

ELITE®



EXTEND YOUR ADVANTAGE

ELITE USER CONFERENCE 2012

JUNE 26-28 ARIA, LAS VEGAS



2012 ELITE USER CONFERENCE

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ENTERPRISE USERS – TUTORIALS

TUESDAY, JUNE 26, 2012

9:45 A.M. – 11:45 A.M.

Extend for Advanced Users

Presented by Matt Jamma and Saar Karni

Discover the extensive customization capabilities of Extend and learn to tailor Extend events to your firm's particular needs. Learn about the new administrator's panel and examine how to customize standard events with predefined settings and create custom events by modifying standard fields, adding tables and fields, and making format and layout changes. Client insights and experiences will be shared.

 Suitable for all attendees with basic knowledge of the subject matter

BRISTLECONE BALLROOM 7

The Top 10 Best Enterprise System Settings

Presented by Dennis Marshall

What are the top 10 system settings in Enterprise? Join us as we review the best settings and how they can transform your firm.

 Suitable for all attendees

BRISTLECONE BALLROOM 8

Basic Enterprise Database Table Relationships

Presented by Charles Zack and Justin Bortnicker

Gain an understanding of the Elite Database Structure. Learn how basic Enterprise 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 basic information and how these basic tables are linked together in Elite Enterprise's relational database. This is a recommended prerequisite to the Enterprise Database Scholar Day as well as the Designing Custom Reports using Crystal Reports tutorial.

 Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 9

Using WebView Proforma Generation and Edit

Presented by Mike Wright

This popular tutorial is back! Join us for an in-depth look at the features and functionality of WebView Proforma Generation and Edit. Discover the different ways this important work can be distributed throughout the firm. This tutorial will include a demo as well as discussion on setup and rollout from a client perspective.

 Suitable for all attendees

BRISTLECONE BALLROOM 10

TUESDAY, JUNE 26, 2012

12:45 P.M. – 2:45 P.M.

Image Connect Made Easy

Presented by Chris Keithley

Need assistance with your Image Connect setups? This tutorial will walk you through all the proper setups to get your imaging system running smoothly and efficiently.

 Suitable for all attendees

BRISTLECONE BALLROOM 7

Limit Your Exposure with Enterprise and WebView Security Features

Presented by Matt Jamma and Heidi Fedler

Review Enterprise and WebView security features. Discuss how to control and simplify complex access requirements through advanced user access settings, including settings by group and usage variables, validation filters, reporting groups, proforma access list, operating unit security, and other options.

 Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 8

Learn How to Customize Your System with VBA Scripting

Presented by Avneet Sahni

Explore the benefits of using Visual Basic for Applications to extend the functionality of the Elite Enterprise applications. The focus will be on building customizations using the VBA toolset.

 Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 9

Designing Custom Reports Using Crystal Reports

Presented by Charles Zack and Val Brady

Learn the basics of custom report design using Crystal Reports Designer. Learn how to modify existing reports and develop new reports and implement them in your Enterprise environment. The prerequisite for this tutorial is the Basic Enterprise Database Table Relationships tutorial

 Suitable for all attendees

BRISTLECONE BALLROOM 10

ENTERPRISE USERS – TUTORIALS

TUESDAY, JUNE 26, 2012

3:00 P.M. – 5:00 P.M.

Best Practices for Enterprise Billing**Presented by Clare Denby**

Are you using Enterprise Billing Manager in the most efficient way possible for your firm? Learn the best practices for this critical part of your business. We will discuss the new integration with BankCard Services Worldwide which allows your firm to take credit cards from clients, reducing the days outstanding for cash collection and increasing your cash flow.

i Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 7

WebView Deployment and Personalization Primer**Presented by Matt Jamma**

Did your firm deploy WebView a while ago? Join us for a review of the sample deployment plans as well as a deep dive of WebView VB options. Learn all of the WebView options that allow you to personalize your users' experience. Learn WebView specific month-end best practices as well as how to restrict time entry, proforma edit changes, and expense entry.

i Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 8

Enterprise Balancing**Presented by Maggie Martello and Rick Sessa**

This tutorial will focus on the Balancing of Billing Reports vs. Billing Reports and Billing Reports vs. GL and will include information on how to run reports, collect data, and complete required worksheets. We will also discuss tips and tricks to resolve balancing issues as well as provide time for questions and answers.

i Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 9

Getting Your Laterals Working Faster**Presented by Charles Zack**

In this tutorial learn how to use standard Enterprise load files to bring in lateral hire clients, matters, and related parties as well as perform conflicts searches and make on-boarding easier. This tutorial will include a demo.

i Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 10

WEDNESDAY, JUNE 27, 2012

8:45 A.M. – 10:15 A.M.

Task-based Billing from Soup to Nuts**Presented by Heidi Fedler**

Need to add task and activity codes to your time and cost records? Learn which format(s) to use for loading and how to complete them properly. Explore how to efficiently use task codes with user defined fields (UDFs). Learn how to implement a task-based billing system to streamline tracking, reporting, and analyzing billing data.

i Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 7

Enterprise Environment Care and Feeding**Presented by Tim Gerrity**

Like a thoroughbred, Enterprise needs proper feed and care to perform at its best. Find out what you can do to give Enterprise the best care possible, including scheduling tasks, backups, copies, etc.

i Suitable for technical professionals

BRISTLECONE BALLROOM 8

Industry Trends in Alternative Fee Arrangements**Presented by Dan O'Day**

Alternative billing arrangements are here to stay. Gain a high-level overview of the considerations a law firm faces when selling, staffing, and billing for an alternative fee arrangement. Explore many examples of such fee arrangements, including collaboration between clients and law firms. Immediately following this presentation will be two additional tutorials: Alternative Fee Arrangements in 3E and Alternative Fee Arrangements in Enterprise which will explore the specifics of setting up and managing these arrangements in the Elite systems.

i Suitable for all attendees

BRISTLECONE BALLROOM 9

Check Templates**Presented by Nancy Agpaoa and Rick Sessa**

This tutorial will provide an overview of the most common issues concerning check templates and how to make minimal design changes. We will discuss duplex printing, check printer setup, paper source direction, check description, and comment modifications as well as how to create and set up trust check templates.

i Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 10

ENTERPRISE USERS – TUTORIALS

WEDNESDAY, JUNE 27, 2012

8:45 A.M. – 10:15 A.M. (Con't)

Gallery of Features for Enterprise Practice Management 3.6 to 3.9

Presented by Mark Leavitt and Patti Goettel

Review some of the more important and impactful Enterprise Conflicts and Records features from releases 3.6 to 3.9. But wait, there's more. As an added bonus get a sneak peek at several of the features coming in 3.10. This tutorial will include demonstrations.

 Suitable for all attendees

BLUETHORN 11

WEDNESDAY, JUNE 27, 2012

10:45 A.M. – 12:15 P.M.

Gallery of Enterprise 3.6 to 3.9 Financial Features

Presented by Deb West and Patti Goettel

Review some of the more important and impactful Billing and Accounts Payable/General Ledger features from Enterprise releases 3.5 to 3.9. But wait, there's more. As an added bonus get a sneak peek at several of the features coming in 3.10. This tutorial will include demonstrations.

