consider When Updating to .NET
Presented by Lisa Piccuta
In this class, we will discuss how to identify and analyze which v11 custom reports/statements/electronic bill formats need to be rebuilt in your .Net version of ProLaw using Microsoft Reporting Services. We will cover how to analyze existing custom reports at a high level, and prioritize the reports that are critical to your business. We will review the tools you can use now, in v11 and in .Net versions of ProLaw. Additionally, we'll cover what to expect when working with ProLaw for custom design work.
ZIEGFELD (4th FL)

Understanding ProLaw Supported Technologies and System Requirements
Presented by Joey Kramer
This session will cover the basic explanations of ProLaw supported technologies, including system requirements. We will discuss why these requirements are needed, and will help you better understand these technologies for your firm's setup. With this knowledge in hand, we will also go over how to best organize your firm's ProLaw Environment (e.g., customizations, SQL/Server specs, Triggers, and reports).
ODETS (4th FL)

International Payments and Check Elimination – Continuous Innovation of the Payment Process!
Presented by Alex Amoriello, Global Exchange
This session focuses on enhancing the global accounts payable and billing processes for professional services firms. From direct invoice processing with seamless Elite integration for international payments – to eliminating 100% of the manual check process. Experience the DifferenceSM that Global Exchange & Comdata has to offer.
HARLEM (7th FL)

2:00 pm – 3:00 pm

ProLaw's Paperless Proforma (Pre-Bill Editing)
Presented by Courtney Markham
The new Paperless Proforma feature enables firms to edit proformas (Pre-bills) from anywhere using functionality built into the ProLaw Portal. Come learn how to do Pre-bill edits with this advanced feature.
O'NEILL (4th FL)

The ABCs of Document Assembly
Presented by Debie Radcliff
Learn how to make customized forms using ProLaw's document assembly functions via the ProLaw application or .NET Pro Filing. Additionally, you will gain an understanding of the different field and formatting options in ProLaw's document assembly interface for both Word and Adobe PDF files.
ZIEGFELD (4th FL)

Best Practices for Successfully Updating Your ProLaw .NET Version
Presented by Andres Ranieri
Learn about what goes into updating .NET ProLaw to a higher version, starting with ProLaw 2014.1 and later releases. You will discover the scheduling, testing, and updating processes involved. We will also discuss the possible pitfalls and best practices for a successful update.
ODETS (4th FL)

ProLaw Reports – Beginning to Intermediate Report Writing
Presented by Austin Gabaldon
A beginning guide to customizing SSRS report formats as well as creating new SSRS reports in ProLaw. Time will be spent navigating ProLaw's new SSRS report viewer and design mode. Attendees will learn how to make basic formatting changes such as font and color changes, modifying alignment and margins, and customizing and deploying headers and footers. This session will also cover how to add custom fields and new datasets to reports.
WILDER (4th FL)
How the Cloud Can Simplify Your Administration, Security and Spending  
Presented by Ronny Loew, ProCirrus Technologies  
This session will discuss how your firm can leverage cloud technology to provide your firm much greater access and productivity while improving its overall security AND lowering its costs and risks.  
BARRYMORE (9th FL)

Implementing the ProLaw Suite  
Presented by Maurice Williams and Cynde Carley  
Come and learn about the new functionality within the ProLaw Portal, Pro Filing, and the newly rewritten Matters View (formerly known as Outlook View).  
O'NEILL (4th FL)

Can ProLaw’s Compensation Formulas Save You Time?  
Presented by Sharon Winston  
Still managing your compensation in Excel spreadsheets? ProLaw can be set up so that your compensation plan is administered automatically. The fee income postings for cash receipts can be automatically split up based on origination, transaction professionals, etc. See if your firm can take advantage of this functionality.  
ZIEGFELD (4th FL)

ProLaw: Events Off the Dashboard  
Presented by Dianne Flynn  
Did you know that Events Off the Dashboard can be used to create, access, preview, search and version documents, as well as change the professionals assigned to an event, complete dockets and e-mail events? This course will review the basics of this underutilized tool.  
ODETS (4th FL)

ProLaw: 3rd Party Integration Overview  
Presented by Bobby Fisher  
This session is designed to go over the most popular integrations used by our clients, technical requirements, and basic functionality. Additional topics include Exchange integration with the GroupWare Agent and an overview of other supported integrations such as document management options.  
WILDER (4th FL)

