RETURN ON INNOVATION

2010 USER CONFERENCE
JUNE 15-17 • MIAMI

At the legendary
Fontainebleau Miami Beach

ELITE ENTERPRISE SESSIONS

How Do You Know You Are Ready for 3E?

If you are an Enterprise client, join us as we discuss when it's right to migrate to 3E. This session provides a structured framework for evaluating the potential benefits of 3E against the needs of your firm. The session will also provide examples of benefits seen by other clients that have made the move and some of the ROI they have seen from that. You will leave this session with a method that can be used to help evaluate when your firm should consider a move to 3E. This session includes a demo.

Suitable for all attendees

Introduction to 3E for Enterprise Users

If you are wondering what 3E is all about, this session is for you. Join us as we explore the world of 3E. This session will introduce you to the new platform look and feel and will highlight 3E functionality. This session includes a demo.

Suitable for all attendees

Our Favorite Enterprise Features

Join us as we reveal some of Enterprise's most powerful and valuable features. We'll share with you some hidden tips and tricks that you can use to achieve competitive advantage. All users at various levels of experience are sure to benefit from this informative session. This session includes a demo.

Suitable for all attendees

Automating the Balancing Spreadsheet

Learn how to save time by automating the balancing spreadsheet. A new tool in the core Enterprise product makes it easy as it fills in the balancing spreadsheet for you. The new functionality can be used for firms with simple masking and is available for Enterprise versions 3.5 and higher. This session includes a demo.

Suitable for accountants, managers and financial analysts

Balancing Diagnostics

Join us as we showcase the capabilities of Enterprise Bank Reconciliation and Bank Statement Handler (BSH). Learn the differences between the two applications and when you should use each one. We will review the common procedures followed in both applications. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

See How eBillingHub Can Streamline the Billing Process

Learn how to improve billing accuracy and increase client satisfaction with eBillingHub—a fully integrated, Web-based electronic billing solution. Join us as we explore the standard flow of the billing process and how the eBillingHub solution addresses the areas where law firms face the greatest challenges in executing their electronic bills. Listen to billing managers' and billing specialists' perspectives as they discuss the eBillingHub process. Learn about reporting basics and the eBillingHub integration to Enterprise billing. This session includes a demo.

Suitable for all attendees

Discover the Advantage of Elite Global Release

Learn about Elite Global Release (EGR) and how it can help your firm manage global operations and standardize accounting procedures across multiple offices. This session will take a look at EGR's main advantages and advanced features that benefit global firms. We will also discuss the road of moving to EGR. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

Enterprise Product Roadmap

This session will cover the Enterprise product development roadmap for the 3.9 release and beyond. Enterprise continues to grow and broaden with each release. We will reveal the new enhancement voting methodology as well as the plans for the future. This session includes a demo.

Suitable for all attendees

THOMSON REUTERS™

ELITE®

ELITE ENTERPRISE SESSIONS

Financial Reporting with Clarity – a User's Perspective

This session will provide a firsthand account of what one law firm has done using reporting in Enterprise, and learn how they are leveraging Clarity reporting capabilities in conjunction with 3E. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

FRx to Financial Reporting

Explore the new financial reporting capabilities in the Enterprise world and get an introduction to Clarity Financial Reporting. This Microsoft Excel-based application allows you to leverage preexisting knowledge to create and maintain financial statements. This session includes a demonstration of how the industry uses the Financial Reporting product.

Suitable for accountants, managers and financial analysts

Implementing a New Business Intake Workflow

Hear from your fellow colleagues about their implementation of Elite Process Manager for the New Matter Intake process. A panel of Elite Process Manager users will share their experiences: their highs, lows and recommendations to others considering workflow implementations and projects.

Suitable for accountants, managers and financial analysts

Interim Bills / Alternate Billing Strategies

This session looks at the processing of Interim Bills (also known as Retainer Bills, On Account Bills or Fixed Fee Bills). We will discuss how Interim Bills can be utilized in Enterprise including setups, billing in proforma edit, billing via bill generation, applying credits, the impact on statistics and inquiry in Enterprise and WebView, application of time to interim bills and closing bills. This session includes a demo.

