VANTAGE 2019 Worldwide Conference Schedule
The following is the most current VANTAGE 2019 Worldwide Conference curriculum (updated on **May 23, 2019**). 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 listed by topics can be found after the schedule grid. Click on the links below to jump to:

**VANTAGE Showcase** • **General Interests** • **eBillingHub** • **Tech** • **3E** • **Enterprise** • **Enterprise to 3E**

* indicates client participation sessions.

## Session Schedule Grid

(Mouse over session titles to see details)

### Monday, June 17, 2019

Today's opening hours: **Registration** 10:00 am – 5:00 pm • **Learning Zone** 12:00 pm – 5:00 pm • **VANTAGE Welcome Reception** 5:15 pm – 7:00 pm

<table>
<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>1:00 pm – 3:00 pm</td>
<td>3E Multi-Currency – How Does It Really Work? Tutorial</td>
<td>3E Bank Reconciliation Considerations and Reports Tutorial</td>
<td>Auto-Matching – Demystifying Full Bank Reconciliation Tutorial</td>
<td>Show and Tell: Self-Service Reporting Using 3E Dashboard... Tutorial</td>
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<td>Pacific Ballroom 14</td>
<td>Pacific Ballroom 15</td>
<td>Pacific Ballroom 16</td>
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<td><strong>Enterprise to 3E</strong></td>
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<tr>
<td></td>
<td>Interim Billing in Enterprise Tutorial</td>
<td>Framework Tools and Screen Customizations in Enterprise Tutorial</td>
<td>Progressing to 3E: Implementation Readiness Services Overview Tutorial</td>
<td>Keys to a Successful 3E Implementation Tutorial</td>
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<td>Pacific Ballroom 21</td>
<td>Pacific Ballroom 22</td>
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<th>Time</th>
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<tbody>
<tr>
<td>3:15 pm – 5:15 pm</td>
<td>General Interests</td>
<td>eBillingHub</td>
<td>Let's Make a Deal: Rate Exceptions, Adjustments, Flat Fees... Tutorial</td>
<td>The Importance and Impact of Setups on System Balancing Tutorial</td>
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<td>Pacific Ballroom 24</td>
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<td><strong>Enterprise to 3E</strong></td>
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<td>Feature Comparative: Advanced Billing Arrangements Tutorial</td>
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### TUESDAY, JUNE 18, 2019

Today's opening hours: **Registration** 7:30 am – 5:00 pm • **Learning Zone** 9:30 am – 5:00 pm • **Expo Hall Hours** 9:30 am – 5:00 pm • **Expo Reception** 5:15 pm – 7:00 pm

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>8:00 am</td>
<td>Breakfast</td>
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<td>Marriott Grand Ballroom 1 - 9</td>
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<tr>
<td>8:45 am</td>
<td>Keynote</td>
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<tr>
<td>9:30 am</td>
<td>Product Vision Keynote</td>
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<td></td>
<td>Marriott Grand Ballroom 1 - 9</td>
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<tr>
<td>10:00 am</td>
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<td>10:00 am</td>
<td>General Interests</td>
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<td>10:00 am</td>
<td>3E Billing Journey</td>
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<td>3E Data Insights – Data Analytics Made Easy</td>
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<td>3E Lawyer Journey</td>
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<td>VANTAGE Showcase / 3E</td>
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<td>3E Copy</td>
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<td>11:00 am</td>
<td>Cloning your 3E DB</td>
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<td>Working with 3E MatterSphere</td>
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<td>12:00 pm</td>
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<td>1:30 pm</td>
<td>3E / Enterprise to 3E</td>
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<tr>
<td>1:30 pm</td>
<td>Anticipated Disbursements and Why Most Firms Should Avoid Them</td>
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<tr>
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<td>Other Uses for 3E Roles</td>
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<td>1:30 pm</td>
<td>3E Templates: All Its Many Parts</td>
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<td>Technical Comparative: Product System Requirements</td>
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<td>1:30 pm</td>
<td>WebView: Basic Time Entry Tips &amp; Tricks (Part I)</td>
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<td>1:30 pm</td>
<td>3E Does It Better: GL</td>
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<tr>
<td>1:30 pm</td>
<td>Technical Comparative: Product System Requirements</td>
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<tr>
<td>3:00 pm</td>
<td>General Interests</td>
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<td>4:00 pm</td>
<td>Right Off the Blocks: Using Data from the Start of Client Engagement...</td>
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<td>3:00 pm</td>
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<td>4:00 pm</td>
<td>Discover the Power of Monitoring &amp; Diagnostics</td>
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<td>4:00 pm</td>
<td>All About Volume Discounts</td>
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<td>3:00 pm</td>
<td>Enterprise to 3E</td>
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<tr>
<td>4:00 pm</td>
<td>VANTAGE Showcase / General Interests</td>
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<tr>
<td>3:00 pm</td>
<td>Panoramic Customer Panel: The Legal Transformation Agenda</td>
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<tr>
<td>4:00 pm</td>
<td>Implementation Challenges in a Climate of Scarce Resources</td>
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<td>3:00 pm</td>
<td>Enterprise to 3E</td>
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<tr>
<td>4:00 pm</td>
<td>Progressing to 3E: Understanding the Legacy Data Review</td>
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<td>3:00 pm</td>
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<td>4:00 pm</td>
<td>Feature Comparative: Framework</td>
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**5:15 pm | 7:00 pm**

**VANTAGE Expo Hall Reception**
Marriott Grand Ballroom Prefunction
### Wednesday, June 19, 2019

Today’s opening hours: **Registration** 8:00 am – 5:00 pm • **Learning Zone** 8:00 am – 5:00 pm • **Expo Hall Hours** 8:00 am – 5:00 pm

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<tr>
<th>Time</th>
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<td>8:00 am</td>
<td><strong>Breakfast</strong></td>
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<td>8:45 am</td>
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<td>9:00 am – 10:30 am</td>
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<td></td>
<td>- The Innovation Agenda: Adopt and Profit <strong>TUTORIAL</strong></td>
<td>- New 3E API <strong>TUTORIAL</strong></td>
<td>- Paying the Bills: How 3E Deals with Accounts Payable, from... <strong>TUTORIAL</strong></td>
<td>- Customization Migration for Beginners <strong>TUTORIAL</strong></td>
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<td>San Diego Ballroom A</td>
<td>San Diego Ballroom C</td>
<td>Marriott Grand Ballroom 10</td>
<td>Marriott Grand Ballroom 11</td>
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<td>- 3E Basic IDE <strong>TUTORIAL</strong></td>
<td>- 3E Basic Report Design <strong>TUTORIAL</strong></td>
<td>- Enterprise Data Mining Tips &amp; Tricks <strong>TUTORIAL</strong></td>
<td>- Enterprise Billing and APGL 3.11 and Post GA Enhancements <strong>TUTORIAL</strong></td>
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<td>- Enterprise to 3E</td>
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<td>Feature Comparative: Multi-currency <strong>TUTORIAL</strong></td>
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<td>Pacific Ballroom 18</td>
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<td>11:00 am – 12:00 pm</td>
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<td></td>
<td>- All About Enterprise and Your Path Toward the Future</td>
<td>- Optimizing Financial Performance for Lawyers</td>
<td>- The Future of Legal BI</td>
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<td>- 3E</td>
<td><strong>3E</strong></td>
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<td>- Who Created All These Tables? Streamlining your 3E Metrics</td>
<td>- Tax Does Not Have to Be Taxing</td>
<td>- 3E Billing and GL Metrics Insights</td>
<td>- 3E Templates Integration &amp; Troubleshooting Explained</td>
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<td>Marriott Grand Ballroom 12</td>
<td>San Diego Ballroom A</td>
<td>Pacific Ballroom 15</td>
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<td>- <strong>3E</strong></td>
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<td>- 3E 1099s: New Process for 2019</td>
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<td>Pacific Ballroom 22</td>
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<td>12:00 pm – 12:45 pm</td>
<td><strong>Lunch</strong></td>
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<td>12:45 pm – 1:30 pm</td>
<td><strong>Guest Keynote</strong></td>
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<td>VANTAGE Showcase / 3E</td>
<td>General Interests / Enterprise to 3E</td>
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<tr>
<td>1:45 pm - 2:45 pm</td>
<td>3E Profitability Modernized with Cost to Serve and Data Insights</td>
<td>3E in the Cloud</td>
<td>Lessons Learned: How to Get the Most from 3E with Pinnacle’s...</td>
<td>Workspace - New UI Demo and Technology</td>
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<td>San Diego Ballroom A</td>
<td>San Diego Ballroom B</td>
<td>Pacific Ballroom 15</td>
<td>Pacific Ballroom 16</td>
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<tr>
<td>3:15 pm - 4:45 pm</td>
<td>Troubleshooting 3E Security – My Friends Can Do It, So Why...</td>
<td>Time and Cost Auditing</td>
<td>Customizing 3E Workspace</td>
<td>Recipes for Success: How to Maximize Your Firm’s Chances of a...</td>
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<td>Marriott Grand Ballroom 11</td>
<td>Marriott Grand Ballroom 12</td>
<td>San Diego Ballroom C</td>
<td>Marriott Grand Ballroom 10</td>
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<td>Extend Best Practices and 3.11 Enhancements Review</td>
<td>Making the Transition to 3E Accounts Payable</td>
<td>Peer Perspective: Rightsizing a 3E Implementation at a Mid-Size Firm</td>
<td>Feature Comparative: Paperless Proforma</td>
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<td>Pacific Ballroom 22</td>
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<td>3E</td>
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<td>3E / Enterprise to 3E</td>
<td>Enterprise to 3E</td>
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<tr>
<td>3:15 pm - 4:45 pm</td>
<td>Why Microsoft Power BI and Data Insights is a Winner</td>
<td>3E Templates: Template Development in a Nutshell</td>
<td>3E Administration, Performance, and Troubleshooting</td>
<td>Help me Understand My 3E Setups – Masking, GL Types, GL...</td>
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<td>San Diego Ballroom C</td>
<td>Pacific Ballroom 16</td>
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<td>Pacific Ballroom 22</td>
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<td>Enterprise</td>
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<td>3:15 pm - 4:45 pm</td>
<td>The 3E in the Cloud Experience</td>
<td>Using Enterprise VB Design and Framework Tools for...</td>
<td>Feature Comparative: Billing Rates</td>
<td>Progressing to 3E: Data Migration De-mysified</td>
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<td>San Diego Ballroom B</td>
<td>San Diego Ballroom A</td>
<td>Pacific Ballroom 18</td>
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### Thursday, June 20, 2019