Cloud Technology and How Elite Is Leveraging It  
Presented by Ruby Lee, Lisa Brown, Mark Gendein, Marc Solomon, and Darren Baldwin  
This session will cover basic cloud concepts and technologies. Additionally, it will highlight and demo Elite products using this technology such as 3E, 3E Financial Reporting, and 3E Workspace.  
EMPIRE & HUDSON (7th FL)

Xcelerate Financial Reporting and Budgeting & Forecasting for ProLaw  
Presented by Josh Kanakaratnam, OLAP Vision  
Come see what the buzz is all about – the successful Xcelerate solution is now available for Prolaw clients! Come see why Xcelerate is one of the best-selling solutions for law firms and how Xcelerate provides even deeper insights into your firm’s most important metrics. Drill down to details in real-time with Financial Reporting and learn how Budgeting & Forecasting can help your firm protect profits with real-time budget insight and skyrocketing efficiency and accuracy. Come hear customer case studies and exciting announcements.  
O'NEILL (4th FL)

Best Practices for ProLaw’s Custom Tabs  
Presented by Dianne Flynn  
Learn how to develop your own ProLaw input screens by following the ‘Five Steps to Good Custom Tab Design’. In this popular session, you will be given the tools you need to determine what information you should track, how to design a user-friendly interface, and how to create custom tabs in ProLaw. We will also cover our new custom tabs Item Level Security setup. As your requirements change over time, learn how you can redesign custom tabs to meet your organization’s current business needs and growing sophistication.  
ZIEGFELD (4th FL)
ProLaw’s Best Practices for Accounts Payable – Writing Checks  
**Presented by Rachel Fischbach-Saiz**  
General overview of creating check entries in ProLaw, including recurring journal entries, void versus spoiled, and manual checks. This session will also include a review of journal preferences settings and a discussion of general best practices.  
ODETS (4th FL)

Understanding ProLaw’s Full Text Indexing  
**Presented by Danielle Marty**  
Learn everything needed to get full text indexing working for you. We will discuss setup for those who are new to full text indexing, review how often to refresh and rebuild the index, how to improve and expand your full text searches, simple troubleshooting, and common problems associated with searches and indexing. We will also share best practices for your document store when using full text indexing.  
WILDER (4th FL)

**THURSDAY, JUNE 21, 2018**

8:00 am – 9:00 am

**Questions and Answers With ProLaw Product Management**  
**Presented by Maurice Williams and Cynde Carley**  
Join the Product Management team for a lively discussion addressing your ProLaw questions.  
O’NEILL (4th FL)

**Could Your Organization Benefit from a ProLaw Business Process Review?**  
**Presented by Brian Clay**  
How long has it been since you or your organization reviewed what they are doing in ProLaw and, more importantly, why they are doing it that way? Take some time with us to discuss the best ways you can look to improve ProLaw business processes at your organization, ways to make those changes, and how we can help if needed.  
ODETS (4th FL)

**eBillingHub - What’s New and Product Roadmap**  
**Presented by Greg Nilsen and Jake Hershey**  
A look at the short and long-term roadmap plans for eBillingHub as we continue work on key enhancements to the product.  
MARQUIS A (9th FL)

9:30 am – 10:30 am

**My Favorite ProLaw Features – Back Office**  
**Presented by Julian Cortez**  
Join us as we review some of our favorite ProLaw features.  
O’NEILL (4th FL)

**Understanding ProLaw’s Queries**  
**Presented by Kyle Johnson**  
Back by popular demand! Join one of our query subject matter experts in unlocking the mysteries of queries. Please bring your query questions for this lively discussion.  
ODETS (4th FL)

**ProLaw SSRS – Creating E-bills in SSRS**  
**Presented by Austin Gabaldon**  
Take your report design to the next level by learning how to create e-bill formats in ProLaw 2017.2. Also explore the out-of-the-box defaults for LEDES 1998B, LEDES 2000, Litigation Advisor, and TyMetrix.  
ZIEGFELD (4th FL)