Suitable for accountants, managers and financial analysts

Proforma Edit Tips and Tricks

Explore some of Proforma Edit's key tips and tricks including the most commonly overlooked features to optimize the billing process and reduce billing inconsistencies. Application of unallocated payments and trust monies, global changes, interim and flat-fee transactions, anticipated entries and rate adjustments are some of the topics covered. This session includes a product demo.

Suitable for attendees with a basic understanding of the subject matter

Tips for Data Mining in Enterprise

Join us as we reveal important techniques for mining data in Enterprise Billing Inquiry. Learn how to identify standard reports based on topic or need. Discover tips and tricks to help you get the data you need more efficiently. This session includes a demo.

Suitable for all attendees

The Road to 3.9 Accounts Payable and General Ledger

Review the functionality in Accounts Payable and General Ledger that has been released in the past versions of Elite Enterprise leading to Enterprise 3.9. This session includes a demo.

Suitable for all attendees

The Road to 3.9 Billing Manager

Review Elite Billing Manager functionality that has been released in the past versions of Elite Enterprise leading to Enterprise 3.9. This session includes a demo.

Suitable for all attendees

The Road to 5.4 WebView

Review the functionality that has been released in the past versions of WebView leading to WebView 5.4, including time entry reports, customizing UDF viewing, billing capabilities via WebView, setting defaults and improved navigation features. This session includes a demo.

Suitable for all attendees

Voucher and Check Approvals

One of the most important aspects of a financial system is control. Accounts payable gives you the ability to control your payments by having standard approval processes. Learn how to set up the approvals, access the approvals (through Enterprise or WebView) and approve or deny the transaction. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

What's Coming in 3.9 – Enterprise Conflicts, Records and Case Manager

The robust Enterprise practice management system offers a multitude of features to streamline your firm's conflicts, case and records processes. Now, discover a host of new enhancements available in Enterprise v3.9 for Conflicts Manager, Records Manager and Case Manager. This session includes a demo.

Suitable for attendees with a basic understanding of subject matter

ELITE ENTERPRISE SESSIONS

Enterprise Reporting Analytics Foundation and Reporting Essentials Roadmap

The Business Intelligence product line has increased capabilities of creating and distributing reports and dashboards. Come learn about the current releases of the Business Intelligence product line and the future of these products. This session includes a demonstration of best practice uses of the products.

Suitable for all attendees

Moving Your Data from Enterprise to 3E

Is your firm contemplating a move to 3E? What is involved in moving your firm's data from Enterprise to 3E? In this session, you will learn the strategies in moving Enterprise data to the 3E database, with direct experience from the field discussed. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

SharePoint Integration Strategies

Elite and the Thomson Reuters family company Hubbard One/XMLAW are now partnering to provide their clients with state of the art SharePoint functionality. Elite and Hubbard One SharePoint experts will discuss SharePoint strategies and integrations for the Enterprise and 3E platforms. This session includes a demo.

Suitable for accountants, managers and financial analysts

Business Continuity Roundtable

Join us for a roundtable discussion on Business Continuity. We'll focus on topics that are prime subjects of interest, based on survey results, such as virtualization, client case studies and the pros and cons of continuity.

Suitable for technical professionals with several years of experience

A Gallery of Elite Global Release Features

The Elite Global Release settings support a wealth of functionality designed specifically for firms operating in a global environment. Learn how to take advantage of EGR features by gaining insight of specific EGR functionality like currency and exchange rate options, trust withholding taxes, date validations and parallel posting.

Suitable for attendees with familiarity with Elite Global Release settings

Personalizing WebView

Join us for a demonstration of how to personalize WebView for your firm. You will learn how to utilize page design functionality to customize various elements of the WebView interface. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

WebView Inquiry vs. WebView Enterprise Inquiry

Why are there two Inquiry modules in WebView? Learn the differences and similarities between the two WebView Inquiry modules as they are shown side by side. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

Budgeting and Forecasting with Clarity

Elite, in partnership with Clarity Systems, offers Elite Budgeting and Forecasting, a powerful budgeting and forecasting solution to meet your Business Intelligence needs that enables you to create financial budgets quickly and easily. In this session, you will explore the process and technology of obtaining and reporting on budgeted information. This session includes a demo.