**Today's opening hours:**
- **Registration:** 8:00 am – 3:00 pm
- **Learning Zone:** 8:00 am – 3:00 pm
- **Expo Hall Hours:** 8:45 am – 3:15 pm
- **Gala Dinner:** 6:30 pm – 10:00 pm

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Room/Location</th>
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<tbody>
<tr>
<td>8:00 am</td>
<td>Breakfast</td>
<td>Marriott Grand Ballroom 1 - 9</td>
</tr>
<tr>
<td>8:45 am</td>
<td>VANTAGE Showcase / 3E</td>
<td>General Interests</td>
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<tr>
<td>8:45 am</td>
<td>3E Product Roadmap</td>
<td>San Diego Ballroom B</td>
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<td>8:45 am</td>
<td>Collaboration: Demanded by Large Law Clients, Enhanced by Technology</td>
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<tr>
<td>9:45 am</td>
<td>Enterprise</td>
<td>Enterprise Interests</td>
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<td>Using SQL for Basic Troubleshooting in Enterprise</td>
<td>3E Implementations - Hindsight is 20/20 and Insights Are Golden...</td>
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<tr>
<td>9:45 am</td>
<td>3E Technology Roadmap</td>
<td>San Diego Ballroom B</td>
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<td>eBillingHub</td>
<td>3E</td>
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<td>Introducing the eBillingHub API Platform</td>
<td>Security in 3E</td>
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<td>3E</td>
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<td>Simplifying Time Entry</td>
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<td>Enterprise to 3E</td>
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<td>10:15 am</td>
<td>Feature Comparative: General Ledger and Reporting</td>
<td>Progressing to 3E: How to Prepare Your Firm for a Successful...</td>
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<td>3E</td>
<td>Pacific Ballroom 21</td>
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<td>VANTAGE Showcase / eBillingHub</td>
<td>3E</td>
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<td>11:30 am</td>
<td>eBillingHub Product Roadmap</td>
<td>3E Inter-company Billing</td>
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<td>3E</td>
<td>MatterSphere Developer Productivity</td>
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<td>11:30 am</td>
<td>3E User Interface Refresh: Technology &amp; Architecture</td>
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<tr>
<td>12:30 pm</td>
<td>Lunch</td>
<td>Marriott Grand Ballroom 1 - 9</td>
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<tr>
<td>12:30 pm</td>
<td>Data Privacy in Enterprise</td>
<td>Innovative Ideas to Managing New Client/Matter Intake and Managing...</td>
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<td>3E</td>
<td>Feature Comparative: UDFs</td>
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<tr>
<td>1:30 pm</td>
<td>Working with Your Lawyers to Improve Profitability with Panoramic</td>
<td>Peer Perspective: Our Enterprise to 3E Conversion Experience</td>
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<td>Framework Under the Hood</td>
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<td>San Diego Ballroom A</td>
<td>Marriott Grand Ballroom 11</td>
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<td>3:15 pm</td>
<td>3E / Enterprise to 3E</td>
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<td>Explore our Project Quality Model</td>
<td>Enterprise Billing Rates</td>
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<td>Enterprise to 3E</td>
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SESSIONS LISTED BY TOPICS

VANTAGE SHOWCASE

TUESDAY, JUNE 18, 2019

10:00 am – 10:45 am

**3E Billing Journey**
Presented by Justin Farmer, Jill Schornack, and Jeff Caudill, Gallagher, Evelius & Jones
Join us at this session to experience the billing journey within 3E's new user interface from generating proformas to validating client guidelines to adhering to AFA arrangements to approval, submission and monitoring. Over the past years, we've focused heavily on building enhancements and product integrations that reduce the billing cycle. See for yourself how we've made the billing process faster to bill and increased compliance within the new cohesive interface.

SAN DIEGO BALLROOM B

11:00 am – 12:00 pm

**Spend to Save: Tech Epiphany in the Mid-Market**
Moderated by Jerid Dupier, Todd Golden, Neal Gerber & Eisenberg, Jeff Caudill, Gallagher, Evelius & Jones, and Chris Lamb, Howard & Howard
On average mid-size law firms' technology spend is growing over 5% annually, but their overall expenses are increasing less than 2% per year. How are MLFs keeping expense increases growing less than inflation? By investing in technology to help them run leaner and smarter. Mid-size law firms can actually enjoy more immediate impact of technology investments because they can adopt new technology faster and easier than their larger counterparts. Learn which investments are making the most impact at mid-size firms today.

PACIFIC BALLROOM 18

**3E Data Insights – Data Analytics Made Easy**
Presented by Lisa Brown
See how the powerful combination of Data Insights, Microsoft Power BI and the 3E Data Warehouse Console offers more efficient ways for decision-makers to absorb and act on data. Our approach to deliver standard supported analytics and visualizations out of the box provides the fundamental elements to streamline implementation and deliver reports and dashboards faster. In addition to delivering standard reporting content, 3E Data Insights is a self-service data analytics solution that enables users to produce their own analytics and impactful visualizations without the help of IT. Seeing is believing. The product development roadmap will also be presented.

SAN DIEGO BALLROOM A

**3E Lawyer Journey**
Presented by Justin Farmer and Jill Schornack
See 3E's new user interface and learn how lawyers and law firm managers work within the new experience. You'll see "day in the life" demonstrations for how a fee earner enters/reviews time and sees their WIP, how a practice group lead manages through persona-based dashboards, and how a partner analyzing billing and profitability.

SAN DIEGO BALLROOM B

4:15 pm – 5:15 pm

**Panoramic Customer Panel: The Legal Transformation Agenda**
Moderated by Gia Norris, Chris Lange and Erik Gustafson, both of LeClairRyan
Hear from your peers on how they are working through their various transformation projects, including their take on law firm needs, their participation and influence in Panoramic’s customer partnership program, and how, together, we have reimagined how lawyers do their work.

SAN DIEGO BALLROOM A
**WEDNESDAY, JUNE 19, 2019**

11:00 am – 12:00 pm

All About Enterprise and Your Path Toward the Future

Presented by Elisabet Hardy, Patrick Hurley, and Marty Brej

Enterprise users, don't miss this session! Learn about what Thomson Reuters has been working on to support Enterprise clients including the latest enhancements since the launch of version 3.11. The session will begin with a general update, including recent bug fixes, GDPR considerations, progression timelines, and what’s up next on the horizon. The conversation will then cover options for upgrading or planning a move—to ProLaw, 3E, or even 3E in the Cloud—including software and service options that simplify the transition process. You will also hear from clients that recently made the move from Enterprise to 3E.

PACIFIC BALLROOM 21

1:45 pm – 2:45 pm

3E Profitability Modernized with Cost to Serve and Data Insights

Presented by Lisa Brown, Paul Odette, and Josh Kanakaratnam

Learn how the all-new 3E Profitability enables your partners and firm leadership with more insights to help with key decisions for how to profitably manage and grow clients, matters, practices, and the firm. Beginner

SAN DIEGO BALLROOM A

3E in the Cloud

Presented by Jerid Dupier, Ruby Lee, and Mark Gendein

This session will outline the fundamental aspects of 3E in the Cloud with an overview of the offering including cloud security. We will provide an update on our Cloud progress and customer implementations to date. Finally we will outline our vision for the future of 3E in the Cloud with a review of the roadmap and its potential impact for all customers. Intermediate

SAN DIEGO BALLROOM B

**THURSDAY, JUNE 20, 2019**

8:45 am – 9:45 am

3E Product Roadmap

Presented by Jerid Dupier, Paul Odette, and Ruby Lee

Learn about the future direction for the core 3E business applications including 3E Data Insights, 3E Templates, lawyer-facing tools, and more! Intermediate

SAN DIEGO BALLROOM B

11:30 am – 12:30 pm

eBillingHub Product Roadmap

Presented by Greg Nilsen

Join us for a look at the short and long-term product roadmap plans and key enhancements for eBillingHub. All

SAN DIEGO BALLROOM A

**GENERAL INTERESTS**

**MONDAY, JUNE 17, 2019**

3:15 pm – 5:15 pm

Adapt or Die: Disruption, Innovation and the Future of Law Firms

Presented by Simon Jarrett, Jennifer Sanders, Quinn Emanuel, and Mark Peterson, Reed Smith

The traditional law firm is ill-equipped for a future where technological advancement, an increasingly informed, tech-savvy client base, a new crop of millennial law graduates, and the emergence of non-traditional market entrants are disrupting the old ways of doing law. Simon Jarrett discusses the future of law firms in the 21st century, looking more closely at what firms can do now to ensure that they not only survive, but adapt and thrive in a brave new world of AI, automation, in-house legal services and new client demands. We look at how Thomson Reuters can help your firm differentiate itself from the competition and adapt to this new legal environment. All **TUTORIAL**

ＰＡＣＩＦＩＣ BALLROOM 25
10:00 am – 10:45 am

Learn it – Answer it using the Knowledge Base
Presented by Dan Wesol

Improve your ability and/or your team’s ability to find answers to your software questions using the Knowledge Base. In this session you’ll learn to navigate and search the Knowledge Base more effectively – helping you get closer to the answers you’re looking for. Search tips and multiple search options will be demonstrated with search topics requested from the audience. The Knowledge Base features and functions covered include product training videos, the KB’s navigation tree, categories, the All Words search, filtering results by “HTML” articles only, subscribing to KB articles to be the first to know of an update, and the Advanced Search with article title only. How to change access permissions to the KB and other Customer Portal resources by a firm’s Support Key Contact will also be demonstrated. All

PACIFIC BALLROOM 21

Partner Compensation and Accounting
Presented by Maria Gray and Brian Ahart

Partner Compensation and Partner Accounting are new modules that are currently in development. Please join us as we share the insights that have been learned from our research to date. We welcome your feedback and collaboration. Advanced

PACIFIC BALLROOM 22

11:00 am – 12:00 pm

Caution! Empowerment Zone Ahead! Using the Community to Advance Your Voice Within Thomson Reuters
Presented by Debbie Szumylo

Not sure who to ask? Not sure who might be in the know? Do you have a desire to effect change within Thomson Reuters? In this session learn more about an every day resource you have at your fingertips to make your day-to-day run more smoothly, efficiently, and smartly: your very own online Community. Yes, it is better than Facebook! Beginner

PACIFIC BALLROOM 21

1:30 pm – 2:30 pm

Thomson Reuters Panoramic: A Bold New Vision for the Way Lawyers Work
Presented by Jill Schornack and Brian Quinn

Attend this session to learn more about Thomson Reuters Panoramic, an exciting end-to-end legal workflow solution that connects the practice of law with the business of law by pulling together the assets that Thomson Reuters has into one integrated platform in which your lawyers and your law firm professionals can plan, manage and execute legal work.