**ProLaw Remote Access – Technical Discussion**  
**Presented by Bobby Fisher**  
Remote access to ProLaw is important in staying connected with your clients and internal workflow. In this session we will explore the technical requirements for the different solutions to accessing ProLaw data and time entry from your mobile devices and laptops. Topics covered are centered around ProLaw Mobility, Portal, and Matter View.  
WILDER (4th FL)
One Hub to Manage All of Your e-Billing Needs (Yes, Really)

Presented by Greg Nilsen and Jerid Dupier

E-billing is supposed to make invoicing easier, but many different spend management systems, and widely varying requirements, have actually made the process more labor intensive and time consuming without closing the margin for error. If this sounds all too familiar, this is the session for you. The integration between 3E and eBillingHub takes the invoicing experience to a whole new level by reducing labor, e-billing rejection rates, write-downs, and write-offs. If you are ready to take e-billing head on, come learn how to make the right investment that is proven to pay for itself – and fast! For those already using eBillingHub, this session also looks at the latest enhancements underway and exciting updates on the horizon.

ASTOR BALLROOM (7th FL)

10:45 am – 11:45 am

Elite Unplugged!

Presented by Joseph A Samarco, Director of Revenue Accounting Operations, Drinker Biddle & Reath LLP, Eric Ruud, Elisabet Hardy, Eric Sugden, and Patrick Hurley

You want answers? We've heard you loud and clear that you want to hear unrehearsed and "non-corporate speak" answers to your lingering questions or concerns. Please join Joseph Samarco with Drinker Biddle & Reath as he puts the Elite executive team on the "hot seat" and facilitates what will hopefully be an unrehearsed and thought-provoking conversation with Elite's Executive Management team. Joseph has pledged that he will put the Executive Management team to the task and will not let them dodge any of his questions! This session is bound to be lively and interesting as we explore everything from Elite's strategy to tactical initiatives that help shape the future of law firms and Thomson Reuters Elite products.

ASTOR BALLROOM (7th FL)

ProLaw Reports - Modifying Statement Formats

Presented by Courtney Markham

This session will review the process of customizing ProLaw's default statement format. We will explore how to add custom fields, adjust visibility properties, create different headers for first and subsequent pages, and more.

ZIEGFELD (4th FL)

Setting Up Pleading Indexes in ProLaw

Presented by Sharon Winston

Do you use Pleading Indexes? Learn how ProLaw can help you with the set up of Pleading Index Type and Pleading Index Status, designing of Pleading Index forms (document types), developing and running Pleading Index queries in Events Off the Dashboard, and Printing a Pleading Index.

ODETS (4th FL)

It's Your Knowledge Base 24/7

Presented by Dan Wesol

If accessing, navigating and searching the Elite Knowledge Base has sometimes been a mystery to you, then the information in this session will help you unravel the solutions you're looking for in the Knowledge Base. Find out how subscribing to KB articles can keep you current and informed about changes and best practices to your software solutions. A step-by-step approach is used to help users become familiar with accessing the Knowledge Base, using a handful of search tips, and searching for specific content. The Knowledge Base options covered include: tabs, navigation tree, categories, subcategories, the All Words search, filtering results by “HTML” articles only, and the Advanced Search with Article title only.

DUFFY (7th FL)
eBillingHub User Group
Presented by Christine Smith, Jessi Danaher, and Paula Montgomery
Join an open discussion between eBillingHub users, service managers, support, and operations about best practices, implementations, and more.
COLUMBIA (7th FL)

1:45 pm – 2:45 pm

Your Organization's ProLaw Training: How to Engage Your Organization
Presented by Sandra Haislet, Warner Angle Hallam Jackson & Formanek, PLC
Be the drive your organization needs to become actively engaged (and invested) in the practice and management of your firm with ProLaw. Join this empowering and engaging client-centric session in which ProLaw clients will get to hear and share their organization's successes and pitfalls - and discover new tips and solutions in the process.
COLUMBIA (7th FL)

ProLaw Reports – Advanced Report Writing
Presented by Kyle Johnson
This session provides an advanced course for report creators who are looking to explore what the report builder has to offer outside of ProLaw’s default options. Learn how to use Lookup and Lookupset expressions, create reports to export out as multiple tabs in Excel, use a matrix, create page break parameters, and add charts to your reports.
O’NEILL (4th FL)

