



# EXTEND YOUR ADVANTAGE

ELITE USER CONFERENCE 2012

JUNE 26-28 ARIA, LAS VEGAS



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## SCHOLAR DAYS

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### HALF-DAY SESSIONS

**Monday, June 25 8:00 A.M. – 1:00 P.M.**

#### Enterprise – Batch Finalization

This class will provide in-depth coverage of the tools available in Elite Enterprise to identify and correct issues with Batch Finalization.

This interactive session will provide a detailed review and discussion of common and complex problems that are often addressed by support in the areas of time, cost, audit, bill, and credit finalization. Attendees will have time to ask questions on scenarios they may have encountered.

There will be reference throughout to different areas of the application such as VB options, Ledger Code Masking, and User Access and how they affect the finalization processes. Attendees will be presented with the tools necessary to identify and correct Batch Finalization issues through discussion, lecture, and hands-on use of the Elite Enterprise application.

#### Target Audience

Suitable for all attendees

#### Prerequisite

Some familiarity with the various Batch Finalization processes in Elite Enterprise and a basic understanding of the flow of masking will be helpful.

#### Goals and Objectives

- Gain a deep understanding of the Enterprise Batch Finalization processes and the issues that may arise
- Identify the tools to resolve commonly reported finalization issues, both simple and complex

#### Duration

4 Hours

#### 3E – Security

This intermediate level application training class will provide a thorough tutoring in 3E security. Detailed data level security will not be discussed in this class.

#### Target Audience

Users with a basic familiarity with 3E

#### Goals and Objectives

- Gain an overview of the security strategy, including which solution and why
- Review industry standards
- Discuss the basics of the Enterprise Security model and how it's been enhanced in 3E
- Learn about the 3E Security model (process, ACL, and data level)
- Discuss examples of security setups and configurations
- Obtain a demo of the security suite
- Discuss integrations and third party tools
- Q&A

#### Duration

4 Hours

#### 3E Masking

3E masking allows you to simultaneously post to multiple sets of books with different accounting methods for a single transaction. Gain an overview of how this powerful and flexible process lets you map your firm's Invoice Manager transactions to the general ledger. Explore the masking matrix, various masking options and setups, transaction types, cost types, and receipt types.

#### Target Audience

Firm accountants and administrators

#### Goals and Objectives

- Obtain a general understanding of how masking works in 3E
- Learn how the following features in 3E can impact the general ledger and how to set up and successfully manage their masking:
  - Transaction types
  - Operating units
  - Statutory books
  - Unit posting drivers
  - Non-billable masking
  - Masked override values
- Find out how to use the GL masking test

#### Duration

4 hours

## SCHOLAR DAYS

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### HALF-DAY SESSIONS

**Monday, June 25 8:00 A.M. – 1:00 P.M.**

#### 3E Notifications

This class will provide in-depth coverage of the Elite 3E Notifications and the processes that use them to run business object tasks and collection event tasks and how they can be used to enhance and customize Elite 3E. The 3E Notification Scheduler is a task scheduling tool that allows the user to automate custom business objects and tasks such as bill summary updates and collections steps. These tools include functionality that allows for the configuration and scheduling of notification e-mails that report the status of a scheduled task or event. The easy-to-use interface makes the setup and maintenance of the automated procedures simple and straightforward.

#### Target Audience

3E administrators, IT personnel, collection managers

#### Goals and Objectives

Obtain a general understanding of the following key components:

- Notification Task Manager
- Notification Event Distribution Manager
- Notification Task Log and Viewer
- Collection Events
- Notification Task Manager Business Object Task
- Notification Task Manager Event Task
- Notification Schedule
- Notification Dependent Condition List
- Scheduling
- Notification Mail Method
- Notification Start Task

#### Duration

4 hours

#### 3E Proforma Generation

Proformas are pre-bills that you can create to view the accumulated work in the billing system. Proformas can consist of basic matter information; a detailed listing of all unbilled time and costs; a history of all billings, collections, and/or trust activity for the matter; a summary of work performed by each timekeeper; an aged accounts receivable summary, etc. In 3E, time, cost, and charge records are gathered into a proforma using the Proforma Generation Process.

This class will provide in-depth instructions on generating the various types of proformas available in 3E. Attendees will learn ideas for preserving proforma criteria thus eliminating the need to duplicate efforts each month. Attendees will be able to create an ad hoc or generic Proforma Run to facilitate one time or special scenarios.