 Suitable for all attendees

BRISTLECONE BALLROOM 7

Using Bank Reconciliation and Bank Statement Handler to Optimize Enterprise

Presented by Simon Perry

Are you taking advantage of these modules in Enterprise to save you significant man hours per month, as well as provide better accuracy and consistency? Learn how to do bank reconciliations for both firm and client/trust accounts within the software and explore the latest features that make this process even simpler and more efficient. Find out how these features helped one client streamline their processes.

 Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 8

Alternative Fee Arrangements in Enterprise

Presented by Heidi Fedler

Today's economy requires a firm to be more creative with their billing rates. Immediately following the Industry Trends in Alternative Fee Arrangements tutorial, which will discuss general trends in the legal industry regarding AFAs, this tutorial will provide an in-depth discussion on how to use flat fee billing in Enterprise and how to set up various flat fee rate structures to achieve these new creative billing rates.

 Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 9

Enterprise Reporting Functionality and Favorite Reports

Presented by Dennis Marshall

What are our favorite reports at Elite? We'll show you in this tutorial as well as explore standard Enterprise reporting functions, including the Reports & Queues menu, Report Manager, and Data Warehousing.

 Suitable for all attendees

BRISTLECONE BALLROOM 10

Choices, Choices, Choices: WebView Time Entry

Presented by Mike Wright

What are the differences between unassigned and suspense time, and in what types of batches do they go? How do you report on them? What is the difference between Weekly, Weekly Grid, and Direct Time Entry? What about Timers, and what is "always on top" functionality? Find out the answers to these compelling questions as well as others in this tutorial.

 Suitable for all attendees

PINYON BALLROOM 1

ENTERPRISE USERS – SESSIONS

WEDNESDAY, JUNE 27, 2012

2:00 P.M. – 3:00 P.M.

Enterprise Roadmap

Presented by Justin Farmer and Patti Goettel

Join us as the Product Management team discusses the future direction of Enterprise.

 Suitable for all attendees

BRISTLECONE BALLROOM 7

Optimize Elite Conflicts Manager

Presented by Mark Leavitt

This back-to-basics primer will explore effective policies to optimize your usage and understanding of Enterprise Conflicts Manager. In addition, we will discuss some of the newer enhancements and how they can be used to achieve full optimization.

 Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 8

Year-end Checklist, Reboot 2012

Presented by Nancy Agpaoa and Esther Davis

It's June and do you know where your year-end checklist is? No need to look for it, because this session will discuss common considerations when preparing for fiscal year end. Gain an overview of balancing, reporting, closing, and 1099s setup and preparation.

 Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 9

A Look into eBillingHub's Data Warehouse – Present Practices and Future Trends

Presented by Carlos Seoane

Over the past eight years, eBillingHub has processed more electronic invoices than any other company in the industry. Our anonymized data provides a unique look into the practice of e-billing, including common issues, obstacles, and future trends.

 Suitable for all attendees

BRISTLECONE BALLROOM 10

Find Out About Engage

Presented by Nathan Bowie

Join us for an exciting look at the features and functionality of Engage. Learn how Engage will help your firm increase profitability while becoming more transparent to your clients.

 Suitable for all attendees

PINYON BALLROOM 1

Increase Revenue, Streamline Finance Processes, and Extend Elite 3E and Elite Enterprise with Automated Time Capture

Presented by Eldean Ward, IntApp

Manual time entry no longer meets the needs of lawyers and firms. Overlooked activity, inefficient tracking and billing processes, and poor user experience all call for a fresh approach. Today, firms are adopting time capture software that integrates directly with Elite 3E and Elite Enterprise. It automates activity tracking, classification, and grouping, so lawyers can easily review and submit billable activity. This delivers significant value across the firm. Attend this session to hear firsthand case studies of this new approach.

 Suitable for all attendees

BLUETHORN 11

ENTERPRISE USERS – SESSIONS

WEDNESDAY, JUNE 27, 2012

3:30 P.M. – 4:30 P.M.

Document Studio vs. Design Gallery**Presented by Jason Taylor**

This session will provide an overview of Document Studio and Design Gallery, the product roadmaps for both, and a discussion on how they differ. Key reasons why firms may consider making the switch to Design Gallery will be presented.

f Suitable for all attendees

BRISTLECONE BALLROOM 7

Voucher and Check Approval**Presented by Sheila Hagen**

Tired of running around the office to get approvals for vouchers or payments? This session will provide a detailed review of the voucher and check approval process with embedded workflow, including setups and solutions for common issues.

f Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 8

Enterprise Reporting Analytics Foundation and Reporting Essentials Roadmap**Presented by Milan Bobde**

Learn about the current releases of the Business Intelligence product line and the future of these products. A demonstration of how the industry uses these products will be provided.

f Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 9

8 Essential Expense Controls Used by Top AmLaw Firms**Presented by Dave Terry and Anne Becknell, Chrome River Technologies**

Attend this enlightening discussion with Elite customers on essential expense controls and best practices in invoice and expense reporting workflow used by half of the AmLaw 100. Hear how they tackled cost control issues through new services and best practices that saved time and money. Learn how they are improving AP business processes while improving employee satisfaction. Hear what they are using to create and enforce spend policies that provide more consistency for client billings and greater visibility into employee spend practices, ultimately reducing costs and improving their bottom line.

f Suitable for all attendees

BLUETHORN 11

Leverage the Power of Your Elite Solution**Presented by Dennis Marshall**

Discover how the ever-evolving Elite Process Review can help you get the most out of your existing systems. In today's economy, it is more important than ever to leverage your investment in Elite more effectively. We will discuss the various business goals achieved by firms that undertake Elite Process Reviews. Learn about the planning steps involved, the format and focus of onsite discovery sessions, and the Action List Report and Findings Summary deliverables.

f Suitable for firm administrators

BRISTLECONE BALLROOM 10

The Exciting World of Elite Mobile**Presented by Justin Farmer and Mike Walker**

The future is now! Find out about the latest trends in mobile and how Elite is implementing these trends across Elite's many product lines. Learn how mobile can transform your firm and improve productivity. This session will give you a glimpse of what is possible.

f Suitable for all attendees

PINYON BALLROOM 1

Contact Management with Hubbard One**Presented by Rob Saccone**

Looking for a better way to manage your firm's client relationships? Come and see how Contact Manager and ContactNet are paving the way for better client management and how these products can be integrated with Enterprise and 3E.

f Suitable for all attendees

PINYON BALLROOM 3

Elite Education Services: Software Education Services Overview**Presented by Daniel Martinez and Kerry Vandermolen**

Please join us for an overview of our newest client global services department – Elite Education Services. This team is dedicated to providing high quality training to support your business processes and help maximize your investment in Elite software. Our qualified trainers have the expertise to meet individual learning needs and programs that focus on the function of Elite's products from both an application and technical end user perspective. Education Services provides an extensive curriculum of education courses, offered in a wide variety of training environments in support of your day-to-day operations and success with Elite software.

f Suitable for all attendees

PINYON BALLROOM 8

ENTERPRISE USERS – SESSIONS

WEDNESDAY, JUNE 27, 2012

4:45 P.M. – 5:45 P.M.