Suitable for accountants, managers and financial analysts

Workflow Beyond New Business Intake: Discover Other Ways Metastorm Can Automate Core Business Processes

Learn about the myriad of other options for using Metastorm to automate various firm processes. Discover the library of out-of-the-box templates and process pods that can be used to rapidly implement new processes like new employee onboarding, travel requests and expense reimbursement, performance reviews, conference room scheduling and project management. This session includes a demo.

Suitable for all attendees

Alternative Billing Trends and Practices

Clients are demanding new ways of controlling spend and setting limits by using alternatives to the billable dollar. Learn from industry analysts the latest trends and practices affecting firm's billing arrangements. This session includes a demo.

Suitable for all attendees

ELITE ENTERPRISE SESSIONS

Arrivals & Departures – Best Practices for Handling Lateral Hires and Departing Lawyers

Join industry expert Hinshaw & Culbertson as they present best practices for managing the risks associated with handling lateral attorney and staff hires and attorney and staff departures. This session includes a demo.

Suitable for all attendees

Best Practices for Delivering New Solutions to Attorneys

Reduce attorney resistance and gain faster adoption of new applications in your firm. Learn best practices and discover tools for breaking down barriers based on research conducted by Elite and information gathered in the field. We'll share with you simple tips and tricks, as well as complex processes and procedures for making deployment a success at your firm. This session includes a demo.

Suitable for all attendees

Litigation Holds and the Obligations of Lawyers to Mind Their Clients' (Electronic Discovery) Business

Join us as we dig deep into several aspects of litigation holds and obligations. Examine the risk management implications of the case law and revised Federal Rules of Civil Procedure for the relationship between outside counsel and their corporate clients. Discuss the duties of corporate IT departments in connection with litigation to determine who is in charge. Also learn who is responsible for storing data held pursuant to litigation holds and the consequences of "failure." This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

Elite Process Review – Jumpstart Your Firm into the Next Level

Learn how Elite Process Review offers actionable, cost effective recommendations for leveraging the power of your Elite system. Now more than ever, firms must constantly fine-tune and improve their business processes in order to better serve clients' needs. This session discusses 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. This session includes a demo.

Suitable for all attendees

Image Connect Overview

Learn how Image Connect, Elite's standalone imaging application, can help your firm save money and increase productivity by streamlining application and network image storage. Come see how easily and cost effectively you can install Image Connect to integrate with your existing Enterprise or 3E system, as well as Web services and much more. Learn about batch processing of hard copy documents, PDF and TIFF images. Reduce paper documentation and easily retrieve and print electronic images. This session includes a demo.

Suitable for all attendees

ELITE ENTERPRISE TUTORIALS

Alternative Billing Practices

Many of today's clients are demanding alternative billing arrangements. We will discuss many examples of such fee arrangements, including collaboration between clients and law firms. Learn how to handle these arrangements as we explore the considerations a law firm faces in regards to selling, staffing and billing. We will examine fee earner considerations when selling and obtaining alternative fee work and will evaluate the billing logistics involved with various arrangements within the context of Elite. This session includes a demo.

Suitable for all attendees

Bank Reconciliation and Statement Handler

Join us for an overview of the Enterprise Bank Reconciliation and Bank Statement Handler. Learn about recent functionality changes, including joint bills and multi-currency for Bank Statement Handler. This tutorial includes a demo.

Suitable for attendees with a basic understanding of the subject matter

Explore Ways to Improve Billing Operations

Learn how to meet your clients' billing requirements without compromising reporting. Explore the many billing rate options in Enterprise; how different rates, hours and adjustment methods affect your productivity and profitability reporting; the differences between firm-wide standard, regional standard and client exception rates; how rate presentation on timecards and proformas can aid or mislead Billing Timekeepers; and how bill presentation requirements can result in chronically overstated WIP and inaccurate revenue projections. This tutorial includes a demo.