#### Target Audience

Billing specialists, accounting and billing managers, and supervisors

#### Goals and Objectives

- Obtain an overview of the Proforma Generation Process
- Learn about proforma status and other functionality checkboxes
- Review the following proforma features:
  - Date selections
  - Matter minimum
  - Date overrides
  - Proforma sorting options
  - Proforma template options
  - Proforma Generation framework options
  - Non-billable proforma

#### Duration

4 hours

## SCHOLAR DAYS

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### FULL-DAY SESSSIONS

**Friday, June 29 8:00 A.M. – 4:30 P.M.**

#### Enterprise – Framework Tools

This class will provide in-depth coverage of the Elite Enterprise Tools menu functions and how they can help enhance and customize the Enterprise experience for your users. The session will focus mainly on the functions that will impact the user interface, including Data Dictionary Manager, Message Manager, Label Preferences, Query Builder, Multi Query Builder, and Tree View Editor.

Error and log viewing will be covered to help users understand how the application tracks their actions and how the logs can be used to troubleshoot any issues a user may have. The session also will include a brief overview of the Options menu item to convey the importance it has on overall features and functions in various Enterprise applications. The session will include lecture, interactive discussions, and hands-on workshops.

#### Target Audience

Database administrators, directors, department managers and supervisors, and super users

#### Goals and Objectives

- Understand the key functions that affect the user interface, including Data Dictionary Manager, Message Manager, Label Preferences, Query Builder, Multi Query Builder, Multi query building, and Tree View Editor
- Explore the basics of logs, including location, activation, and troubleshooting
- Discuss key VB options

#### Duration

6 hours

#### Enterprise – Billing Highlights for Managers

This highly sought after class will provide financial managers and financial system support staff with a deeper understanding of Elite Enterprise Billing Manager. The class will enable participants to better manage their system and the processes that impact the data stored within for optimal results. The class is intended for those who need a deeper understanding of how billing system best practices are applied within a firm and how not adhering to them can impact the firm's management reporting processes. This class will not provide an introduction to Elite Enterprise. Guided lectures, group discussions, and training documentation will provide an interactive learning experience.

#### Target Audience

Financial managers, controllers, accounting managers, and financial system support staff that work with or manage others that use the billing modules within Elite Enterprise

#### Prerequisite

A working knowledge and understanding of the general concepts in Enterprise

#### Goals and Objectives

- Learn how key Elite Enterprise setups and processing impact both management and financial reporting
- Review the capabilities of precast from cost entry through loading of manual checks and learn how to identify and manage the process of correcting invalid entries
- Discuss the basics of billing rates with an emphasis on applying and managing exception rates
- Understand the impact that billing rate exceptions have on WIP, realization, and management reports
- Review the capabilities of Proforma Generation and Proforma Edit for timely and accurate bill processing
- Analyze the processing of billing adjustments and cash receipts and their impact on management reporting
- Gain an understanding of the various advanced billing methods available in Enterprise, including split, joint, and multi-payor billing, as well as, interim and flat fee billing
- Explore Enterprise standards reports and inquiries and learn how to leverage this valuable information

#### Duration

6 hours

## SCHOLAR DAYS

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### FULL-DAY SESSSIONS

**Friday, June 29 8:00 A.M. – 4:30 P.M.**

#### Enterprise – Database Structures

Gain an understanding of the Elite database structure, table relationships, and how to gather data. Learn how Billing Manager transactions move through the transaction tables and how they flow through to the summary tables and inqsnap views. Examine what tables hold this information and how these tables are linked together in Elite's Enterprise relational database. Basic SQL query techniques will be utilized to view data and reinforce the structure of the Elite Enterprise relational database.

##### Target Audience

Database administrators, billing managers, financial analysts, and super users

##### Goals and Objectives

- Identify the reference and transactional tables that make up the Elite Enterprise billing system.
- Understand the life cycle of transactions in the billing system
- Become familiar with the summary tables and their structure
- Gain basic SQL query knowledge to mine data from Elite Enterprise Billing Manager

##### Duration

6 Hours

#### Enterprise – VB Options

This class will provide in-depth coverage of the Elite Enterprise VB options settings and how they impact the various Enterprise modules.

The interactive session will focus on key areas of VB options with detailed review and discussion around all VB options in the areas of billing, imaging, precost, proforma edit, and payments. There also will be time to review the other VB options as part of an overview and interactive session, responding to specific requirements highlighted during the session. The session will include lecture, interactive discussion, and application demonstrations.

##### Target Audience

Enterprise administrators

##### Prerequisite

Attending participants will need to be administrators in the Elite Enterprise application. A basic understanding of VB options and how they affect the Enterprise application at different levels will be helpful to the attendee.

##### Goals and Objectives

- Gain a deep understanding of a wide variety of the available VB options and how they interact with the modules in the database
- Learn how VB options can be utilized to maximize functionality and control user processing

##### Duration

6 Hours

#### 3E – IDE Highlights

This class will provide an overview of the ELITE 3E Integrated Development Environment (IDE) Process Design. Using the IDE, IT professionals can configure both custom applications and existing 3E functionality to meet your firm's needs. Gain a breakdown and in-depth explanation of its functionality by Designer from Archetype through Process Designers.