SAN DIEGO BALLROOM B

Presented by Kim Desmarais

Join Peer Monitor, the legal industry’s leading digital benchmarking platform, to review the detailed financial performance of the market. While 2018 showed positive growth in many areas, the question remains: has 2019 sustained that trend? And what does this mean for the “changing market realities” that are so widely written about? There will be close looks into demand, profits, revenue, practice performance, rates and realization, expenses, and a dissection of how the larger competitive landscape is affecting the global law firm market. All

SAN DIEGO BALLROOM C

The Compliance Conundrum
Presented by Nadia Strobbia

Discover the ongoing and new Thomson Reuters initiatives to help you with the challenges of operating globally, in demanding jurisdictions and ever-changing regulations. This session will also cover highlights of 2019 3E enhancements targeting specific jurisdictional requirements across the world. Intermediate

PACIFIC BALLROOM 21
3:00 pm – 4:00 pm

Right Off the Blocks: Using Data from the Start of Client Engagement to Enhance Pricing and Performance
Presented by Russ Haskin, Wilson Allen

Law firms are under ever-increasing pressure to grow and be profitable. In addition, there is additional pressure to meet client demands and maintain satisfaction. Ensuring you have the right amount of foundational data to do proper business planning and performance measurement is a must for law firms wanting to gain better control and confidence. Attend this session to learn how to leverage your data to manage risk, assess acquisition costs, develop higher margin pricing strategies, and garner the right client feedback to advance the lifetime value for your clients. The benefits of this approach include: • Better insight into the cost and effort of new business • Capturing key attributes at engagement onset • Greater efficiency when modeling engagements • Integration of data throughout core systems • Improved insight into engagement tracking • Data governance throughout the client lifecycle

PACIFIC BALLROOM 15

4:15 pm – 5:15 pm

Panoramic Customer Panel: The Legal Transformation Agenda
Moderated by Gia Norris, Chris Lange and Erik Gustafson, both of LeClairRyan

Hear from your peers on how they are working through their various transformation projects, including their take on law firm needs, their participation and influence in Panoramic’s customer partnership program, and how, together, we have re-imagined how lawyers do their work.

Client Participation

SAN DIEGO BALLROOM A

Implementation Challenges in a Climate of Scarce Resources
Presented by Jane Threlkeld and Avneet Sahni, both of Source Consulting Group

Source has been assisting clients in implementing 3E for 10+ years. This session will talk about some challenges we have seen over multiple projects and ways to help mitigate them. We will also discuss ideas and options for managing a large implementation project with scarce resources.

PACIFIC BALLROOM 15

WEDNESDAY, JUNE 19, 2019

9:00 am – 10:30 am

The Innovation Agenda: Adopt and Profit
Presented by Colleen Scimeca

Hear how firms like yours are working to better align the practice and business of law by developing ever more sophisticated approaches to pricing, legal project management, and data management. What are the challenges and how do you drive adoption and broad acceptance of new technologies and processes?

TUTORIAL

SAN DIEGO BALLROOM A

11:00 am – 12:00 pm

Optimizing Financial Performance for Lawyers
Presented by Kyra Olson and Lisa Brown

View a live demonstration of how lawyers can view financial and profitability insights to manage the financial performance of the firm, practices, clients and matters, and their personal performance. Beginner

SAN DIEGO BALLROOM C

The Future of Legal BI
Presented by Tom Jones, Iridium Technology

2019 is an exciting year for legal BI, with new technologies and products hitting the market. Attend this session to learn about the latest legal BI trends, and how Iridium is updating their product line to continue to provide leading-edge legal BI capabilities.

PACIFIC BALLROOM 16
Lessons Learned: How to Get the Most from 3E with Pinnacle's Global Team of Experts and Their Clients
Presented by Honda Ngo and Jason Whalen, both of Pinnacle

Pinnacle's team knows the Thomson Reuters finance systems inside out, with expertise across conversion, compliance, templates, billing processes and business intelligence. In this interactive session we answer your questions on how you can get the most from your investment in 3E. We also share how we integrate the toolset with Intapp and use it to manage our business. The session will be chaired by one of our clients who uses 3E themselves. If you have a burning issue you'd like our help with please email your question to ask-pinnacle@pinnacle-oa.com. There's a prize for every question we cover in the session.

PACIFIC BALLROOM 15

THURSDAY, JUNE 20, 2019

Collaboration: Demanded by Large Law Clients, Enhanced by Technology
Moderated by Patrick Hurley, Connie Brenton, NetApp, Mat Rosswood, Milbank, and Rob Burger, Sterne, Kessler, Goldstein & Fox

More than ever, clients are demanding better insights into their outside counsel's work to maximize transparency and value. But, more data is not necessarily better insight. What qualitative and quantitative intelligence should law firms surface to keep their clients informed about their ongoing matters and the broader impact to their business? What role should technology play in facilitating this collaboration? Join this session to hear our expert panel break down key elements of this important topic, and discover guiding principles and best practices that are helping firms meet and exceed clients' expectations.

SAN DIEGO BALLROOM A

Partnership Program – Partnering for Success
Presented by Kaye Sycamore and Greg Brown

A strong Partner Ecosystem helps to deliver best in class solutions and support. Having a strong Partner network allows for a better end-user experience by increasing capabilities and decreasing issues. Review the Partner Ecosystem structure, find out how Partners are selected, vetted and approved, and how to find Partners that fit your needs. All

PACIFIC BALLROOM 21

Working with Your Lawyers to Improve Profitability with Panoramic
Presented by Brian Quinn

You may have heard the phrase "Plan the work, and work the plan." Come see how lawyers and pricing professionals can come together to plan, budget, and execute their next matter more profitably. And please feel free to bring any other questions you have about Panoramic to this session.

SAN DIEGO BALLROOM A

Peer Perspective: Our Enterprise to 3E Conversion Experience
Moderated by Val Brady, Steven Knight, Hogan Lovells, Victor Fernandez, Fried Frank, and David Burdick, Rimkus

This panel will discuss their Enterprise to 3E conversion experience. How did they decide on project scope and determine resourcing? What approach to data integrity did they take? What do they feel they did right and what were the challenges they faced? These questions and more will be discussed. Customer-led

SAN DIEGO BALLROOM B

Modernize Your Accounts Receivable Management and Payment Acceptance Processes
Presented by Ryan Beck and Elizabeth Walsh, both of ClientPay

When clients are slow to pay, or worse, don't pay at all, your firm's P&L suffers. This session will discuss ways to modernizing your accounts receivable and payment acceptance processes and implement best practices so you can accelerate your time-to-revenue cycle. Specifically you will learn: o Changes in customer behavior and expectations that affect how your clients pay o Nine best practices for improving your cash flow and modernizing your accounts receivable management and payment acceptance practices o How innovative payment acceptance technology can transform your current processes, making them more efficient and secure Join ClientPay to gain valuable insight into how high-performing firms maximize their revenue. ClientPay, which is fully integrated with Thomson Reuters' ProLaw, 3E, Enterprise and Firm Central offerings to allow for streamlined payment acceptance, is an award-winning payment acceptance solution that helps companies get paid faster and reduce write-offs while eliminating billing errors.

PACIFIC BALLROOM 15
MONDAY, JUNE 17, 2019

3:15 pm – 5:15 pm  
eBillingHub User Group  
Presented by Emilee Roman, Erin Lavery, Jessi Danaher, and Cristina Romualdez  
Join an open discussion between eBillingHub users, service managers, support and operations about best practices, implementations, and more.  

TUTORIAL  
PACIFIC BALLROOM 24

TUESDAY, JUNE 18, 2019

1:30 pm – 2:30 pm  
3E & eBillingHub: What’s New  
Presented by Marti Attanasio and Janis Gaston  
Join us as we discuss what’s new with 3E and eBillingHub as we demonstrate the full end-to-end integration initially available in 2.8.2 and being enhanced further in 2.9.0. We will review initial setup through eBH validation rules and submission process as well as new 2.9.0 features for eBH Invoice Status Management and the 3E eBH Health Check Tracker. Intermediate  

SAN DIEGO BALLROOM A

3:00 pm – 4:00 pm  
Transitioning to 3E with eBillingHub  
Presented by Zachary Rupert and Emilee Roman  
When taking on a project like transitioning from Enterprise to 3E, it’s easy to overlook the potential impact on your e-billing process. Join us as we discuss what the process entails from the eBillingHub perspective, the impact and cost of customizations, and hear testimonials from customers who have already completed the migration. Intermediate  

PACIFIC BALLROOM 19

WEDNESDAY, JUNE 19, 2019

3:15 pm – 4:45 pm  
Making the Most of eBillingHub  
Presented by Emilee Roman and Erin Lavery  
During this tutorial, our experts will show you common mistakes e-billers make, causing delays in e-billing as well as rejections. We will also help you find simple solutions to assist your e-billers to eliminate those mistakes. Intermediate  

TUTORIAL  
PACIFIC BALLROOM 15

THURSDAY, JUNE 20, 2019

10:15 am – 11:15 am  
Introducing the eBillingHub API Platform  
Presented by Greg Nilsen  
The eBillingHub API Platform introduces new tools available to law firms that can be used to bring more insight and functionality to your firm. Explore these new options with us, and what they can help you accomplish. All  

PACIFIC BALLROOM 16

11:30 am – 12:30 pm  
eBillingHub Product Roadmap  
Presented by Greg Nilsen  
Join us for a look at the short and long-term product roadmap plans and key enhancements for eBillingHub. All  

SAN DIEGO BALLROOM A
TUESDAY, JUNE 18, 2019

10:00 am – 10:45 am  
**BizTalk - Demystified**  
Presented by Sandeep Gupta and Mark Piper, Kirland & Ellis  
Come learn about generic and custom BizTalk integrations. Intermediate  
Client Participation  
MARRIOTT GRAND BALLROOM 12

11:00 am – 12:00 pm  
**Cloning your 3E DB**  
Presented by Scott Strachan  
Join us for an in-depth session on the best practices for cloning your 3E database to create another instance of 3E in your environment.  
SAN DIEGO BALLROOM C