Best Practices for Enterprise AP/GL

Presented by Dennis Marshall

Extend your efficiency by utilizing the best practices in the AP/GL system. Can your month end be faster or your balancing easier? Are you using inquiry to its fullest advantage? Are you controlling postings and using our built-in voucher and check approvals? Discover best practices to help improve your day.

 Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 7

Conflicts Reporting with Data Transformation Services

Presented by Mark Beaman

Learn how the Data Transformation team can design meaningful conflicts reports to meet the needs of your firm.

 Suitable for all attendees

BRISTLECONE BALLROOM 8

Paperless Proforma

Presented by Jason Taylor

Come see the newly re-designed Paperless Proforma (version 4.0). Learn how to successfully implement paperless at your firm to achieve high adoption rates.

 Suitable for all attendees

BRISTLECONE BALLROOM 9

The Intersection of Finance and the Practice of Law

Presented by Nathan Bowie and Munger Tolles, Finnegan, Dorsey

Thomson Reuters Engage is the first comprehensive Engagement Planning & Management (EPM) software tool that enables law firms to create, monitor, and manage integrated budgets and work plans for matters and portfolios of matters. Find out how to win new business and ensure matter profitability through three different approaches to using Engage for precision matter budgeting and legal project management.

 Suitable for all attendees

BRISTLECONE BALLROOM 10

OneView, OneView Foundation, and Elite

Presented by Rob Saccone

Learn how OneView and OneView Foundation can present and transform Elite data and data from various firm sources in SharePoint.

 Suitable for all attendees

PINYON BALLROOM 3

Extending Elite 3E and Elite Enterprise with Intelligent Integration and New Data Management Strategies

Presented by Norm Mullock, IntApp

Hear firsthand case studies of how firms are leveraging new integration approaches to address common process challenges, including pre-cost information management, timekeeper account creation, new business intake, and lawyer time entry validation, as well as common data import tasks, including importing budget loads, currency loads, and rate loads into the general ledger. Learn how connecting information from other business systems with Elite can deliver valuable management- and lawyer-facing alerts and event-driven reports.

 Suitable for all attendees

BLUETHORN 11

ENTERPRISE USERS – SESSIONS

THURSDAY JUNE 28, 2012

8:15 A.M. – 9:15 A.M.

Advanced AP/GL Features

Presented by Esther Davis and Sheila Hagen

Join us for this detailed review of some of the more advanced features of Accounts Payable and General Ledger (Financial Management System) in Enterprise.

 Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 7

Enterprise Customization Review

Presented by Charles Zack and Val Brady

Learn how Enterprise can be customized by reviewing several popular built-in features. We will identify standard functionality versus custom, and we will discuss the impact of upgrades.

 Suitable for firm administrators or managers

BRISTLECONE BALLROOM 8

Gallery of Features: WebView 5.3 and 5.4

Presented by Mike Wright and Patti Goettel

Review some of the more important and impactful WebView features from releases 5.3 and 5.4. But wait, there's more. As an added bonus, get a sneak peek at several of the features coming in 5.5. This session will include demonstrations.

 Suitable for all attendees

BRISTLECONE BALLROOM 9

Discover How eBillingHub Can Streamline the Billing Process

Presented by Ryan Ladisic

e-billing is here to stay and is becoming more and more popular with corporate clients, and for very good reason: it vastly improves productivity across companies. This session will explore the standard flow of the billing process and show you how eBillingHub, fully integrated with Elite Enterprise and 3E, addresses the areas where firms face the greatest challenges in executing their electronic bills.

 Suitable for all attendees

BRISTLECONE BALLROOM 10

Introduction to MatterSphere

Presented by Liam Wright and Peter Barnett

Learn how MatterSphere, Elite's exciting new matter management product with more than 200 clients in the UK and Australia, will make your lawyers more efficient, regardless of practice area or geography.

 Suitable for all attendees

PINYON BALLROOM 1

A Plethora of Reporting Solutions

Presented by Milan Bobde and Justin Farmer

Hands down, Elite has a lot of reporting solutions. Join us for this session as we provide an overview of each reporting solution, its targeted product/module/business drivers, and the benefits each provides. We will also provide guidelines to help you determine what is best for your firm.

 Suitable for all attendees

PINYON BALLROOM 2

Effective Project Management for Your Project Large and Small

Presented by Jane Threkheld and Dana Clifford, Source Consulting Group

Effective project management is critical to the success of any project large or small. This is even more important for your firm's financial system projects which have a major impact on your firm's operations. Learn key techniques and tools you can apply to your firm's projects to ensure success, including effective project resource management, project financial management, and project time line management.

 Suitable for all attendees

BLUETHORN 11

ENTERPRISE USERS – SESSIONS

THURSDAY, JUNE 28, 2012

9:30 A.M. – 10:30 A.M.

Data Extraction Using Billing Inquiry**Presented by Matt Jamma**

Discover important techniques for mining data in Enterprise Billing Inquiry. Learn how to identify standard reports based on topic or need. Learn useful tips and tricks to more efficiently get the data you need.

i Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 7

Elite's Knowledge Resources**Presented by Ken Boultinghouse and Dan Wesol**

Learn how you can use the Elite Knowledge Base and documentation sets to more effectively find and use information at your firm. This session will review the available resources and discuss how to access and use them.

i Suitable for all attendees

BRISTLECONE BALLROOM 8

Learn About New Features Available within eBillingHub**Presented by Christopher Danaher and Jessica Kutrufis**

Join us as we demonstrate recently added eBillingHub tools designed to further streamline the billing process. Explore improvements such as new editing options, cost backups, validating timekeepers prior to generating invoices, and more.

i Suitable for all attendees

BRISTLECONE BALLROOM 10

Document Assembly with MatterSphere**Presented by Liam Wright and Nic Aiken**

This session will provide an in-depth look at the many functions that support document assembly.

i Suitable for all attendees

PINYON BALLROOM 1

Staying Current – Banking Regulations and International Payment Processing for Professional Services Firms**Presented by Anthony F. Loiacono, Jr., Global Exchange Group**

This session will focus on the ever-changing world of international payments for professional services firms, including foreign exchange and the economy; BSA and Patriot Act updated regulations; foreign invoices, data processing,

imaging, storage, and image retrieval; foreign associate and vendor relations; and ONEStep Elite® integration. As a leading source in bank-operated international payment solutions, Global Exchange makes foreign payments and Elite integration easier, safer, and more efficient. Join us as we explore why over 40% of AmLaw 200 firms have selected Global Exchange as their international payments provider.

i Suitable for all attendees

BLUETHORN 11

THURSDAY, JUNE 28, 2012

11:00 A.M. – 12:00 P.M.