Suitable for attendees with a basic understanding of the subject matter

An In-depth Look at ECCI

Take an in-depth look at Enhanced Client Cost Interface functionality (ECCI). Explore the power of pure or hybrid ECCI implementation. Discover approaches to implementing ECCI, ECCI setups and gain a transactional overview of posting results. Learn about data flow with associated elements and conversion considerations.

Suitable for attendees with a basic understanding of the subject matter

Enterprise Upgrades Explained

This tutorial will provide an explanation of the Enterprise upgrade process. Join us as Elite Services team personnel outline the services Elite provides, the overall process, necessary client steps and more. This tutorial includes a demo and will conclude with a 30-minute Q&A period.

Suitable for attendees with a basic understanding of the subject matter

Enterprise Security

Learn how to ensure safe and secure access to Enterprise. This tutorial will review security features of both Enterprise and WebView. Explore 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. This tutorial includes a demo.

Suitable for all attendees

Extend for Beginners

Whether you're new to Elite Extend or simply need a refresher course, this tutorial is for you. Explore the capabilities and power of Extend. During this presentation we will review the 29 preloaded standard Extend events. We will demonstrate the ease in how you customize the output and the capabilities to deliver these emails across the firm. We will also discuss the implementation process and timescales. This tutorial includes a demo.

Suitable for all attendees

FX Revaluation in Enterprise

This tutorial shows firms a practical view of how they can maximize the use of FX Revaluation Manager. Explore the treatment and posting of realized and unrealized foreign currency gain/loss. Enjoy a detailed review of realized gains/losses and their impact on financial reporting. This tutorial includes a demo.

Suitable for attendees with a basic understanding of the subject matter

Getting the Most Out of Enterprise Reports and Queues

Learn about Elite report queues and which reports work best in certain scenarios. Gain an understanding of missing time reports, best AR reports (with and without multi-payor), best WIP reports, timekeeper reports, profitability reports, audit reports and more. Discover how to use standard Enterprise reports and queues and listings (matter, clients, vendor, etc.) This tutorial includes a demo.

Suitable for all attendees

A Detailed View of Multi-unit and Multi-currency

If you are part of a global firm, you'll want to be sure to attend this in-depth look at multi-unit and multi-currency. We will explore the transactional flow of our complex configurations for both standard and Elite Global Release. This tutorial includes a demo.

Suitable for accountants, managers and financial analysts

ELITE ENTERPRISE TUTORIALS

Innovative Solutions – Billing Manager

Have you ever wondered "what is the best way to…?" and "what does everyone else do?" in regards to Billing Manager? Come and join us to find the answers to your questions. We will show you, among other things, options for discounting WIP, how to reassign fee credits and how to handle volume discounts. This tutorial includes a demo.

Suitable for accountants, managers and financial analysts

The Many Choices of VB Options

This tutorial will provide an overview of key VB options that control billing behavior. Gain an understanding of how settings such as bill finalize, bill reversal, matter, payment and proforma edit can influence billing behavior while providing additional control and flexibility. This tutorial includes a demo.

Suitable for attendees with a basic understanding of the subject matter

Focus on Key Performance Indicators with Reporting Analytics Foundation 2.4

Learn the process of creating a live dashboard using Reporting Analytics Foundation 2.4. Further explore the standard dashboards delivered with the product. This tutorial includes a demo.

Suitable for attendees with a basic understanding of the subject matter

Reporting and Distribution Using Reporting Essentials 2.4

Come see a demonstration of this end-to-end reporting application. Learn how to create reports on Enterprise data and distribute them to the organization. This tutorial includes a demo.

Suitable for accountants, managers and financial analysts

Customizing Elite Enterprise with VBA Scripting

Through a panel discussion, this tutorial explores 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 technical professionals with several years of experience

Understanding the Database Structure and Basic Table Relationships

This tutorial will provide you with a basic understanding of the Elite database structure. We will explore how basic Enterprise Billing Manager transactions move through the transaction tables and how they flow through to the summary tables and inqsnap views. Discover what tables hold this basic information and how these basic tables are linked together in Elite's Enterprise relational database. This tutorial includes a demo.