Through overview lecture, demo, and hands-on workshop of the tool set involved in 3E Process Design, attendees will gain an explanation of the added value IDE can bring to their firm.

##### Target Audience

Firm staff involved with the customized functionality of the 3E Integrated Development Environment

##### Prerequisite

Some familiarity with relational databases, SQL, and Object-Oriented (OO) databases may be helpful.

##### Goals and Objectives

- Get specific instructor-led training on the functionality and key features of the IDE Process Design tool set
- Obtain hands-on experience with each designer (Archetype through Process) module of the IDE as well as receive documentation on those features that do not require in-depth review

##### Duration

6 Hours

## SCHOLAR DAYS

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### FULL-DAY SESSSIONS

**Friday, June 29 8:00 A.M. – 4:30 P.M.**

#### 3E General Ledger Balancing

This in-depth course will guide participants through the process of 3E sub-ledger to General Ledger balancing using the 3E Balancing Spreadsheet Metric. Learn how to validate GL postings in all posting currencies against effective dated records. Explore how to configure, execute, and analyze the results of the Balancing Spreadsheet Metric. This session will include lecture, interactive discussions, and hands-on workshops.

##### Target Audience

Users involved in the month-end close and reconciliation process and who have a basic familiarity with 3E

##### Prerequisite

This class does not provide a detailed review of the month-end closing process. To become familiar with the month-end closing process, participants are encouraged to attend the Explore the Month-end Closing Process in 3E tutorial.

##### Goals and Objectives

- Understand the concepts behind 3E sub-ledger to GL balancing utilizing the Balancing Spreadsheet Metric
- Learn how to perform sub-ledger to GL reconciliations utilizing the Balancing Spreadsheet Metric
- Learn how to configure the Balancing Spreadsheet Metric to support 3E billing system masking
- Configure the Balancing Spreadsheet Metric using the Balancing Spreadsheet Configuration Matrix
- Gain a comfort level analyzing the output from the Balancing Spreadsheet Metric
- Understand where these steps fit into the month-end closing process

##### Duration

6 Hours

#### 3E – Advanced Billing Topics

Maximize the power and flexibility of your 3E Invoice Management software with 3E advanced billing features. This class will provide in-depth coverage of several 3E billing features and how they can enhance the end user experience. Attendees will learn the matter setups and transaction how's and why's and will review account postings related to 3E's advanced billing options. The session will include lecture, interactive discussions, and hands-on workshops.

##### Target Audience

Financial managers, controllers, accounting managers, and financial system support staff that work with or manage others that use the financial modules within ELITE 3E

##### Goals and Objectives

- Gain an overview and in-depth understanding of key advanced billing features in 3E, including flat fee billing, exact amount billing, purges and purge types, split billing, multi-layer, multi-payor, volume discounts, proforma adjustments, and billing groups

##### Duration

6 Hours

#### 3E – Reports and Metrics

This in-depth application and technical training class will provide an intensive exploration of how your firm can use 3E Reports and Metrics. Gain an understanding of the tools, information, and components necessary to plan and develop your firm's reporting strategy. The session will include lecture, interactive discussions, hands-on workshops, and retention exercises.

##### Target Audience

Finance managers, IT managers, finance users, and application specialists

##### Goals and Objectives

- Gain an overview of stock reports, 3E standard reports, and report features
- Obtain an metrics overview highlighting metric layouts, metric scheduling, metric retention, and metric table "housekeeping"
- Discuss 3E and IDE Report Design features
- Review information delivery concepts
- Participate in a reports and metrics workshop

##### Duration

6 Hours

## SCHOLAR DAYS

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### FULL-DAY SESSSIONS

**Friday, June 29 8:00 A.M. – 4:30 P.M.**

#### **MatterSphere Developers Workshop**

This class will introduce you to the functionality of MatterSphere and how it can be extended to enhance the legal front office, from data capture to document production.

We will provide an overview of the developer tools available in the MatterSphere SDK. With a good SDK knowledge, developers can extend MatterSphere functionality and create custom functionality to meet the needs of your front office users. All of this is done from a familiar Visual Studio-like interface, with C# and VB.Net at your fingertips for even more control.

This course will include lecture, interactive discussions, and hands-on workshops.

#### **Target Audience**

Business analysts and developers interested in learning more about expanding MatterSphere to meet your firm's needs

#### **Prerequisite**

Familiarity with databases, programming language, SQL, and Microsoft Office

#### **Goals and Objectives**

- Obtain a developer overview, including SQL Server schema, FWBS framework, and configurable types
- Learn about the SDK, including extended data, screen design, and external data source
- Explore how to capture data
- Learn about document production using captured data in Word documents and emails, conditional processing of fields in Word, and scripted fields in Word and email
- Discuss task flow, including process-driven task management
- Review the MatterSphere Portal, including time keeper portal and client portal, and discuss adding data capture to the MatterSphere portal

#### **Duration**

6 Hours