Clarity Financial Reporter, Elite's New Offering for Financial Reporting**Presented by Corey Bidmead, Clarity Systems**

Explore the new financial reporting capabilities in the Enterprise world with an introduction to Clarity.

i Suitable for all attendees

BRISTLECONE BALLROOM 7

EGR Best Practices**Presented by Dennis Marshall**

See how other firms are using Elite's Global Release and the benefits they are getting out of it.

i Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 8

Business Process Management: New Business Intake ... and Beyond**Presented by Mary Weatherbee, K&L Gates LLP**

What processes are law firms automating, and why is workflow more important now than ever? With a close eye on operational costs and risk management, law firms are investing in workflow technologies to eliminate redundancies, alleviate administrative burdens, and promote shorter business cycles. This session will highlight the benefits and challenges facing process automation and will discuss workflow trends surfacing among firms today. By exploring New Business Intake and beyond, learn how leveraging business process management solutions can enhance the way your firm manages risk, data, and operations.

i Suitable for all attendees

BRISTLECONE BALLROOM 10

ENTERPRISE USERS – SESSIONS

THURSDAY, JUNE 28, 2012

1:00 P.M. – 2:00 P.M.

Image Connect**Presented by Brad Kahnamoui, Janis Gaston, and Matt Jamma**

Image Connect, Elite's standalone imaging application, is a .NET Web-based product that enables automatic association of images with transactions. It features batch scanning and processing of hard copy documents into PDF and TIFF images. Image Connect integrates with Elite Enterprise, ELITE 3E, GEAC, and any other .NET Web-based application using its Web Services. See demonstrations of how Image Connect works with both Enterprise and 3E and learn how one client transformed their business using it.

 Suitable for all attendees

BRISTLECONE BALLROOM 8

AP/GL Inquiry: Inquiring Minds Want to Know**Presented by Sheila Hagen**

See how easy it is to get information for a payment query or how GL Inquiry can be leveraged to help balance a GL account. Join us for this detailed review of where data is used/procured for use in the AP and GL inquiry screens in summary and detail modes. Follow how transactions post and how voids, reversals, and date sensitive items are presented in inquiry.

 Suitable for attendees with a basic understanding of subject matter

BRISTLECONE BALLROOM 9

Introducing ClientPay® for Elite®**Presented by Jay Bruber, Vince Arnoldi, and Ryan Beck, BankCard Services Worldwide**

Learn how ClientPay for Elite turns credit and debit card payment acceptance from an error-prone and time-intensive task into an efficient, accurate, and cost-saving process. We'll demonstrate how this new, integrated payment solution for the Enterprise platform reduces the amount of time and effort required to accept and process payments, update accounts receivable, and disperse funds to both operating and trust accounts. Presented by BankCard Services Worldwide, Elite's integration partner for payment processing solutions.

 Suitable for all attendees

PINYON BALLROOM 6

THURSDAY, JUNE 28, 2012

2:45 P.M. – 3:45 P.M.

Our Favorite Enterprise Features**Moderated by Julia Koski**

We've put a new twist on an old favorite. This time around a panel of Elite Subject Matter Experts from various areas of the company will talk about their favorite features and the benefits those features offer.

 Suitable for all attendees

BRISTLECONE BALLROOM 7

eBillingHub Roundtable Discussion**Moderated by Christopher Danaheer**

Hear what people are saying about eBillingHub. Make your voice heard about the features that you like or features that you would like to see in the future. Share with and learn from eBillingHub users who have the answers to your questions.

 Suitable for all attendees

BRISTLECONE BALLROOM 9

Virtualization with Elite**Presented by Maurice Meezs and Bimal Dave**

Learn how to best configure a virtualized environment for optimum performance of either Enterprise or 3E. Find out Elite's policy and recommendations for implementation.

 Suitable for technical professionals

BRISTLECONE BALLROOM 10

3E FOR ENTERPRISE USERS – TUTORIALS

The following tutorials are specifically designed for those firms moving or considering a move to 3E.

TUESDAY, JUNE 26, 2012

9:45 A.M. – 11:45 A.M.

Introduction to 3E for Enterprise Users

Presented by Janis Gaston and Graham Mills

Learn about the world of 3E. We will demonstrate the new platform look and feel as well as the highlights of functionality.

 Suitable for all attendees

PINYON BALLROOM 1

WEDNESDAY, JUNE 27, 2012

10:45 A.M. – 12:15 P.M.

One Firm's Journey: Enterprise to 3E with MatterSphere

Presented by Nic Aiken and Andrew Powell, Nabarro

Learn how one firm made the transition from Enterprise to 3E and at the same time introduced MatterSphere.

 Suitable for all attendees

PINYON BALLROOM 8

3E FOR ENTERPRISE USERS – SESSIONS

The following sessions are specifically designed for those firms moving to or considering a move to 3E.

WEDNESDAY, JUNE 27, 2012

3:30 P.M. – 4:30 P.M.

Our Favorite 3E Features

Moderated by Mike Rose

Join us as subject matter experts across Elite demonstrate and discuss their favorite features, why they are important, and how you can use these features in your firm.

f Suitable for all attendees

PINYON BALLROOM 2

WEDNESDAY, JUNE 27, 2012

4:45 P.M. – 5:45 P.M.

Did You Know?

Presented by Jay Maclean

You've attended the Our Favorite 3E Features session and maybe some other sessions that discussed some of the more high profile features in 3E. Now join us as we review some of the great time-saving and shortcut features in 3E.

f Suitable for all attendees

PINYON BALLROOM 6

THURSDAY, JUNE 28, 2012

9:30 A.M. – 10:30 A.M.

Technical Strategy and Administration for Implementing 3E

Presented by Scott Strachan and Maurice Meezs

Learn the key technical details and standard tasks that will help your IT staff formulate strategies to implement 3E. An overview of the 3E framework, system requirements, and customization and applications integration methodologies will be presented.

f Suitable for technical professionals, project managers or firm administrators

BRISTLECONE BALLROOM 10

THURSDAY, JUNE 28, 2012

11:00 A.M. – 12:00 P.M.

Moving Your Data from Enterprise to 3E

Presented by Ken MacDonald

Just like packing and moving from one house to another, the best moves are those moves where preparations are made in advance. Find out different strategies and preparations for moving your firm's data from Enterprise to 3E.

f Suitable for technical professionals, project managers or firm administrators

PINYON BALLROOM 9

THURSDAY, JUNE 28, 2012

1:00 P.M. – 2:00 P.M.

Best Practices for Implementing 3E

Presented by Rob Beisswenger and Barbara Shane Jackson, Sullivans

This case study is geared towards clients who are preparing to implement or are considering implementing 3E. We will discuss how Sullivans was implemented under Elite's new PQM methodology which reduces the time between the start of the implementation and go live.

f Suitable for technical professionals, project managers or firm administrators

BRISTLECONE BALLROOM 7

3E USERS – TUTORIALS

TUESDAY, JUNE 26, 2012

9:45 A.M. – 11:45 A.M.