Suitable for technical professionals with several years of experience

Extend for Advanced Users

Learn to tailor Extend events to your firm's particular needs with Extend's extensive customization capabilities. Discover how to customize standard events with predefined settings, create custom events by modifying standard fields, add tables and fields and make format and layout changes. This tutorial includes a demo.

Suitable for technical professionals with several years of experience

Enterprise Taxes

Explore the many tax features of Enterprise and how they accommodate a host of taxation jurisdiction requirements across the globe. This tutorial will cover such topics as updated tax reports, withholding tax on interest and how to set up and work with accounts payable withholding taxes.

Suitable for attendees with a basic understanding of the subject matter

The Ins and Outs of WebView Expense Entry

Join us for a journey through WebView Expense Entry and how it flows through to the Enterprise PreCost subsystem. This tutorial includes a demo as well as setup and operational examples from a client perspective.

Suitable for attendees with a basic understanding of the subject matter

Using WebView Proforma Generation and Edit

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 includes a demo as well as discussion on setup and rollout from a client perspective.

Suitable for attendees with a basic understanding of the subject matter

ELITE 3E SESSIONS

Beyond 3E Templates

Why stop at bills, checks, statements and receipts? Learn how to unlock 3E data to create new categories of templates to suit your business needs. This session will include a demo on where to find the template schema, how to generate a source file, how to use the schema and source file in your template, and how to add a print button to Object or Print step to process.

Suitable for attendees with a basic understanding of the subject matter

Role Based Dashboards

See examples of custom 3E dashboards for matter and fee earner Key Performance Indicators (KPI) that were created by our Asia Pacific Team for firms in their region. Dashboards include various search options, timekeeper budget vs. actual figures, various key performance measures and drill-downs to more detailed information.

Suitable for all attendees

3E – Why Should You Upgrade?

Explore the reasons for upgrading 3E to the latest version. Topics include taking advantage of the new powerful features, increasing supportability and refreshing framework and technology capabilities. Learn about the process and how you can plan an upgrade to fully leverage all that 3E offers and make the most out of your investment. This session includes a demo.

Suitable for all attendees

3E Billing – Work-to-Cash Cycle

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 on how 3E can help you streamline the process to get bills out faster to increase cash-in. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

Maximizing Firm Efficiency – A 3E CFO Roundtable

Hear firsthand accounts from firm management of how 3E has increased the overall efficiency of their firm. Learn how these firms have streamlined their accounting and financial reporting activities using 3E's integrated Invoice Management module and other financial management software. Discover how 3E's powerful metrics and built-in process management capabilities can help you maximize your efficiency.

Suitable for accountants, managers and financial analysts

3E Collections

Maximize your collections efforts by using standard collections workflows with automated processes including events and notifications, managing tasks from a calendar, and defining rules and exceptions to the collection process. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

3E Financial Reporting

Review the latest functionality in financial reporting for 3E. From financial statements to general ledger transactions, these features help deliver the information you want, when you want it. This session includes a demo.

Suitable for accountants, managers and financial analysts

3E GL Budgeting

Discover how to take full advantage of 3E's General Ledger using its sophisticated features and powerful objective-setting capabilities. You'll learn best practices in managing general ledger budgets, how to get the most out of objectives, and how to improve your firm's financial management utilizing the most up-to-date tools. This session will examine timekeeper objectives, GL budget setup, billing timekeeper objective setup, and loading budgets and objectives. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

3E History of the Revolution

Elite 3E offers powerful core financial and practice management features and built-in application development capabilities—all seamlessly integrated into one high-performance system. 3E revolutionizes our business by becoming the next generation driving force in the legal financial management market. This session includes a demo.

Suitable for all attendees

3E Office & Outlook Integration

Discover existing and upcoming functionality to integrate your Microsoft Office applications with 3E. Learn about the existing 3E Excel add-in and the upcoming 3E Outlook Integration with options for time entry, timers, 3E entity integration, 3E Calendar Management integration and 3E Records integration. This session includes a demo.

Suitable for all attendees

ELITE 3E SESSIONS

3E Premium Intelligence Reporting and Analytics Overview

Learn about the current releases of the Business Intelligence product line on 3E and how it can help you further enhance the 3E experience. By utilizing the Crystal Reports and 3E integration, users will learn how to create reports using the Premium Reporting tool. Gain further insight into the standard 3E data in Premium Analytics which allows a user to drill into the details and slice and dice the information.