4:15 pm – 5:15 pm  
**3E User Interface Refresh: Unifying the Experience Across the 3E Portfolio**  
Presented by Gerry Lattimer and Kyra Olson  
This Product and Technology session will provide an overview and update of the new 3E user interface that will replace Silverlight as the UI framework and experience for 3E. We will demonstrate our progress to-date and explain how the interface is evolving and providing improved capabilities while minimizing impacts on customizations, upgrades, and re-training. The session will also cover user interface update plans for 3E Workspace and Mobile – the lawyer user experience that brings together financial management, proforma, matter management, business development, and more for lawyers – and our plans to unify the experience across products. All  
PACIFIC BALLROOM 16

WEDNESDAY, JUNE 19, 2019

9:00 am – 10:30 am  
**New 3E API**  
Presented by Mithat Mese, Recep Ulgen, and Gerry Lattimer  
This Technology session will provide a deep dive into the new 3E API. We will share our roadmap for the new API and demonstrate how the UI uses the new API endpoints now and how third party integrations will utilize them in the future. Advanced  
SAN DIEGO BALLROOM C

11:00 am – 12:00 pm  
**Build Tool and Developer Workflows**  
Presented by Harun Diri  
Learn how to use the new build tool and automate builds and deployments.  
MARRIOTT GRAND BALLROOM 10

1:45 pm – 2:45 pm  
**Workspace - New UI Demo and Technology**  
Presented by Mithat Mese  
PACIFIC BALLROOM 16

THURSDAY, JUNE 20, 2019

3:15 pm – 4:15 pm  
**Framework Under the Hood**  
Presented by Mithat Mese and Recep Ulgen  
Join us as we walk through the life of a 3E process. We will dig into what happens behind the scenes and give you tips and tricks to develop more 3E applications.  
SAN DIEGO BALLROOM A
MONDAY, JUNE 17, 2019

1:00 pm – 3:00 pm

**3E Multi-Currency – How Does It Really Work?**
Presented by Bill Motter and Simon Jarrett
What's it really worth? Discover how 3E handles your multi-currency financial transactions and ensures that such transactions are correctly valued. This tutorial will walk you through the various 3E setups related to foreign currency processing (including realized / unrealized FX gains and losses), the way FX is “baked into” 3E, and how multi-currency is used in 3E reporting.
Advanced
PACIFIC BALLROOM 14

**3E Bank Reconciliation Considerations and Reports**
Presented by Karen Jakes and Rhonda Compher
This session will cover the Bank Reconciliation process within 3E and its associated tasks. You will learn general tips and tricks for navigation through the process and gain an understanding of the Bank Reports and where the values come from. This session will also cover the concept of the Bank Rec initialization process and discuss considerations that need to be taken by during this process. Intermediate
PACIFIC BALLROOM 15

**Auto-Matching – Demystifying Full Bank Reconciliation**
Presented by Lyndsey Nations and Karen Lewis
Demystifying the Full Bank Reconciliation process, demonstrating the matching rules to suit your firm’s needs for a smooth reconciliation. Highlights include new enhancements from condensed grid view to matching by query. Beginner
PACIFIC BALLROOM 16

**Show and Tell: Self-Service Reporting Using 3E Dashboard Design and Proforma Approval**
Presented by Ahad Shafiq and Randolph Nairn
In this session, we will explore three of the “persona” dashboards offered in 3E, with specific emphasis on “self-service” reporting. You'll get a demo of the Working Timekeeper dashboard, Billing Timekeeper dashboard and Management Committee dashboard and the associated setups and configurations that control what data each dashboard will display to the end user. We will also review the proforma approval workflow. Beginner
PACIFIC BALLROOM 17

3:15 pm – 5:15 pm

**Let's Make a Deal: Rate Exceptions, Adjustments, Flat Fees & Volume Discounts**
Presented by Ruben Linero and Randolph Nairn
In this session, attendees will be introduced to 3E Volume Discounts - how to set them up for various scenarios, how to use them and what effect they have on postings within your 3E system. We also discuss how to report on the results, and we talk about other ways of providing law firm clients with an Alternative Fee Arrangement (AFA), from Rate Exceptions and Rate Exception Groups, to simple percentage-based proforma adjustments that can be pre-set at Client or Matter level. Advanced
PACIFIC BALLROOM 14

**The Importance and Impact of Setups on System Balancing**
Presented by Karen Jakes
This session will cover the best practices, procedures and consideration for Setups within your system to ensure that System Balancing Requirements are fulfilled for the firm. Intermediate
PACIFIC BALLROOM 15
3E Data Structures for Reporting  
Presented by Betsy Esquivel and Ahad Shafiq  
This tutorial will be a SQL-based session to demonstrate the main Database Tables for Reporting, and will demonstrate how to leverage 3E Metrics for building external Reporting solutions. Intermediate TUTORIAL  
PACIFIC BALLROOM 16

Security/User Access in 3E  
Presented by Jay Maclean  
Understand Process Level Security in 3E. This session includes an overview and covers features, behavior, and implementation of User, Role and Security setups. A demonstration will also be given. Intermediate TUTORIAL  
PACIFIC BALLROOM 22

TUESDAY, JUNE 18, 2019

10:00 am – 10:45 am  
3E Billing Journey  
Presented by Justin Farmer, Jill Schornack, and Jeff Caudill, Gallagher, Evelius & Jones  
Join us at this session to experience the billing journey within 3E's new user interface from generating proformas to validating client guidelines to adhering to AFA arrangements to approval, submission and monitoring. Over the past years, we've focused heavily on building enhancements and product integrations that reduce the billing cycle. See for yourself how we've made the billing process faster to bill and increased compliance within the new cohesive interface.  
Client Participation  
SAN DIEGO BALLROOM B

11:00 am – 12:00 pm  
3E Data Insights – Data Analytics Made Easy  
Presented by Lisa Brown  
See how the powerful combination of Data Insights, Microsoft Power BI and the 3E Data Warehouse Console offers more efficient ways for decision-makers to absorb and act on data. Our approach to deliver standard supported analytics and visualizations out of the box provides the fundamental elements to streamline implementation and deliver reports and dashboards faster. In addition to delivering standard reporting content, 3E Data Insights is a self-service data analytics solution that enables users to produce their own analytics and impactful visualizations without the help of IT. Seeing is believing. The product development roadmap will also be presented.  
SAN DIEGO BALLROOM A

3E Lawyer Journey  
Presented by Justin Farmer and Jill Schornack  
See 3E’s new user interface and learn how lawyers and law firm managers work within the new experience. You’ll see “day in the life” demonstrations for how a fee earner enters/reviews time and sees their WIP, how a practice group lead manages through persona-based dashboards, and how a partner analyzing billing and profitability.  
SAN DIEGO BALLROOM B

Working with 3E MatterSphere  
Presented by Beverley Wedderburn and Liam Wright  
From document assembly to direct user engagement via the Client Portal. Join us for a whistle stop tour of key features, user favorites and technical insights that will help you to make the most of the core product and associated capabilities. Intermediate  
PACIFIC BALLROOM 14
1:30 pm – 2:30 pm

The Compliance Conundrum
Presented by Nadia Strobbia
Discover the ongoing and new Thomson Reuters initiatives to help you with the challenges of operating globally, in demanding jurisdictions and ever-changing regulations. This session will also cover highlights of 2019 3E enhancements targeting specific jurisdictional requirements across the world. Intermediate

PACIFIC BALLROOM 21

3E & eBillingHub: What's New
Presented by Marti Attanasio and Janis Gaston
Join us as we discuss what's new with 3E and eBillingHub as we demonstrate the full end-to-end integration initially available in 2.8.2 and being enhanced further in 2.9.0. We will review initial setup through eBH validation rules and submission process as well as new 2.9.0 features for eBH Invoice Status Management and the 3E eBH Health Check Tracker. Intermediate

SAN DIEGO BALLROOM A

Anticipated Disbursements and Why Most Firms Should Avoid Them
Presented by Simon Jarrett
In this session, an experienced consultant discusses the concept of anticipated costs and the many reasons why most law firms should avoid using them. We look at how 3E deals with anticipated cost entries, their effect on matter WIP and masking, and their relationship with the “true” cost when the AP Voucher for it arrives. We look at the differences between hard cost and soft cost masking in 3E, and discuss the tax, regulatory, system balancing and other practical implications of using anticipated costs. Advanced

MARRIOTT GRAND BALLROOM 11

Other Uses for 3E Roles
Presented by Terry Gibson and Luna Liu
Join us as we highlight a few of the places in 3E where roles can be used to restrict sensitive transactions or access to specific groups. Intermediate

MARRIOTT GRAND BALLROOM 12

3E Templates: All Its Many Parts
Presented by Jason Taylor and Jeff Phipps
Many different elements make up the 3E Templates offering (formerly known as Design Gallery), both in regard to the User Tools and the Server Platform. This session will provide an overview of 3E Templates' many parts and what key role they play in the overall document automation solution. Beginner

PACIFIC BALLROOM 16

We're Live, Now What?
Presented by Kim Vickerman, Jennifer Gatling, and Lené Robles, Stinson
Hear from our Thomson Reuters Project Management Group on post go-live perspectives – considering a phase 2 project, upgrade perhaps, support considerations, etc. Intermediate

MARRIOTT GRAND BALLROOM 10

3:00 pm – 4:00 pm

Transitioning to 3E with eBillingHub
Presented by Zachary Rupert and Emilee Roman
When taking on a project like transitioning from Enterprise to 3E, it’s easy to overlook the potential impact on your e-billing process. Join us as we discuss what the process entails from the eBillingHub perspective, the impact and cost of customizations, and hear testimonials from customers who have already completed the migration. Intermediate

PACIFIC BALLROOM 19

3E Billing: What's New
Presented by Marti Attanasio
Come see the new enhancements available in 2.9.0 including Time Type Groups, Cap & Deductible Billing, continued eBillingHub integration, Client/Matter Rate listing and others! Intermediate

MARRIOTT GRAND BALLROOM 10
3E Conflicts: Welcome to Elasticsearch
Presented by Virginia Gleason and Paula Prather
Come learn about the new Elasticsearch search engine for 3E Conflicts that will be replacing the Novus engine in 3E 2.9.0. We will cover what is different between Novus and Elasticsearch, what is the same and what you can expect from performance, reindexing and searching. Intermediate
MARRIOTT GRAND BALLROOM 11

Discover the Power of Monitoring & Diagnostics
Presented by Chris Keithley and Mark Gendein
Come learn how to use Monitoring & Diagnostics to track 3E activities on your 3E instances. Reviewing logs, viewing performance metrics, following execution flows, and tracking configuration changes are only some of the things that will be covered. Beginner
MARRIOTT GRAND BALLROOM 12