3E Indirect Taxes and Tax Reporting

Presented by Andrew Dutton

Explore 3E flexible tax setups that support indirect taxes (e.g. VAT, GST, etc.) Look at different country specific tax scenarios and how they can be practically and seamlessly managed in 3E. Discover the indirect tax reports and discover 3E's integrated tax clearing functionality for end-of-period tax management and reconciliation to GL. This session will include a product demo.

i Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 2

3E Dashboards and Reporting Fundamentals

Presented by Jay Maclean and Elena Miro

Gain an understanding of how to use 3E's reports, metrics, and inquiries to quickly obtain statistical data. More advanced functionality such as defining 3E roles and assigning those roles to information dashboards and reporting dashboards will be demonstrated. We will share examples of custom Matter and Fee Earner Dashboards created for Key Performance Indicators (KPI).

i Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 3

3E GL Overview

3E's General Ledger provides firm management quick access to critical financial information. Whether your firm operates in one currency or multiple currencies learn how different setup options support these various configurations. This session will review some of the General Ledger features, reports, and metrics.

i Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 6

3E Billing – Work-to-Cash Cycle

Presented by Cheng Kwee Chua and Betsy Esquivel

Explore an overview of the 3E Invoice Management process taking the life of a transaction from time worked through proforma, bill generation, and cash receipt. Learn techniques of how 3E can help a firm streamline the process to get the bill out faster to increase cash in.

i Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 7

The Ins and Outs of Multi-currency

Presented by Simon Jarrett

Explore 3E's integral approach for multi-currency processing. From maintaining multi-currency billing rates to posting a single transaction in multiple books, this session will explore the integrated multi-currency capabilities in 3E. A client will share their firm's experience in using the 3E multi-currency processing.

i Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 8

TUESDAY, JUNE 26, 2012

12:45 P.M. – 2:45 P.M.

3E System Care and Feeding

Presented by Maurice Meezs and Scott Strachan

What is the right formula for making sure your 3E system is running just right? Find out in this tutorial as we discuss the proper system maintenance, metric retention, and task scheduling. We will provide an overview of the Utilities 3E that you can use at your firm to successfully manage 3E. In addition, be sure to attend the Utilities 3E tutorial which will provide detailed information about these valuable tools.

i Suitable for technical professionals with a basic understanding of the subject matter

PINYON BALLROOM 1

3E Masking

Presented by Rhonda Compher and Lisa Brown

Gain an understanding of how masking in 3E works. Review the masking matrix and the various masking options to better understand how you can map your firm's Invoice Manager transactions to the general ledger. Explore transaction types, cost types, and receipt types to understand how each is used in 3E's powerful yet flexible masking setups.

i Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 2

The Best New Features for 3E Invoice Management

Presented by Laura Bengford and Clare Denby

Join us for a demo and a discussion of some of the best new features for managing your bills in 3E, including Multi-layer, Multi-payor, Entity Sites and Names, Matter Interest Calculator, and Proforma Scheduler.

i Suitable for all attendees

PINYON BALLROOM 3

3E USERS – TUTORIALS

TUESDAY, JUNE 26, 2012

12:45 P.M. – 2:45 P.M. (Con't)

Report Design and Development in the IDE

Presented by Jay Maclean and Elena Miro

Learn how to use the 3E Integrated Development Environment Report Designer tool to create new or customize native reports to fit your firm perfectly. Join us to see how some minor changes can open a whole new level of detail for your power users or how a single summary report can be filtered for a specific user.

f Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 6

Transforming Your Firm by Using the 3E Purchase-to-Pay Cycle

Presented by Deb West

Learn how the 3E Accounts Payable and Purchasing systems work in conjunction to handle the entire cycle from the point a user enters a requisition, to when the firm reconciles the bank account on which the vendor was paid. Join us for an in-depth look at the various steps and processes in this cycle and how these processes can automate your firm's current manual processes.

f Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 7

TUESDAY, JUNE 26, 2012

3:00 P.M. – 5:00 P.M.

Utilities 3E

Presented by Alan Taylor and Brad Reaves

Join us as we introduce our Utilities 3E standalone program. Utilities 3E is developer software that offers a suite of functionality that firms can use to help manage and maintain 3E. These are developer level tools and should be used with the utmost caution. This tutorial is recommended for advanced administrators/developers.

f Suitable for technical professionals or firm administrators

PINYON BALLROOM 1

Using Clarity – Your Reporting Solution for 3E

Presented by Corey Bidmead, Clarity Systems

This in-depth tutorial will demonstrate how to develop reports using Clarity as well as how to use the Clarity Reports software.

f Suitable for all attendees

PINYON BALLROOM 2

Explore the Month-end Closing Process in 3E

Presented by Karen Jakes

Learn about the vital components that are required to conduct a successful closing, review the month-end checklist, and examine the month-end dashboard. This presentation will feature a product demo. This is a high level summary tutorial. Attendees wanting in-depth training should sign up and attend the 3E Masking Scholar Day.

f Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 3

3E Billing Utilities

Presented by Simon Jarrett

What are the 3E Billing Utilities and how can they help you manage your firm's data? Find out what happens behind the scenes when these utilities are run and how they can simplify the management of your invoice processing.

f Suitable for all attendees

PINYON BALLROOM 6

3E USERS – TUTORIALS

WEDNESDAY, JUNE 27, 2012

8:45 A.M. – 10:15 A.M.

3E Time Recording

Presented by Cheng Kwee Chua and Jenny Lee

Join us for an in-depth look at the features and functionality of 3E's time recording features Time Entry and Time Capture. Discover key features and related setups that can help you tailor time recording at your firm.

 Suitable for all attendees

PINYON BALLROOM 1

3E Workflow in One Hour!

Presented by Terry Gibson and Elena Miro

Watch as our speaker creates a flawless 3E workflow in just under one hour. The remainder of this tutorial will be used to answer questions and discuss other possible workflow solutions.

 Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 2

Manage E-billing Rules and Compliance in 3E and eBillingHub

Presented by Laura Bengford and Kim Mann

Join us for a review of the e-billing functionality that will help your firm successfully manage e-billing rules in 3E from the time entry stage to generating the bill. In addition, we will preview several new e-billing features coming in 2.7.

 Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 3

Template Report Objects – Part 1

Presented by Val Brady and Justin Bortnicker

This tutorial will provide a review of standard report objects associated with Invoice Management templates in 3E. Gain a better understanding of the structure and data that is included in these objects.

 Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 6

3E and MatterSphere: Creating Lawyer Efficiency

Presented by Mark Craddock and Anthony Beasdale, Maurice Blackburn Pty Limited

Hear how Maurice Blackburn achieved exponential efficiencies in lawyer and front-office staff by combining 3E with MatterSphere.

 Suitable for all attendees

PINYON BALLROOM 7

3E Rates

Presented by Mary McCarthy and Betsy Esquivel

Discover how 3E Rates can help your firm implement rate schedules to maximize profitability and maintain competitiveness within the marketplace. We will discuss rate types, rate exceptions, multi-dimensional rates, rounding methods, and how to define rates by currency. Discover tips and tricks for reviewing rate structures, making global rate updates, and reviewing rate logic using the Get Rate logic calculator.

 Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 8

Industry Trends in Alternative Fee Arrangements

Presented by Dan O'Day

Alternative billing arrangements are here to stay. Gain a high-level overview of the considerations a law firm faces when selling, staffing, and billing for an alternative fee arrangement. Explore many examples of such fee arrangements, including collaboration between clients and law firms. Immediately following this presentation will be two additional tutorials: Alternative Fee Arrangements in 3E and Alternative Fee Arrangements in Enterprise which will explore the specifics of setting up and managing these arrangements in the Elite systems.

 Suitable for all attendees

BRISTLECONE 9

3E USERS – TUTORIALS

WEDNESDAY, JUNE 27, 2012

10:45 A.M. – 12:15 P.M.

3E Billing Transactions to Tables

Presented by Betsy Esquivel and Mary McCarthy

Explore the 3E Invoice Management Data Structures by tracking the life of a timecard as it flows through the 3E tables. Learn how various actions in the billing process impact data records, including when new records are written and how they link back to the original transaction.

i Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 2

Alternative Fee Arrangements in 3E

Presented by Clare Denby

Today's economy requires a firm to be more creative with their billing rates. Immediately following the Industry Trends in Alternative Fee Arrangements tutorial, which will discuss general trends in the legal industry regarding AFAs, this tutorial will provide an in-depth discussion on how to use flat fee billing in 3E and how to set up various flat fee rate structures to achieve these new creative billing rates.

i Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 3

Template Report Objects – Part 2

Presented by Val Brady and Justin Bortnicker

This tutorial will provide a review of standard report objects associated with checks, statements, and collections templates in 3E. Gain a better understanding of the structure and data that is included in these objects.

i Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 6

Nuances of Implementing Global Requirements in 3E

Presented by Mike Bailey, Pinnacle International Consulting

Are you curious about the best way to collect and implement the various global requirements in 3E for large International firms? Learn how to approach this critical requirement gathering process. Understand how the architecture of 3E supports features to provide an infrastructure that meets the local office statutory requirements while also meeting the firm requirements.

i Suitable for all attendees with basic knowledge of the subject matter

PINYON BALLROOM 7

3E USERS – SESSIONS

WEDNESDAY, JUNE 27, 2012

2:00 P.M. – 3:00 P.M.

3E Bank Reconciliation

Presented by Andrew Dutton

Come learn how the 3E Bank Reconciliation functionality can automate the balancing of your bank statements (office and client/trust accounts) to the General Ledger. This session will display how quickly and easily a statement can be reconciled using Quick Bank Reconciliation. We will also discuss the rich features of the Full Bank Reconciliation Module.

 Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 1

Find Out About Engage

Presented by Nathan Bowie

Join us for an exciting look at the features and functionality of Engage. Learn how Engage will help your firm increase profitability while becoming more transparent to your clients.

 Suitable for all attendees

PINYON BALLROOM 2

3E Volume Discounts

Presented by Betsy Esquivel and Mary McCarthy

In version 2.6 several new enhancements were added to provide firms much more flexibility in setting up volume discounts. Explore how these new enhancements can accommodate the changing world of client billing requirements.

 Suitable for attendees with basic knowledge of the concept

PINYON BALLROOM 3

Power of 3E GL Allocations

Presented by Rhonda Compher and Lisa Brown

Do you have amounts in your GL that should be allocated to other offices, departments, and practice groups? This session will review some common use cases for GL allocations and take you on a tour that covers the setup of allocation groups through generating the allocation general journal entry. A review of the underlying concepts of constants, looping, and summing will be discussed. Learn how GL allocation groups split or reclassify amounts to a group of pre-defined general ledger accounts instantaneously.

 Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 6

Design Gallery for 3E

Presented by Jason Taylor

Join us for an introduction to this next-generation document automation solution and what it offers to 3E users. This session will review the latest version and the soon-to-be-available integration with 3E 2.7.

 Suitable for all attendees

PINYON BALLROOM 7

A Look into eBillingHub's Data Warehouse – Present Practices and Future Trends

Presented by Carlos Seoane

Over the past eight years, eBillingHub has processed more electronic invoices than any other company in the industry. Our anonymized data provides a unique look into the practice of e-billing, including common issues, obstacles, and future trends.

 Suitable for all attendees

BRISTLECONE BALLROOM 10

Increase Revenue, Streamline Finance Processes, and Extend Elite 3E and Elite Enterprise with Automated Time Capture

Presented by Eldean Ward, IntApp

Manual time entry no longer meets the needs of lawyers and firms. Overlooked activity, inefficient tracking and billing processes, and poor user experience all call for a fresh approach. Today, firms are adopting time capture software that integrates directly with Elite 3E and Elite Enterprise. It automates activity tracking, classification, and grouping, so lawyers can easily review and submit billable activity. This delivers significant value across the firm. Attend this session to hear firsthand case studies of this new approach.

 Suitable for all attendees

BLUETHORN 11

3E USERS – SESSIONS

WEDNESDAY, JUNE 27, 2012

3:30 P.M. – 4:30 P.M.

The Exciting World of Elite Mobile

Presented by Justin Farmer and Mike Walker

The future is now! Find out about the latest trends in mobile and how Elite is implementing these trends across Elite's many product lines. Learn how mobile can transform your firm and improve productivity. This session will give you a glimpse of what is possible.

 Suitable for all attendees

PINYON BALLROOM 1

Our Favorite 3E Features

Moderated by Mike Rose

Join us as subject matter experts across Elite demonstrate and discuss their favorite features, why they are important, and how you can use these features in your firm.

 Suitable for all attendees

PINYON BALLROOM 2

Contact Management with Hubbard One

Presented by Rob Saccone

Looking for a better way to manage your firm's client relationships? Come and see how Contact Manager and ContactNet are paving the way for better client management and how these products can be integrated with Enterprise and 3E.

 Suitable for all attendees

PINYON BALLROOM 3

60 Minutes: Five Customizations

Presented by Elena Miro and Terry Gibson

Discover how easy it is to customize 3E in so many ways. Witness the development of five completely different customizations in one hour.

 Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 6

Getting Your 3E Payments Out the Door

Presented by Lindsey Nations and Andrew Dutton

This session will provide a review of the many different options for generating payments in 3E, including direct, prepaid, manual, standard payment runs, and electronic payments.

 Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 7

Elite Education Services: Software Education Services Overview

Presented by Daniel Martinez and Kerry Vandermolen

Please join us for an overview of our newest client global services department – Elite Education Services. This team is dedicated to providing high quality training to support your business processes and help maximize your investment in Elite software. Our qualified trainers have the expertise to meet individual learning needs and programs that focus on the function of Elite's products from both an application and technical end user perspective. Education Services provides an extensive curriculum of education courses, offered in a wide variety of training environments in support of your day-to-day operations and success with Elite software.

 Suitable for all attendees

PINYON BALLROOM 8

8 Essential Expense Controls Used by Top AmLaw Firms

Presented by Dave Terry and Anne Becknell, Chrome River Technologies

Attend this enlightening discussion with Elite customers on essential expense controls and best practices in invoice and expense reporting workflow used by half of the AmLaw 100. Hear how they tackled cost control issues through new services and best practices that saved time and money. Learn how they are improving AP business processes while improving employee satisfaction. Hear what they are using to create and enforce spend policies that provide more consistency for client billings and greater visibility into employee spend practices, ultimately reducing costs and improving their bottom line.