Suitable for all attendees

3E Product Roadmap

The 3E Business Optimization Suite allows firms to transform business capabilities to improve operations and achieve strategic advantage. Review the 3E product development roadmap and learn about new enhancements, features and modules coming in 2010. This session includes a demo.

Suitable for all attendees

3E Trust

Explore the robust functionality of 3E's Trust solutions. Learn about the various setup options that support this functionality, walk through sample transactions, and view the outcome of these transactions through the comprehensive reporting options. Discussions will include the certification process of 3E Trust with various jurisdictions.

Suitable for all attendees

Analyze the Profitability of Fee Earners and Engagements with 3E

Learn how to use 3E to calculate the profitability of various engagements and fee earners in the organization. Discover the methodology behind the allocation of expenses, how those allocations are defined in 3E and how the profitability results are presented. This session will dive into the multiple options for reporting profitability as well. This session includes a demo.

Suitable for accountants, managers and financial analysts

Defining Your Firm's Processes

The 3E Process Models are now available. These Visio-based flowcharts illustrate the day-to-day flow of several law firm operations in conjunction with 3E. There are over 100 models available which seamlessly integrate with the Elite 3E documentation suite. Attend this session to learn how to effectively use the process models to help redefine your business processes for greater efficiency. This session includes a demo.

Suitable for accountants, managers and financial analysts

Deliver Firm Performance Metrics Visually with Premium Dashboards

Learn more about 3E's highly interactive dashboarding solution. Explore how you can analyze your firm's performance quickly by visualizing Key Performance Indicators that provide summary-level metrics about key areas of the business. This session includes a demo.

Suitable for accountants, managers and financial analysts

Our Favorite 3E Features

Explore some of 3E's most powerful, valuable and flexible features. Discover how firms are using 3E to achieve competitive advantage. All users at various levels of experience are sure to benefit from this informative session. This session includes a demo.

Suitable for all attendees

3E AP & GL Inquiry and Reporting Basics

Learn how to get more from your General Ledger and Accounts Payable modules using inquiry reporting tools. Discover the best practices for using these tools in order to optimize the extraction and summarization of general ledger and account payable information.

Suitable for accountants, managers and financial analysts

3E Invoice Management Reporting Basics

Explore 3E's standard billing reports, inquiries and metrics to obtain the critical information your firm needs. Participants will be guided on running Aged WIP and Accounts Receivables, Timekeeper Statistics, Fee Realization, Rate Listings, Doubtful Invoices, Client Management and other management reports. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

Power of 3E GL Allocations

GL Allocations allow a user to set up an allocation group, collecting a cost or group of costs, from one part of the organization and allocating those costs to a different part of the organization. Dive deeper into GL Allocations and learn how to set up allocation groups and generate allocation general journal entries. Explore the concepts of constants, looping and summing, as well as how GL allocation groups allow amounts to be split or reclassified. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

ELITE 3E SESSIONS

Practical IDE Customizations

Examine some examples of how to selectively use the IDE to customize 3E to fit your business needs. Elite Technical Services works collaboratively with you to facilitate planning, implementation and management of solutions. See examples of process workflow, dashboards, and report design that the team has successfully implemented on past projects.

Suitable for technical professionals with several years of experience

Optimize Your 3E Deployment with Elite's Project Methodology

Quite often, 3E deployments represent a large capital expenditure investment on the part of our clients. Deployments require careful management and planning in order to protect this investment. At the heart of this process is Elite's PQM Project Methodology and most importantly, its cutting edge Vision & Strategic Planning phases. Gain a better understanding of what it involves and how you can best position your firm to undertake 3E deployment. This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

3E Troubleshooting Techniques

Examine 3E's integrated troubleshooting tools. Discover the benefits of the integrated log view and how it aids in troubleshooting. 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 session includes a demo.

Suitable for attendees with a basic understanding of subject matter

3E Conflicts – 2.6 Upgrade Considerations

Learn about the changes and improvements being made to the 3E Conflicts application in v2.6. Discuss the steps and considerations that need to be taken prior to upgrading. This session includes a demo.