3E Budgeting and Forecasting Overview
Presented by Josh Kanakaratnam, Paul Odette, and Brian Ahart
Learn how 3E Budgeting and Forecasting gives you the visibility you need, so you can confidently plan and review firm productivity, efficiency, and profitability. A live demonstration will be provided. Beginner
SAN DIEGO BALLROOM A

3E Paperless Proforma Customizations for Beginners
Presented by Matt Klem and Prashant Bhuptani
This session will showcase "configuration" customizations available for Paperless. You'll learn how to adjust the look and feel, and behavior of many of 3E Paperless Proforma’s screens with minimal technical knowledge. Beginner
SAN DIEGO BALLROOM C

Lawyer Experience Overview Demonstration
Presented by Priya Ramaswamy, Kyra Olson, and Mithat Mese
View a live demonstration of how lawyers increase their efficiency with the 3E lawyer experience. Learn how lawyers can use the web and mobile user interfaces to view persona based dashboards, financial insights, clients and matters, and work with time entry, notifications and tasks, and proformas. Beginner
PACIFIC BALLROOM 16

4:15 pm - 5:15 pm

3E User Interface Refresh: Unifying the Experience Across the 3E Portfolio
Presented by Gerry Lattimer and Kyra Olson
This Product and Technology session will provide an overview and update of the new 3E user interface that will replace Silverlight as the UI framework and experience for 3E. We will demonstrate our progress to-date and explain how the interface is evolving and providing improved capabilities while minimizing impacts on customizations, upgrades, and re-training. The session will also cover user interface update plans for 3E Workspace and Mobile – the lawyer user experience that brings together financial management, proforma, matter management, business development, and more for lawyers – and our plans to unify the experience across products. All
PACIFIC BALLROOM 16

Image Connect: Coming to a Cloud Near You
Presented by Virginia Gleason and Michael Wright
Take a look at Image Connect in the Cloud. We'll discuss deployments, configuration and differences between the cloud and on-premises options and how the cloud deployment will come into play for on-premises implementations in the future. Intermediate
MARRIOTT GRAND BALLROOM 10
All About Volume Discounts
Presented by Marti Attanasio and Robyn Geisler
Join this session to get a better understanding of the 3E Volume Discount functionality from start to finish. Topics covered will include input of discount, applying discount, billing discount, and calculating accrual of discount. This session will also cover some pointers that can help you take full advantage of the 3E Volume Discount features. Intermediate
MARRIOTT GRAND BALLROOM 11

3E Reports & Metrics
Presented by Jay Maclean
Configuration, Scheduling and Metric Retention setups and best practices. Make the most of the highly versatile Metric Presentations to easily mine your data and provide quick and meaningful result sets. Beginner
MARRIOTT GRAND BALLROOM 12

WEDNESDAY, JUNE 19, 2019

9:00 am – 10:30 am

Paying the Bills: How 3E Deals with Accounts Payable, from Supply to Settlement, in Any Currency
Presented by Simon Jarrett and Lyndsey Nations
We show you how to set up Vendors/Payees, and how to post transactions in AP, with specific focus on: 1. Payees whose invoices will contain Hard Costs and therefore need to be on hold until those Hard Costs have been billed to the firm's client and the client has paid the bill. 2. Payees whose invoices have to go through an authorization process (unauthorized suspense) 3. AP Transaction Type masking 4. Posting invoices (Vouchers) with Hard Costs and/or GL expenses 5. Posting pre-paid invoices (Vouchers) for direct payments to suppliers 6. Using models to create Recurring Vouchers 7. Reporting / Inquiries 8. Multi-currency (with brief reference to realized FX gain/loss treatment) 9. Payment runs 10. Holding vouchers with hard costs until clients pay their bills (incl. reclaiming the VAT on Counsel Fees) Intermediate
MARRIOTT GRAND BALLROOM 10

Customization Migration for Beginners
Presented by Matt Klem and Scott Strachan
Unsure about how to move a customization from one environment to another? In this session, we'll answer all your questions about the best practices of moving data, customizations and more from one 3E instance to another. Beginner
MARRIOTT GRAND BALLROOM 11

3E Basic IDE
Presented by Sandeep Gupta and Prashant Bhuptani
The IDE (Integrated Development Environment) provides a toolset that allows firms to make easy changes to 3E processes to improve the user experience. Learn how to modify the "QuickFind, Advanced Find, Query Results and Worklists", turn on the Audit or Attachments features where desired, and add UDFs to processes. Intermediate
MARRIOTT GRAND BALLROOM 12

3E Basic Report Design
Presented by Jay Maclean
Clone and configure 3E Report Presentations to meet your reporting needs. Use the IDE to create custom Report Objects and Reports. Advanced
PACIFIC BALLROOM 14

11:00 am – 12:00 pm

Build Tool and Developer Workflows
Presented by Harun Diri
Learn how to use the new build tool and automate builds and deployments.
MARRIOTT GRAND BALLROOM 10

Who Created All These Tables? Streamlining your 3E Metrics
Presented by Charles Zack
If your firm has been on 3E for a while, there may be a lot of Metrics and Presentations built in the past that are no longer needed. This session will review strategies and tools for streamlining the Metrics and Presentations (and their associated tables) in your 3E system. Advanced
MARRIOTT GRAND BALLROOM 11
Tax Does Not Have to Be Taxing  
Presented by Nadia Strobbia and Rhonda Compher  
We will explore different Indirect tax and Withholding tax scenarios commonly enforced in jurisdictions around the world and find out how 3E can help address the different requirements with ease. Intermediate  
MARRIOTT GRAND BALLROOM 12

3E Billing and GL Metrics Insights  
Presented by Marcus Brannon and Brad Stewart  
Do you have questions on how to navigate through running a metric? Come hear what the most commonly requested standard Billing and GL Metrics are, and how you can use them to gain better insights into your financial picture. Beginner  
SAN DIEGO BALLROOM A

3E Templates Integration & Troubleshooting Explained  
Presented by Matt Klem and Jeff Phipps  
This session will give you a deep dive into the true integration between 3E and 3E Templates (formerly known as Design Gallery). By learning all about how the two systems integrate, you will get some best practices for troubleshooting when issues arise. All  
PACIFIC BALLROOM 15

3E 1099s: New Process for 2019  
Presented by Karen Walton and Jerid Dupier  
Come see the new process in 3E for generating and reporting on your annual 1099s. No longer will you be required to download a separate generator, the process is now part of core 3E. We will demonstrate our integration with our new partner for 1099 generation - GreenShades - including how to access to create the actual 1099 forms and electronic files. Beginner  
PACIFIC BALLROOM 22

3E Profitability Modernized with Cost to Serve and Data Insights  
Presented by Lisa Brown, Paul Odette, and Josh Kanakaratnam  
Learn how the all-new 3E Profitability enables your partners and firm leadership with more insights to help with key decisions for how to profitably manage and grow clients, matters, practices, and the firm. Beginner  
SAN DIEGO BALLROOM A

3E in the Cloud  
Presented by Jerid Dupier, Ruby Lee, and Mark Gendein  
This session will outline the fundamental aspects of 3E in the Cloud with an overview of the offering including cloud security. We will provide an update on our Cloud progress and customer implementations to date. Finally we will outline our vision for the future of 3E in the Cloud with a review of the roadmap and its potential impact for all customers. Intermediate  
SAN DIEGO BALLROOM B

Troubleshooting 3E Security – My Friends Can Do It, So Why Can’t I?  
Presented by Charles Zack and Jay Maclean  
Trying to troubleshoot and maintain an existing 3E Security implementation can be a chore. This session will cover reports and strategies that will help you refine and simplify an inherited 3E Security implementation. Advanced  
MARRIOTT GRAND BALLROOM 11

Time and Cost Auditing  
Presented by Kathryn Dunlap  
Identify previous adjustments/proforma adjustments for billed and unbilled transactions and trace it through the General Ledger and Reporting. Intermediate  
MARRIOTT GRAND BALLROOM 12
Customizing 3E Workspace
Presented by Matt Klem
In this session, we will showcase some of the customization features of 3E Workspace. This includes adding and maintaining your own widgets, modifying existing lists and detail pages, and creating custom queries for accessing 3E data. Intermediate
SAN DIEGO BALLROOM C

Recipes for Success: How to Maximize Your Firm's Chances of a Successful 3E Implementation
Presented by Simon Jarrett and La Vonne Maliga
Join our experienced consultants in an interactive session where we discuss the elements of a successful 3E implementation. We address key elements of preparation for a transition to 3E, along with tips, best practices and practical advice to help your firm with resourcing challenges, change management, data cleansing, business process analysis, user acceptance testing, and quality assurance. All
MARRIOTT GRAND BALLROOM 10

A Balancing Act - Closing the Month and the Year in 3E
Presented by Lyndsey Nations and Karen Jakes
Learn from our experienced 3E Application Consultants how to prepare for and run a month-end and year-end close in 3E, how to ensure that your 3E system remains in balance throughout the month and year, and how to control postings at month end to prevent (or allow) prior period postings (including prior year postings). Learn how to configure and use the At-A-Glance balancing dashboard, and how to run and export the relevant metrics for use in the Thomson Reuters-recommended Balancing Spreadsheet (MS Excel). Learn how to troubleshoot out-of-balance issues, and our best practice tips and practical advice for keeping your 3E system healthy. Intermediate  TUTORIAL
MARRIOTT GRAND BALLROOM 10

Show and Tell: Self-Service Reporting Using 3E Dashboard Design and 3E Notify
Presented by Simon Jarrett and Jay Maclean
In this session, we will explore three of the "persona" dashboards offered in 3E, with specific emphasis on "self-service" reporting. Your consultants will demonstrate the Working Timekeeper dashboard, the Managing Timekeeper dashboard and the Firm Management dashboard, along with the associated setups and configurations that control what data each dashboard will display to the end user. We will also explore how to use key event-driven notifications to populate the Notify Inbox dashboard part, and/or send automated email notifications to key users. Intermediate  TUTORIAL
MARRIOTT GRAND BALLROOM 11

Getting Workflows to Work for You
Presented by Chris Keithley and Sandeep Gupta
This tutorial will dive deep into the various Workflow options available in 3E. Workflow provides the ability to get approvals Proforma for Billing, Payment Requests and Vouchers, Trust Disbursements, and Write Offs into the right hands quickly and without any need to pick up the phone or send an IM. Intermediate  TUTORIAL
MARRIOTT GRAND BALLROOM 11