 Suitable for all attendees

BLUETHORN 11

3E USERS – SESSIONS

WEDNESDAY, JUNE 27, 2012

4:45 P.M. – 5:45 P.M.

3E Records Overview

Presented by Mark Leavitt and Jerid Dupier

This session will provide a fascinating exploration of 3E Records, including automated retention/disposition and electronic records management capabilities.

i Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 1

3E Troubleshooting Techniques

Presented by Tim Gerrity

Examine 3E's integrated troubleshooting tools. Learn how to initiate user logging and retrieve the logged results. Discover the benefits of the integrated log view and how it aids in the interpretation of logged results. Learn how to establish individual logs for complex system tasks utilizing tricks within Notification Task Manager. Explore 3E's integrated ability to view current form attributes and understand the benefits this provides in troubleshooting. This presentation will feature a product demo.

i Suitable for technical professionals or firm administrators with experience managing a 3E system.

PINYON BALLROOM 2

OneView, OneView Foundation, and Elite

Presented by Rob Saccone

Learn how OneView and OneView Foundation can present and transform Elite data and data from various firm sources in SharePoint.

i Suitable for all attendees

PINYON BALLROOM 3

Did You Know?

Presented by Jay Maclean

You've attended the Our Favorite 3E Features session and maybe some other sessions that discussed some of the more high profile features in 3E. Now join us as we review some of the great time-saving and shortcut features in 3E.

i Suitable for all attendees

PINYON BALLROOM 6

Understanding WIP Provisioning and Doubtful Invoices in 3E

Presented by Betsy Esquivel and Jenny Lee

In the upcoming 2.7 release, a new powerful feature is being added: Work-in-Progress Provisioning. Join us as we provide a demo of this new feature and also review doubtful invoices and how they can help you track your Accounts Receivable reserves.

i Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 8

Conflicts Reporting with Data Transformation Services

Presented by Mark Beaman

Learn how the Data Transformation team can design meaningful conflicts reports to meet the needs of your firm.

i Suitable for all attendees

BRISTLECONE BALLROOM 8

The Intersection of Finance and the Practice of Law

Presented by Nathan Bowie and Munger Tolles, Finnegan, Dorsey

Thomson Reuters Engage is the first comprehensive Engagement Planning & Management (EPM) software tool that enables law firms to create, monitor, and manage integrated budgets and work plans for matters and portfolios of matters. Find out how to win new business and ensure matter profitability through three different approaches to using Engage for precision matter budgeting and legal project management.

i Suitable for all attendees

BRISTLECONE BALLROOM 10

Extending Elite 3E and Elite Enterprise with Intelligent Integration and New Data Management Strategies

Presented by Norm Mullock, IntApp

Hear firsthand case studies of how firms are leveraging new integration approaches to address common process challenges, including pre-cost information management, timekeeper account creation, new business intake, and lawyer time entry validation, as well as common data import tasks, including importing budget loads, currency loads, and rate loads into the general ledger. Learn how connecting information from other business systems with Elite can deliver valuable management- and lawyer-facing alerts and event-driven reports.

i Suitable for all attendees

BLUETHORN 11

3E USERS – SESSIONS

THURSDAY JUNE 28, 2012

8:15 A.M. – 9:15 A.M.

Introduction to MatterSphere

Presented by Liam Wright and Peter Barnett

Learn how MatterSphere, Elite's exciting new matter management product with more than 200 clients in the UK and Australia, will make your lawyers more efficient, regardless of practice area or geography.

 Suitable for all attendees

PINYON BALLROOM 1

A Plethora of Reporting Solutions

Presented by Milan Bobde and Justin Farmer

Hands down, Elite has a lot of reporting solutions. Join us for this session as we provide an overview of each reporting solution, its targeted product/module/business drivers, and the benefits each provides. We will also provide guidelines to help you determine what is best for your firm.

 Suitable for all attendees

PINYON BALLROOM 2

3E Records 2.7 Highlights

Presented by Jerid Dupier

This session will provide highlights of the upcoming enhancements for Records in release 2.7.

 Suitable for all attendees

PINYON BALLROOM 3

3E Purchasing

Presented by Deb West

Learn how the 3E Purchasing module can help your firm track spending, group purchases for better pricing, and ultimately reduce firm costs. The advantage of this module is powerful integration with the 3E Accounts Payable system which reduces data input and overspending. A product demonstration will be provided. Also included will be a preview of the coming attractions in version 2.7.

 Suitable for all attendees

PINYON BALLROOM 6

3E Office and Outlook Integration

Presented by Alan Taylor

Discover new functionality to integrate your Microsoft® Office applications with 3E. Learn about the 3E Excel® add-in which provides helpful features across the Microsoft Office Suite. Then check out the new 3E Outlook® integration options for time entry, timers, 3E entity integration, 3E Calendar Management integration, and 3E Records integration.

 Suitable for all attendees

PINYON BALLROOM 7

Discover How eBillingHub Can Streamline the Billing Process

Presented by Ryan Ladisic

e-billing is here to stay and is becoming more and more popular with corporate clients, and for very good reason: it vastly improves productivity across companies. This session will explore the standard flow of the billing process and show you how eBillingHub, fully integrated with Elite Enterprise and 3E, addresses the areas where firms face the greatest challenges in executing their electronic bills.

 Suitable for all attendees

BRISTLECONE BALLROOM 10

Effective Project Management for Your Project Large and Small

Presented by Jane Threkheld and Dana Clifford, Source Consulting Group

Effective project management is critical to the success of any project large or small. This is even more important for your firm's financial system projects which have a major impact on your firm's operations. Learn key techniques and tools you can apply to your firm's projects to ensure success, including effective project resource management, project financial management, and project time line management.

 Suitable for all attendees

BLUETHORN 11

3E USERS – SESSIONS

THURSDAY JUNE 28, 2012

9:30 A.M. – 10:30 A.M.

Document Assembly with MatterSphere

Presented by Liam Wright and Nic Aiken

This session will provide an in-depth look at the many functions that support document assembly.

 Suitable for all attendees

PINYON BALLROOM 1

Owning Your 3E Implementation

Presented by Tracy Fraser

Your firm bought 3E. It's been installed. Now what? Whether it's everyday processing or preparing for and closing the month, this session will highlight the business functions in need of ownership. Topics will cover a multitude of items from monitoring user processes and transaction queues, to establishing meaningful and actionable alerts or distributing data with confidence. Learn how to establish guidelines that pave your way to successful system ownership.

 Suitable for technical professionals, project managers or firm administrators

PINYON BALLROOM 2

Conflicts 2.7 Highlights

Presented by Jerid Dupier

Join us for a preview of the exciting new features for Conflicts in release 2.7.