Suitable for users with at least one year of experience

SharePoint Integration Strategies

Elite and the Thomson Reuters family company Hubbard One/XMLAW are now partnering to provide their clients with state of the art SharePoint functionality. Elite and Hubbard One SharePoint experts will discuss SharePoint strategies and integrations for the Enterprise and 3E platforms. This session includes a demo.

Suitable for accountants, managers and financial analysts

Business Continuity Roundtable

Join us for a roundtable discussion on Business Continuity. We'll focus on topics that are prime subjects of interest, based on survey results, such as virtualization, client case studies and the pros and cons of continuity.

Suitable for technical professionals with several years of experience

Budgeting and Forecasting with Clarity

Elite, in partnership with Clarity Systems, offers Elite Budgeting and Forecasting, a powerful budgeting and forecasting solution to meet your Business Intelligence needs that enables you to create financial budgets quickly and easily. In this session, you will explore the process and technology of obtaining and reporting on budgeted information. This session includes a demo.

Suitable for accountants, managers and financial analysts

Workflow Beyond New Business Intake: Discover Other Ways Metastorm Can Automate Core Business Processes

Learn about the myriad of other options for using Metastorm to automate various firm processes. Discover the library of out-of-the-box templates and process pods that can be used to rapidly implement new processes like new employee onboarding, travel requests and expense reimbursement, performance reviews, conference room scheduling and project management. This session includes a demo.

Suitable for all attendees

Alternative Billing Trends and Practices

Clients are demanding new ways of controlling spend and setting limits by using alternatives to the billable dollar. Learn from industry analysts the latest trends and practices affecting firm's billing arrangements. This session includes a demo.

Suitable for all attendees

Arrivals and Departures – Best Practices for Handling Lateral Hires and Departing Lawyers

Join industry expert Hinshaw & Culbertson as they present best practices for managing the risks associated with handling lateral attorney and staff hires and attorney and staff departures. This session includes a demo.

Suitable for all attendees

ELITE 3E SESSIONS

Best Practices for Delivering New Solutions to Attorneys

Reduce attorney resistance and gain faster adoption of new applications in your firm. Learn best practices and discover tools for breaking down barriers based on research conducted by Elite and information gathered in the field. We'll share with you simple tips and tricks, as well as complex processes and procedures for making deployment a success at your firm. This session includes a demo.

Suitable for all attendees

Litigation Holds and the Obligations of Lawyers to Mind Their Clients' (Electronic Discovery) Business

Join us as we dig deep into several aspects of litigation holds and obligations. Examine the risk management implications of the case law and revised Federal Rules of Civil Procedure for the relationship between outside counsel and their corporate clients. Discuss the duties of corporate IT departments in connection with litigation to determine who is in charge. Also learn who is responsible for storing data held pursuant to litigation holds and the consequences of "failure." This session includes a demo.

Suitable for attendees with a basic understanding of the subject matter

Elite Process Review – Jumpstart Your Firm into the Next Level

Learn how Elite Process Review offers actionable, cost effective recommendations for leveraging the power of your Elite system. Now more than ever, firms must constantly fine-tune and improve their business processes in order to better serve clients' needs. This session discusses 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. This session includes a demo.

Suitable for all attendees

Image Connect Overview

Learn how Image Connect, Elite's standalone imaging application, can help your firm save money and increase productivity by streamlining application and network image storage. Come see how easily and cost effectively you can install Image Connect to integrate with your existing Enterprise or 3E system, as well as Web services and much more. Learn about batch processing of hard copy documents, PDF and TIFF images. Reduce paper documentation and easily retrieve and print electronic images. This session includes a demo.

Suitable for all attendees

ELITE 3E TUTORIALS

Creating a Simple Check Approval Process in 3E

Join us in this tutorial for a step-by-step demonstration on how to create a simple workflow process in 3E to route an AP check request (based short voucher) for approval. Discuss the different routing methods in 3E and the benefits of each.