Xcelerate Extended – Get More from Your Investment
Presented by Ameet Kamat and Honda Ngo, OLAP Vision
Dive deeper with Xcelerate and maximize your return on investment. Learn about how Xcelerate extends well beyond budgeting, forecasting and reporting. See the latest version in action, deeper integrations with Elite products and cutting-edge Microsoft solutions such as Power BI. Case studies for more business use cases for Xcelerate and how to seamlessly connect Xcelerate with your firm’s various systems.
ODETS (4th FL)

3:00 pm – 4:00 pm

ProLaw’s Enhanced Technical Project Discussion
Presented by Joey Kramer
This session is a combination of a few classes that we have offered in the past. We will cover the data requirements for a major upgrade, discuss complicated consulting service projects, and present suggestions our technical staff have for clients. These will focus on maintaining and optimizing the technical side of your ProLaw installation.
O’NEILL (4th FL)

Reviewing ProLaw Preferences – Front Office
Presented by Dianne Flynn
When was the last time you reviewed your system setup? This session will take you through preferences for Front Office.
ZIEGFELD (4th FL)

Reviewing ProLaw Preferences – Back Office
Presented by Gina Lague
When was the last time you reviewed your system setup? This session will take you through preferences for Back Office.
ZIEGFELD (4th FL)

Supporting Remote ProLaw Users
Presented by Bobby Fisher
Whether you have a whole office in a different state or just one person on the road, you need remote solutions to give your users all the tools they need regardless of their location. From Replication to the Portal to VPN to Terminal Server/Citrix, we will cover the options so you can make the right decisions for your remote users.
WILDER (4th FL)
ProLaw Anywhere, From Any Device  
**Presented by Doug Hafford, Afinety**

Experience the full features and functionality of ProLaw from anywhere, using any device, and save on traditional overhead costs. The ProLaw Cloud Platform can be as simple as a ProLaw icon on your desktop or as complete as your entire network in the cloud. Join us as we discuss the following: 5 primary advantages and benefits of running ProLaw in the cloud; ethical considerations; security and security audits; where to start: Key questions to ask and steps involved to move to the cloud; a brief ProLaw in the cloud demo. Afinety is a long-time fully certified ProLaw Partner and offers fully certified professionals on staff. Since 1986, Afinety has provided the finest quality IT services to the legal community.

ODETS (4th FL)

How to Make Time Tracking Efficient in ProLaw  
**Presented by Rachel Fischbach-Saiz**

This class assists many different ProLaw users in their quest to efficiently enter time with many different ProLaw compatible tools such as the ProLaw Portal, Pro Filing, Mobility, the ProLaw Dashboard, and don't forget Transactions.

WILDER (4th FL)
### TUESDAY, JUNE 19, 2018

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<td><strong>VANTAGE Expo Reception</strong></td>
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### WEDNESDAY, JUNE 20, 2018

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<td>THURSDAY, JUNE 21, 2018</td>
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<td>eBillingHub - What's New and Product Roadmap</td>
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<td>ASTOR BALLROOM (7th FL)</td>
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<tr>
<td>Time</td>
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<tr>
<td>10:45 am</td>
<td>VANTAGE Showcase / ProLaw</td>
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<tr>
<td>11:45 am</td>
<td>Elite Unplugged!</td>
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<td>My Favorite ProLaw Features – Front Office</td>
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<td>ProLaw Reports - Setting Up Pleading Indexes in ProLaw</td>
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<tr>
<td>11:45 am</td>
<td>ProLaw Remote Access – End User Functionality</td>
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<td>It’s Your Knowledge Base 24/7</td>
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<td>ProLaw Reports – Writing</td>
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<tr>
<td>12:30 pm</td>
<td>Lunch</td>
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<td>12:30 pm</td>
<td>VANTAGE Expo Closing</td>
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<td>1:45 pm</td>
<td>Your Organization’s ProLaw Training: How to Engage Your Organization</td>
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<td>2:45 pm</td>
<td>Reviewing ProLaw Preferences – Back Office</td>
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<td>ProLaw Reports – Advanced Report Writing</td>
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<td>3:00 pm</td>
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<td>ProLaw Anywhere, From Any Device</td>
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<td>How to Make Time Tracking Efficient in ProLaw</td>
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<td>6:30 pm</td>
<td>VANTAGE Gala Dinner at the Rockefeller Center</td>
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