Why Microsoft Power BI and Data Insights is a Winner
Presented by Lisa Brown and Michael Turner, Pinnacle
Take your data to the next level with Microsoft Power BI, a robust tool used to transform, analyze and visualize data. See how easy it is to leverage the combination of Power BI functionality and standard reporting content from Data Insights to easily create stunning, impactful Power BI reports. Power BI delivers more efficient ways for decision-makers to absorb and act on data to communicate your message effectively. With built-in natural language processing, mobile capabilities, and integrations with Microsoft Flow, you can do more with Power BI. Come see why Microsoft Power BI is positioned as the leader in the Gartner Magic Quadrant for Business Intelligence and Analytics Platforms.
SAN DIEGO BALLROOM C
3E Templates: Template Development in a Nutshell
Presented by Matt Klem and Jason Taylor
Come see the entire template development cycle for 3E Templates (formerly known as Design Gallery) in one tutorial. We'll cover assessing your template's needs, using Standard Templates as the baseline for design, configuring 3E (ex: labels, template options), customizing components, setting up distribution, and publishing to 3E. In addition, we will look at some advanced tips and tricks. Intermediate TUTORIAL
PACIFIC BALLROOM 16

3E Administration, Performance, and Troubleshooting
Presented by Marcus Huddleston and Scott Strachan
What is the right formula for making sure your 3E system is running just right? Find out in this presentation as we discuss the 3E infrastructure, system maintenance, metric retention, and task scheduling. TUTORIAL
PACIFIC BALLROOM 21

Help me Understand My 3E Setups – Masking, GL Types, GL Books, Units, and More
Presented by Rhonda Compher and Bill Motter
The nuts and bolts of 3E setups. Join this tutorial to understand the puzzle pieces that make 3E hum from Sub-Ledger to General Ledger. We will examine Units, GL Types, GL Books Masking and more. Intermediate TUTORIAL
PACIFIC BALLROOM 22

The 3E in the Cloud Experience
Moderated by Tracy O'Keefe and Ray LoCicero, Gordon Arata
One year after go live, hear from Gordon, Arata, Montgomery, Barnett, McCollam, DuPlantis & Eagan, LLC about their experience with 3E in the Cloud. During this session, you'll hear from Ray LoCicero, Firm Administrator, about his firm's selection process, why they chose 3E in the Cloud, the staffing of their implementation project, lessons learned from one year living with the product, and how the product has impacted the firm. TUTORIAL
SAN DIEGO BALLROOM B

THURSDAY, JUNE 20, 2019

8:45 am – 9:45 am
3E Product Roadmap
Presented by Jerid Dupier, Paul Odette, and Ruby Lee
Learn about the future direction for the core 3E business applications including 3E Data Insights, 3E Templates, lawyer-facing tools, and more! Intermediate
SAN DIEGO BALLROOM B

Rack up the Most Rewards with Credit Cards in 3E
Presented by Christina Collins
Let's dive in to the different methodologies for setting and tracking credit cards in 3E. Options range between creating the credit card as a zero balance account, complete with bank reconciliation, or using the Incurring Payee option aka Super Vendor. See which one works best for your firm!
MARRIOTT GRAND BALLROOM 11

10:15 am – 11:15 am
Security in 3E
Presented by Gerry Lattimer
Join us for a discussion of the current state of web application security and how 3E security features fit into the picture. Intermediate
MARRIOTT GRAND BALLROOM 10

Timekeeper Reporting
Presented by Kathryn Dunlap
For those firms that do not have GL Timekeeper in their segmented accounts, demonstrate key fields and our favorite reports that include Timekeepers for more indepth value. Intermediate
MARRIOTT GRAND BALLROOM 11
**3E Voucher Taxes**  
Presented by Karen Walton  
Bring your questions and ideas to this interactive session where we will cover the flexibility of setting up various taxes in 3E and then how to apply them to your vouchers. Learn about setups, simple tax, two taxes, tax on tax, de-tax and other tax scenarios. Beginner  
MARRIOTT GRAND BALLROOM 12

**Simplifying Time Entry**  
Presented by Priya Ramaswamy and Kyra Olson  
Learn how assistants and lawyers use time entry within 3E Workspace when working in the office and on the go with their mobile device. This session will be a live demonstration. Beginner  
SAN DIEGO BALLROOM A

**3E Technology Roadmap**  
Presented by Ruby Lee and Matt Ott  
Join us for a session focused on recent features added to our 3E Platform, 3E Templates platform, tools, utilities, integrations, and overall architecture to help your Development and IT staff team members build, deploy, and manage your 3E system. Included will be our vision on how recent cloud enablement enhancements will impact 3E configuration and deployments.  
SAN DIEGO BALLROOM B

**3E Inter-company Billing**  
Presented by Christina Collins  
This session will cover the set ups and considerations when implementing ICB and an overview of the ICB process  
MARRIOTT GRAND BALLROOM 10

**MatterSphere Developer Productivity**  
Presented by Liam Wright and Allan Wheatley  
This session will cover areas such as MatterSphere debugging scenarios, creating and distributing custom controls, code reuse, and version control. This session is aimed at developers. Advanced  
MARRIOTT GRAND BALLROOM 11

**Leveraging the Power of Your 3E Platform**  
Presented by Russ Holmes, CEO and Founder, Cosine  
Cosine solutions extend the native capabilities of the 3E platform, providing comprehensive new feature sets not available natively within the platform. Built in 3E, our Matter Planning and Pricing module delivers the capabilities you need natively from within the 3E platform whilst providing a unified, app like adaptive HTML5 user experience that will drive high adoption with end users. Don’t miss our session to learn more about how our tools can help drive a higher return on your 3E investment!  
MARRIOTT GRAND BALLROOM 12

**3E User Interface Refresh: Technology & Architecture**  
Presented by Gerry Lattimer and Mithat Mese  
This session will provide a conceptual and architectural overview of the 3E Silverlight User Interface replacement. Join us as we discuss the way forward to a new decoupled UI. Advanced  
SAN DIEGO BALLROOM C
3E Collections Overview
Presented by Virginia Gleason, Esther Davis, and Janis Gaston
Come see what 3E Collections can do for you to streamline your collections workflow. This session is geared towards firms that are not currently utilizing the Collections functionality, but would like to see and understand its features, functions and capabilities. Beginner

ClientPay. Session sponsored by ClientPay
PACIFIC BALLROOM 16

3E Favorite Features
Presented by Phillip Underwood and Lisa Kenyon
Join our front-line product subject matter experts to hear some of their favourite features. This is a good session for new customers getting an understanding of 3E as well as established customers looking for ways to be more efficient with the system and business processes.

PACIFIC BALLROOM 18

3E Templates: What's New
Presented by Jason Taylor and Matt Klem
A lot is happening in the 3E Templates (formerly known as Design Gallery) world and we would like to show off both recent and future enhancements in the works. Discover what's new with the product offering, including its Standard Templates package. Beginner

MARRIOTT GRAND BALLROOM 12

Disaster Recovery
Moderated by Marcus Huddleston
This session will be an open discussion on the various ways Disaster Recovery is being done at firms today. We'll dive into technology being used, how testing is performed, and the tie-back to the overall Business Continuity plan of the firm.

SAN DIEGO BALLROOM C

Working with Elasticsearch Technology
Presented by Beverley Wedderburn and Liam Wright
New to Elasticsearch technology and curious to see how it works? Or maybe you're thinking about upgrading and want to know more about how we have implemented the technology and the associated benefits? Join us for an overview of the new search solution where we will demonstrate and deep dive into the technology powering MatterSphere v8. Intermediate

PACIFIC BALLROOM 16

1:30 pm – 2:30 pm

It's All About Having the Right Tools
Presented by Chris Keithley
Having and using the right tool at the right time makes tasks much easier. During this session, we will walk through how Instance Admin, Utilities 3E, and other tools can help you more easily control and manage your 3E system. We will also share our planned tool improvements for 2019. Intermediate

MARRIOTT GRAND BALLROOM 11

Masking Made Simple
Presented by Karen Jakes
Join us to find out how to create 3E Masking Set Ups for your Firm, the aim of this session is to provide straightforward guidance to fully meet all your masking requirements. During this session we will investigate all areas providing tips, tricks and considerations from Set Ups through to Testing. Intermediate

MARRIOTT GRAND BALLROOM 12
Workflow Reports
Presented by Prashant Bhuptani
This session will provide an overview of the various workflow options available in 3E and deep dive into how the firm can create custom reports for their users to help them determine the current step and the current owner of their workflow request.

SAN DIEGO BALLROOM C

Explore our Project Quality Model
Presented by Kim Vickerman and Jennifer Gatling
From small firms to global organizations, we have an implementation method for you! We will review the various methods developed by our staff to ensure a successful implementation for any size of firm. Beginner

PACIFIC BALLROOM 15
### MONDAY, JUNE 17, 2019

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Presenters</th>
<th>Description</th>
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<tbody>
<tr>
<td>1:00 pm – 3:00 pm</td>
<td><strong>Interim Billing in Enterprise</strong></td>
<td>Heidi Fedler</td>
<td>Join us for a deep dive into the Enterprise Interim Billing feature (aka Fixed Fee or On Account Billing). Interim Billing enables your firm to render invoices without relieving work-in-progress. As unallocated credits reduce accounts receivables, interim balances reduce unbilled time and costs. This tutorial will cover everything from setups, to transactions, to the impact on statistics and reporting. Intermediate TUTORIAL. PACIFIC BALLROOM 21.</td>
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<tr>
<td>3:15 pm – 5:15 pm</td>
<td><strong>Framework Tools and Screen Customizations in Enterprise</strong></td>
<td>Matt Jamma</td>
<td>Join us for an in-depth look at the Enterprise Tools menu functions and how they can be used to enhance and customize the Enterprise experience for your users. This tutorial will focus mainly on the functions that impact the user interface, including Data Dictionary Manager, Message Manager, Label Preferences, Query Builder, Multi Query Builder, and Tree View Editor. We will also explore the benefits of using Visual Basic for Applications (VBA) to extend the functionality of Enterprise applications by customizing screens to streamline processes as well as to secure data. TUTORIAL. PACIFIC BALLROOM 22.</td>
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### TUESDAY, JUNE 18, 2019