 Suitable for all attendees

PINYON BALLROOM 3

Staying Current – Banking Regulations and International Payment Processing for Professional Services Firms

Presented by Anthony F. Loiacono, Jr., Global Exchange Group

This session will focus on the ever-changing world of international payments for professional services firms, including foreign exchange and the economy; BSA and Patriot Act updated regulations; foreign invoices, data processing, imaging, storage, and image retrieval; foreign associate and vendor relations; and ONESStep Elite® integration. As a leading source in bank-operated international payment solutions, Global Exchange makes foreign payments and Elite integration easier, safer, and more efficient. Join us as we explore why over 40% of AmLaw 200 firms have selected Global Exchange as their international payments provider.

 Suitable for all attendees

BLUETHORN 11

3E Fixed Assets

Presented by Deb West

Manage your assets with the 3E Fixed Assets module. Learn how this powerful system is fully integrated with other 3E modules and how it can automatically track and depreciate the firm's assets. A product demonstration will be provided. Also included will be a preview of the coming attractions in version 2.7.

 Suitable for all attendees

PINYON BALLROOM 6

3E Advanced Reporting

Presented by Milan Bobde

Learn about the new reporting product with 3E. Discover how Advanced Reporting leverages Microsoft SQL Server Reporting Services as the platform to help you create, manage, and distribute your 3E reports. Further learn about the reports shipped with the product focusing on different KPIs (Key Performance Indicators).

 Suitable for all attendees

PINYON BALLROOM 7

3E Ethical Walls and Data Level Security

Presented by Jay Maclean and Avneet Sahni

What are ethical walls? How does data level security work? How are these features related? This session will provide an overview of the different types of security in 3E, why they are important, and the benefits and consequences of each. We will also discuss recommendations on how to implement each one.

 Suitable for attendees with a basic understanding of 3E security

PINYON BALLROOM 8

Elite's Knowledge Resources

Presented by Ken Boultinghouse and Dan Wesol

Learn how you can use the Elite Knowledge Base and documentation sets to more effectively find and use information at your firm. This session will review the available resources and discuss how to access and use them.

 Suitable for all attendees

BRISTLECONE BALLROOM 8

Learn About New Features Available within eBillingHub

Presented by Christopher Danaher and Jessica Kutrufis

Join us as we demonstrate recently added eBillingHub tools designed to further streamline the billing process. Explore improvements such as new editing options, cost backups, validating timekeepers prior to generating invoices, and more.

 Suitable for all attendees

BRISTLECONE BALLROOM 10

3E USERS – SESSIONS

THURSDAY JUNE 28, 2012

11:00 A.M. – 12:00 P.M.

3E Framework 2.7**Presented by Ruby Lee, Harun Diri, and Kim Tran**

Join us for a preview of coming attractions for the 3E Framework in release 2.7. Several new features are on tap to be added, and you won't want to miss this preview.

f Suitable for all attendees with a basic understanding of the 3E framework

PINYON BALLROOM 1

Analyze the Profitability of Fee Earners and Engagements with 3E**Presented by Janis Gaston**

Learn how to use 3E to calculate the profitability of various engagements and fee earners in your organization. Further discover the methodology behind the allocation of expenses.

f Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 2

3E Conflicts – 2.6/2.7 Upgrade Considerations**Presented by Mark Leavitt**

Learn about the changes and improvements being made to the 3E Conflicts application in v2.6. Discover steps and considerations that need to be taken prior to upgrading.

f Suitable for firm administrators

PINYON BALLROOM 3

The Best and Newest Features of 3E Trust**Presented by Melinda Ward**

Review the robust functionality of 3E's Trust module, including the various setup and comprehensive reporting options. Discover the latest features, including the new Office to Trust transfer.

f Suitable for all attendees

PINYON BALLROOM 6

3E Collections**Presented by Laura Bengford**

Manage your firm's credit and risk portfolio by automating collections activities, workflows, and alerts for aged work and bills in one place and in real time. Explore new features to automatically reset workflows when invoices are paid and explore coming features for KPIs, DSO, reporting, notifications, aged WIP, and Outlook integration.

f Suitable for all attendees

PINYON BALLROOM 8

THURSDAY, JUNE 28, 2012

1:00 P.M. – 2:00 P.M.

3E Roadmap**Presented by Justin Farmer**

Join us as the 3E Product Management team, led by Justin Farmer, discusses the future of 3E.

f Suitable for all attendees

PINYON BALLROOM 1

Introducing ClientPay® for Elite®**Presented by Jay Bruber, Vince Arnoldi, and Ryan Beck, BankCard Services Worldwide**

Learn how ClientPay for Elite turns credit and debit card payment acceptance from an error-prone and time-intensive task into an efficient, accurate, and cost-saving process. We'll demonstrate how this new, integrated payment solution for the Enterprise platform reduces the amount of time and effort required to accept and process payments, update accounts receivable and disperse funds to both operating and trust accounts. Presented by BankCard Services Worldwide, Elite's integration partner for payment processing solutions.

f Suitable for all attendees

PINYON BALLROOM 6

Best Practices for Implementing 3E**Presented by Rob Beisswenger and Barbara Shane Jackson, Sullivans**

This case study is geared towards clients who are preparing to implement or are considering implementing 3E. We will discuss how Sullivans was implemented under Elite's new PQM methodology which reduces the time between the start of the implementation and go live.

f Suitable for firm administrators, project managers or technical professionals

BRISTLECONE BALLROOM 7

Image Connect**Presented by Brad Kahnamoui, Janis Gaston, and Matt Jamma**

Image Connect, Elite's standalone imaging application, is a .NET Web-based product that enables automatic association of images with transactions. It features batch scanning and processing of hard copy documents into PDF and TIFF images. Image Connect integrates with Elite Enterprise, ELITE 3E, GEAC, and any other .NET Web-based application using its Web Services. See demonstrations of how Image Connect works with both Enterprise and 3E and learn how one client transformed their business using it.

f Suitable for all attendees

BRISTLECONE BALLROOM 8

3E USERS – SESSIONS

THURSDAY JUNE 28, 2012

2:45 P.M. – 3:45 P.M.

3E Elite Service Bus

Presented by Ruby Lee

Get on the 3E Elite Service Bus. This session will provide an overview of the Elite Service Bus, focusing on BizTalk integration, interfaces, and system configurations.

 Suitable for all attendees

PINYON BALLROOM 1

Insurance Billing

Presented by Tracy Fraser and Clare Denby

Take a tour of the new features in 3E 2.6 that enable complex billing requirements for your insurance clients, taking split-level and multi-payor billing to new heights.


 Suitable for all attendees

PINYON BALLROOM 2

3E Withholding Taxes

Presented by Nadia Strobbia and Andrew Dutton

Join us for an overview of withholding taxes in 3E as well as a demonstration on the new enhanced vendor withholding taxes and reporting.

 Suitable for all attendees with a basic understanding of the subject matter

PINYON BALLROOM 3

Virtualization with Elite

Presented by Maurice Meezs and Bimal Dave

Learn how to best configure a virtualized environment for optimum performance of either Enterprise or 3E. Find out Elite's policy and recommendations for implementation.

 Suitable for technical professionals

BRISTLECONE BALLROOM 10