Suitable for attendees with a basic understanding of the subject matter

3E Balancing Basics

Explore 3E's month-end closing process and learn how to conduct a successful closing. Discover vital components needed to close, review the month-end checklist, and examine the month-end dashboard. This tutorial features a demo.

Suitable for accountants, managers and financial analysts

3E AP Overview – Purchase-to-Pay Cycle

Learn how your firm can gain better visibility into and control over the entire purchase-to-pay life cycle. Join us for an in-depth journey that covers vouchers, payments, inquiry and reporting. See how they work together to help you handle all of your firm's liabilities and costs in a powerful, single cash management system. This tutorial includes a demo.

Suitable for attendees with a basic understanding of the subject matter

3E Billing – Advanced Topics

Learn how to fully leverage 3E's advanced Billing features for your firm. Explore the different features like billed on account, volume discounts, credit notes, reversals, timekeeper allocations and doubtful amounts.

Suitable for attendees with a basic understanding of the subject matter

3E Billing Alternatives

Discover how easy alternative billing is in 3E using variations to the standard billable hour, flat fees, rate by time type and contingency.

Suitable for attendees with a basic understanding of the subject matter

3E Dashboards and Reporting Fundamentals

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.

Suitable for attendees with a basic understanding of the subject matter

3E GL Overview

3E General Ledger enables firms to quickly access critical transaction and reporting information needed to make timely and informed business decisions. This tutorial will examine key features, related setups and reports within GL. You will learn how customizing setup options can make GL features and reports work for your size firm. This tutorial includes a product demo.

Suitable for attendees with a basic understanding of the subject matter

The Ins and Outs of 3E Multi-currency

If your firm manages multiple locations, you'll want to be sure to join us as we discuss 3E's multi-currency capabilities and how they support multiple currency rates and associated transactions. We will discuss the inter-currency throughout the system, as well as the foreign exchange capabilities. Learn about the flexible currency reporting options that utilize transaction, unit, firm and three additional GL reporting currencies, along with tax reporting currency.

Suitable for attendees with a basic understanding of the subject matter

3E Rates

Discover how 3E rates capabilities can help your firm implement rate schedules to maximize profitability and maintain competitiveness within the marketplace. 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 attendees with a basic understanding of the subject matter

3E Time Recording

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 help you tailor time recording at your firm.

Suitable for attendees with a basic understanding of the subject matter

3E: Taxes and Tax Reporting

Explore 3E flexible tax setups that support indirect taxes (VAT, GST, etc.) and withholding tax. Look at different 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 with powerful GL reconciliation. This tutorial includes a product demo focusing on indirect taxes.

Suitable for accountants, managers and financial analysts

ELITE 3E TUTORIALS

3E Elite Service Bus

Learn how to automate and maintain your business processes in a dynamic and cost-effective manner. Elite Service Bus integrates disparate applications and enables third party applications to collaborate with the 3E platform. This tutorial will provide an overview that focuses on BizTalk integration, interfaces and system configurations.

Suitable for technical professionals with several years of experience

The 3E Invoice Management Life Cycle

3E Invoice Management lets you manage the entire customer invoicing life cycle from time and expense entry through draft bill editing, to the creation of final printed or electronic invoices. This tutorial will dive into the Invoice Management data structures. Join us as we track 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.

Suitable for attendees with a basic understanding of the subject matter

Advanced 3E Workflow Including New Business Intake

Learn how to leverage the 3E process designer to create workflow applications. We will review a best practice new business intake solution, in addition to a real-life customer implementation. This tutorial will cover the 3E IDE and design of workflow rules, routing and steps of a complete workflow solution.

Suitable for technical professionals with several years of experience

Prerequisite: Basic knowledge of the 3E IDE

Advanced OQL

Join us for a detailed examination of the 3E's powerful Object Query Language. Learn how to best leverage its capabilities to quickly and efficiently retrieve and manipulate your data.

Suitable for technical professionals with several years of experience and who plan to customize their system

HeatMap Profiling

Explore how 3E's "HeatMap" profiling tool can help identify and prevent possible system data processing inefficiencies by evaluating your custom logic prior to publishing it into your production software.

Suitable for technical professionals with several years of experience and who plan to customize 3E