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<tr>
<td>1:30 pm – 2:30 pm</td>
<td><strong>WebView: Basic Time Entry Tips &amp; Tricks (Part I)</strong></td>
<td>Lynnette Gentry-Martinez and Victoria Rodriguez</td>
<td>Come sail with us as we explore the fundamental WebView interfaces for users to access, enter, and interact with their timecards such as Calendar View, Daily Time Entry View, Timecard List, Weekly View, Grid Views, Direct Time Entry, Dictionary, My Shorthand, Frequent Matters, Edit Narratives and UDF display options. This is the basic information that every admin and user should know. PACIFIC BALLROOM 22.</td>
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<tr>
<td>3:00 pm – 4:00 pm</td>
<td><strong>WebView: Advanced Time Entry Tips &amp; Tricks (Part II)</strong></td>
<td>Lynnette Gentry-Martinez and Victoria Rodriguez</td>
<td>Get ready to soar to new heights as we take off to build on Part I’s lessons. We will look at advanced methods such as Timers, Suspense Time, Unassigned Time, Time Reports and Global Timecards to leverage functionality to enhance productivity and performance. PACIFIC BALLROOM 22.</td>
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4:15 pm – 5:15 pm

**Enterprise Billing Manager and APGL 3.9 and 3.10 Post-Release Enhancements**

Presented by Heidi Fedler and Maggie Walker-O’Connor

In this session, see your maintenance dollars at work with post-release enhancements available in Enterprise Billing and APGL 3.9 and 3.10. All

*ClientPay.* Session sponsored by ClientPay

PACIFIC BALLROOM 21

Data Warehouse Reporting in Enterprise

Presented by Matt Jamma

Data Warehousing in Enterprise provides an easy method of combining data from across management reports into a single, easily modified, final report. By selecting the Data Warehousing option when generating a standard report in the Enterprise system, the report creates a table of data that is accessible through report writer applications. In this session, using standard Enterprise data warehouse reports, you will learn how to set up Excel to communicate with these Enterprise tables to retrieve information from them for reporting.

PACIFIC BALLROOM 22

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**WEDNESDAY, JUNE 19, 2019**

9:00 am – 10:30 am

**Enterprise Data Mining Tips & Tricks**

Presented by Matt Jamma

Discover useful tips and tricks for mining data in Enterprise. Some areas we will cover include Billing Inquiry, standard reports by topic or need.  

TUTORIAL  
PACIFIC BALLROOM 16

**Enterprise Billing and APGL 3.11 and Post GA Enhancements**

Presented by Heidi Fedler and Maggie Walker-O’Connor

In this session, we will review the enhancements delivered in Enterprise Billing & APGL 3.11 and provide an update on how the Enterprise 3.11 upgrades are progressing. We will also cover enhancements completed since the Enterprise 3.11 original release date. All  

TUTORIAL  
*ClientPay.* Session sponsored by ClientPay

PACIFIC BALLROOM 21

11:00 am – 12:00 pm

**All About Enterprise and Your Path Toward the Future**

Presented by Elisabet Hardy, Patrick Hurley, and Marty Brej

Enterprise users, don't miss this session! Learn about what Thomson Reuters has been working on to support Enterprise clients including the latest enhancements since the launch of version 3.11. The session will begin with a general update, including recent bug fixes, GDPR considerations, progression timelines, and what's up next on the horizon. The conversation will then cover options for upgrading or planning a move—-to ProLaw, 3E, or even 3E in the Cloud—including software and service options that simplify the transition process. You will also hear from clients that recently made the move from Enterprise to 3E.

PACIFIC BALLROOM 21

1:45 pm – 2:45 pm

**Extend Best Practices and 3.11 Enhancements Review**

Presented by Matt Jamma

Come and learn about the customization capabilities available with Enterprise Extend. Learn how to customize standard events to tailor them to your firm's needs, and gain a better understanding of the enhancements included in the 3.11 release. Previous knowledge of Extend is strongly recommended. We will also provide an update on how the Enterprise 3.11 upgrades are progressing and where you can find more information on the Enterprise Progression.

PACIFIC BALLROOM 22
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<td>even removing it.</td>
<td>TUTORIAL</td>
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SAN DIEGO BALLROOM A

**THURSDAY, JUNE 20, 2019**

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<th>Time</th>
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<tr>
<td>8:45 am – 9:45 am</td>
<td>Using SQL for Basic Troubleshooting in Enterprise</td>
<td>Charles Zack</td>
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<td></td>
<td>This session will cover basic SQL concepts and provide some ideas for basic</td>
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<td>troubleshooting in Enterprise using SQL.</td>
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<td>PACIFIC BALLROOM 16</td>
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<td>10:15 am – 11:15 am</td>
<td>Enterprise Favorite Features</td>
<td>Jane Heino</td>
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<td>Join Thomson Reuters subject matter experts to hear about some of their</td>
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<td>favorite features. This is a perfect session to learn how to become more</td>
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<td>efficient with the system and business processes. Topics will include Billing</td>
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<td>Ledger, WebView, Conflicts, Records and Extend.</td>
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<td>PACIFIC BALLROOM 22</td>
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<tr>
<th>Time</th>
<th>Session Title</th>
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<tr>
<td>11:30 am – 12:30 pm</td>
<td>Data Insights for Enterprise</td>
<td>Lisa Brown and Michael Turner,</td>
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<tr>
<td></td>
<td>Looking to move to 3E and thinking about your reporting solution? Data</td>
<td>Pinnacle</td>
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<td>Insights for Enterprise provides rich persona-based visual analytics using</td>
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<td>Microsoft Power BI and the 3E Data Warehouse Console to manage performance</td>
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<td>and make timely decisions. Implement Data Insights today in Enterprise and</td>
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<td>seamlessly move your reports and dashboards to 3E. Starting your Data</td>
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<td>Insights implementation ahead of your 3E implementation will reduce the</td>
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<td>amount of change your fee earners and managers will experience when you go</td>
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<td>live in 3E. This also allows the 3E project team to focus on other aspects of</td>
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<td>the 3E implementation while preserving your investment in Data Insights.</td>
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<td>SAN DIEGO BALLROOM B</td>
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<th>Time</th>
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<tr>
<td></td>
<td>Data Privacy in Enterprise</td>
<td>Charles Zack and Patti Goettel</td>
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<td></td>
<td>In this session, we will review the Enterprise Data Privacy feature set</td>
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<td>including the installation program, the Enterprise database schema that</td>
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<td>allows you to identify ordinary users from super users, and the Enterprise</td>
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<td>Data Privacy utility that enables you to mark the fields in your Enterprise</td>
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<td>database that contain PII data, optionally mark records to be protected, mark</td>
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<td>records to be obfuscated and the obfuscation process. Advanced</td>
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<td>PACIFIC BALLROOM 21</td>
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<th>Time</th>
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<td>Innovative Ideas to Managing New Client/Matter Intake and Managing Client/</td>
<td>Ruben Linero</td>
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<td>Innovative ideas to managing new client/matter intake and managing client/</td>
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<td>matter contacts using alternate address. For clients who have multiple</td>
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<td>contacts on clients and matters it becomes almost impossible in Enterprise</td>
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<td>where and how to create a repository for contacts. We will show you how to</td>
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<td>use some alternatives on how to better manage these in Enterprise using</td>
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<td>the Alternate address process and creative ways to place them on your bills.</td>
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<td>Innovative ideas to managing</td>
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<td>PACIFIC BALLROOM 22</td>
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<td>1:30 pm – 2:30 pm</td>
<td><strong>Enterprise Matter Budgets</strong></td>
<td>Presented by Ruben Linero</td>
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<td>3:15 pm – 4:15 pm</td>
<td><strong>Enterprise Billing Rates</strong></td>
<td>Presented by Heidi Fedler and Maggie Walker-O'Connor</td>
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<td></td>
<td><strong>WebView 5.5 / 5.6 Enhancements</strong></td>
<td>Presented by Lynnette Gentry-Martinez and Victoria Rodriguez</td>
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**Progressing to 3E: Implementation Readiness Services Overview**

**Presented by Val Brady and Daniel Martinez**

Are you wondering how to start developing a strategy to move to 3E? This tutorial will help you to develop a vision by identifying the business needs that drive 3E value such as your current pain points, critical business processes, and success criteria. We will take you through a combined technical and application session, including a review of a checklist on what can be done today to prepare for your 3E implementation, while still delivering value in Enterprise. All **TUTORIAL**

**PACIFIC BALLROOM 18**

**Keys to a Successful 3E Implementation**

**Presented by Somesh Surapureddi, Val Reece, and Mark Calabrese**

Geared toward clients who are either considering a move to 3E, are currently in procurement, or who have made the commitment to move to 3E but are not yet scheduled to launch, this highly interactive session focuses on what makes 3E implementation successful. The session is hosted by all three Services Directors for North America, who are ultimately accountable to Thomson Reuters clients for ensuring each firm achieves stable, live operations on 3E. This session will provide time for Q&A and will also help attendees plan their VANTAGE itinerary to make the most informed decision when considering moving to the industry’s most powerful and versatile financial management system. All **TUTORIAL**

**PACIFIC BALLROOM 19**

**Feature Comparative: Reporting**

**Presented by Matt Jamma and Christina Collins**

Join us as we compare reporting in Enterprise to 3E. **TUTORIAL**

**PACIFIC BALLROOM 18**

**Feature Comparative: Advanced Billing Arrangements**

**Presented by Karen Lewis and Janis Gaston**

Join us while we explore how Enterprise and 3E differ when handling advanced billing arrangements, including multi-payor, splits, fixed fee, volume discounts and alternative fee arrangements. Intermediate **TUTORIAL**

**PACIFIC BALLROOM 19**

**We're Live, Now What?**

**Presented by Kim Vickerman, Jennifer Gatling, and Lené Robles, Stinson**

Hear from our Thomson Reuters Project Management Group on post go-live perspectives – considering a phase 2 project, upgrade perhaps, support considerations, etc. Intermediate **Client Participation**

**MARRIOTT GRAND BALLROOM 10**

**3E Does It Better: GL**

**Presented by Marcus Brannon, Rhonda Compher, and Nancy Agpaoa**

Join us as we discuss the similarities and differences between Enterprise General Ledger and 3E including popular GL reports/metrics. Intermediate **TUTORIAL**

**PACIFIC BALLROOM 18**

**Technical Comparative: Product System Requirements**

**Presented by Marcus Huddleston and Scott Strachan**

Join us for a stem-to-stern review of the 3E Product System Requirements (PSR). **TUTORIAL**

**PACIFIC BALLROOM 19**
3:00 pm – 4:00 pm

**Feature Comparative: Setups**

Presented by Janis Gaston and Rhonda Compher

Join us as we discuss improvements to the setup processes between Enterprise and 3E. 3E offers much more flexibility and control over the impact of setups. We will review enhancements in application and master file setups like statuses, offices, and departments. Additionally, we'll discuss VB Options vs. Overrides/Set System Options, and finally Control Panels vs Financial Controls. Beginner

PACIFIC BALLROOM 18

**Peer Perspective: Going Live on 3E Next Month – Mission Accomplished?**

Moderated by Tracy O'Keefe, Shelley Ford, Cassels Brock, and Victor Fernandez, Fried Frank

Are you interested in hearing about an active Enterprise to 3E implementation that is a month away from going live presented by a customer? If so, this is a session not to be missed! Learn how this firm has executed their 3E implementation plan, including lessons learned and advice to any firms considering the move.

Client Participation

PACIFIC BALLROOM 21

4:15 pm – 5:15 pm

**Implementation Challenges in a Climate of Scarce Resources**

Presented by Jane Threlkeld and Avneet Sahni, both of Source Consulting Group

Source has been assisting clients in implementing 3E for 10+ years. This session will talk about some challenges we have seen over multiple projects and ways to help mitigate them. We will also discuss ideas and options for managing a large implementation project with scarce resources.

PACIFIC BALLROOM 15

**Learn From Your Peers: The Afterglow of 3E Go Live – To Infinity & Beyond!**

Presented by Jan Wong, Torys

Your firm has gone live with 3E...now what? Learn about how one firm has used the momentum created by 3E Go Live to introduce system initiatives to increase efficiency and effectiveness for both lawyers and administrative departments.

Client Participation

SAN DIEGO BALLROOM C

**Progressing to 3E: Understanding the Legacy Data Review**

Presented by David Goodrich and Stacey Lindahl

Are you wondering what you can do today with your Enterprise data to prepare for a successful conversion to 3E? In this tutorial, we will focus on the elements required for a successful data conversion to 3E while keeping an eye on current operations in Enterprise. You'll learn about data integrity processes, tips and techniques on data clean-up, and best practices that prepare your data for migration. All

PACIFIC BALLROOM 18

**Feature Comparative: Framework**

Presented by Terry Gibson and Sandeep Gupta

In this session, we will review the similarities and differences between framework in Enterprise and 3E (e.g., printing, global replace, export to Excel, modeling, worklist, workflow, and web services). Intermediate

PACIFIC BALLROOM 19
9:00 am – 10:30 am

**Feature Comparative: Multi-currency**

Presented by Robyn Geisler, Randolph Nairn, and Rhonda Compher

Explore the ease with which 3E handles multicurrency, from sub-ledgers to GL. This session will focus on the similarities and differences of the multicurrency framework, currencies conversion, and supportive reporting features in Enterprise and 3E. We will also walk through added feature sets like explicit currency, realized/unrealized FX, and the unlimited currency rate types available in 3E. Intermediate

PACIFIC BALLROOM 18

**Feature Comparative: Masking**

Presented by Christina Collins and Karen Jakes

Join us for an exploration of the similarities and differences between masking in Enterprise and 3E.

TUTORIAL

PACIFIC BALLROOM 19

11:00 am – 12:00 pm

**Progressing to 3E: Understanding the Impact and Cost of Customizations**

Presented by Marcus Huddleston and Prashant Bhuptani

Learn from Thomson Reuters Services management the types of customizations available within 3E and their impact to your system. We'll cover the benefits of going with a vanilla implementation and discuss cost analysis of client-coded customizations. Additionally, you'll get an understanding of the ongoing support and costs associated with customizations.

PACIFIC BALLROOM 18

**Feature Comparative: Proformas and Bills - Part I**

Presented by Ruben Linero and Lyndsey Nations

In this session, we will review the similarities and differences in the billing process between Enterprise and 3E. Intermediate

PACIFIC BALLROOM 19

1:45 pm – 2:45 pm

**Lessons Learned: How to Get the Most from 3E with Pinnacle's Global Team of Experts and Their Clients**

Presented by Honda Ngo and Jason Whalen, both of Pinnacle

Pinnacle's team knows the Thomson Reuters finance systems inside out, with expertise across conversion, compliance, templates, billing processes and business intelligence. In this interactive session we answer your questions on how you can get the most from your investment in 3E. We also share how we integrate the toolset with Intapp and use it to manage our business. The session will be chaired by one of our clients who uses 3E themselves. If you have a burning issue you'd like our help with please email your question to ask-pinnacle@pinnacle-oa.com. There's a prize for every question we cover in the session.

PACIFIC BALLROOM 15

**Recipes for Success: How to Maximize Your Firm's Chances of a Successful 3E Implementation**

Presented by Simon Jarrett and La Vonne Maliga

Join our experienced consultants in an interactive session where we discuss the elements of a successful 3E implementation. We address key elements of preparation for a transition to 3E, along with tips, best practices and practical advice to help your firm with resourcing challenges, change management, data cleansing, business process analysis, user acceptance testing, and quality assurance. All

MARRIOTT GRAND BALLROOM 10

**Making the Transition to 3E Accounts Payable**

Presented by Theresa Gutierrez, Nancy Agpaoa, and Bill Motter

Join us as we compare Enterprise Accounts Payable to 3E AP, including reporting. Beginner

PACIFIC BALLROOM 18

**Peer Perspective: Rightsizing a 3E Implementation at a Mid-Size Firm**

Moderated by Jane Heino, Randy Lee, Robins Kaplan, Chris Lamb, Howard & Howard, Will Michelson, Morris Nichols (unconfirmed), and Linda Giunta, Schnader (unconfirmed)

Hear from seasoned mid-size firms about their experience in implementing 3E. There will be clients mid-implementation and live. These firms will discuss their selection process, why they chose 3E, their project staffing strategy, lessons learned, and how they are able to continue momentum despite challenges.

Client Participation

PACIFIC BALLROOM 19
Feature Comparative: Paperless Proforma
Presented by Karen Altnow
In this session we will review the similarities and differences between Paperless Proforma in Enterprise and 3E. All
PACIFIC BALLROOM 21

3:15 pm – 4:45 pm

The 3E in the Cloud Experience
Moderated by Tracy O'Keefe and Ray LoCicero, Gordon Arata
One year after go live, hear from Gordon, Arata, Montgomery, Barnett, McCollam, Duplantis & Eagan, LLC about their experience with 3E in the Cloud. During this session, you'll hear from Ray LoCicero, Firm Administrator, about his firm's selection process, why they chose 3E in the Cloud, the staffing of their implementation project, lessons learned from one year living with the product, and how the product has impacted the firm. TUTORIAL
SAN DIEGO BALLROOM B

Feature Comparative: Billing Rates
Presented by Robyn Geisler and Janis Gaston
Join us as we compare and contrast rate functionality between Enterprise and 3E. We will examine timekeeper, cost, and exception rates. We'll also demonstrate a few rate scenarios. Intermediate TUTORIAL

Progressing to 3E: Data Migration De-mystified
Presented by David Goodrich and Stacey Lindahl
Best practices and methodology for migrating data from Enterprise to 3E. All TUTORIAL

THURSDAY, JUNE 20, 2019

8:45 am – 9:45 am

3E Implementations - Hindsight is 20/20 and Insights Are Golden Nuggets!
Presented by Daniel Martinez and Avanthi Masthoff, Foley & Lardner
Come listen to a Thomson Reuters Services Leader share important facts about our implementation methods and a broad-based experienced Client Representative share her hindsight and insights on the numerous 3E implementations she has worked on and led. This session is intended to provide those considering, or who have recently signed a 3E contract, information on best practice, training users, avoiding pitfalls, and how to prepare for and support a positive outcome in what is a 3E implementation project. Customer-led
PACIFIC BALLROOM 18

Technical Comparative: Data Imports/Exports
Presented by Marcus Huddleston and Ahad Shafiq
In this session, we will review the similarities and differences between data loads and unloads in Enterprise and 3E. Beginner
PACIFIC BALLROOM 19

10:15 am – 11:15 am

Feature Comparative: Proformas and Bills - Part II
Presented by Ruben Linero and Lyndsey Nations
In this session, we will review the similarities and differences in the billing process between Enterprise and 3E. Intermediate
PACIFIC BALLROOM 18

Feature Comparative: General Ledger and Reporting
Presented by Bill Motter
In this session, we will review the similarities and differences between General Ledger in Enterprise and 3E. Beginning
PACIFIC BALLROOM 19
Progressing to 3E: How to Prepare Your Firm for a Successful Implementation
Presented by Daniel Martinez and La Vonne Maliga
The session will review how to prepare the data, staff and firm for a blueprint implementation. The data is better converted if cleaned up, the staff is better prepared if included, and the firm is better prepared if they are aware. Beginner
PACIFIC BALLROOM 21

11:30 am – 12:30 pm

Feature Comparative: UDFs
Presented by La Vonne Maliga and Stacey Lindahl
In this session, we will talk about how to handle User Defined Fields (UDFs) during your move to 3E. We’ll cover best practice considerations for looking at existing fields or creating custom fields in 3E – in addition to discussing how this impacts your conversion and template development.
PACIFIC BALLROOM 19

1:30 pm – 2:30 pm

Technical Comparative: Tables vs. Archetypes
Presented by Charles Zack and Sandeep Gupta
Join us as we compare the Enterprise data structures to 3E. You'll get an overview of the 3E data structure set and see how it differs from Enterprise. Advanced
PACIFIC BALLROOM 18

Feature Comparative: Conflicts
Presented by Michael Wright and Virginia Gleason
In this session we will review the similarities and differences between Conflicts in Enterprise and 3E.
PACIFIC BALLROOM 21

3:15 pm – 4:15 pm

Explore our Project Quality Model
Presented by Kim Vickerman and Jennifer Gatling
From small firms to global organizations, we have an implementation method for you! We will review the various methods developed by our staff to ensure a successful implementation for any size of firm. Beginner
PACIFIC BALLROOM 15

Feature Comparative: Taxes
Presented by Lyndsey Nations, Randolph Nairn, and Nadia Strobia
In this session, we will review the similarities and differences between tax functionality in Enterprise and 3E. Intermediate
PACIFIC BALLROOM 18

Enterprise to 3E Roundtable: Ask the Experts
Presented by La Vonne Maliga, Matt Jamma, and Terry Gibson
This session is intended for Enterprise customers that may be wondering, “How does 3E handle this scenario?” Bring your questions to this interactive session with a panel of Enterprise and 3E experts.
PACIFIC BALLROOM 19