1. **What is the Thomson Reuters Elite Workspace?**

Workspace is a new software experience created by Thomson Reuters Elite that focuses on the personalized needs of the individual user. It unifies process access, tasks, actions, and information from multiple source products and displays them on one screen so end-users can function more efficiently and our customers can stay competitive. From access, to information, to making informed business decisions, to taking an action on an automated business process, Workspace provides the user with all that is needed to complete their business and professional tasks in one central location.

2. **What is the purpose of the creating this solution?**

Elite offers an end-to-end enterprise business management solution with products for business development, risk management, client and matter management, and financial management. With these solutions we faced similar scenarios to those faced by our customers: the need to integrate multiple products and offer a common user experience. Workspace, powered by the Elite Integration Framework (EIF), directly addresses such scenarios by proliferating a common user experience across products and functions and by providing an integration and services framework to standardize and enable superior product integrations across the Elite product portfolio.

3. **Who are the users of Workspace?**

Workspace is designed for the users of Elite software. From lawyers to business operations professionals, Workspace delivers features that allow individuals to efficiently perform their tasks based on their role. The first release of Workspace and EIF (R1) focuses on the lawyer and offers configuration variations for four different lawyer personas: working lawyer, practice group lead, office managing partner, and firm managing partner. Additional personas can be added.

4. **What is the value of Workspace?**

Workspace provides the user a launch point for all tasks and actions the user needs to perform with 3E and MatterSphere and, in future versions, additional products. Individuals are presented with many tasks to perform in their roles, but must typically go to multiple products to complete various required tasks and actions. Workspace provides a true one-stop shop. Product data integrations available in future versions will also make users and products more efficient by allowing users to make an update in one system, and EIF will facilitate the automatic update of other connected systems.

5. **What software components are included with Workspace?**

Workspace includes the following components:

- **Workspace Web** – a browser-based application accessed from a user’s desktop.
- **Workspace experience within Elite Mobile** – a Workspace mobile experience accessed via the Elite Mobile application.
- **Elite Integration Framework** – an integration and services layer framework.
- **Designer utility** – a program used to make user interface and configuration changes for Workspace and Elite Mobile.

6. **What is the Elite Integration Framework (EIF)?**

EIF is the power behind Workspace and Elite Mobile. It is a framework and services layer in which adapters are plugged in for each source product in order to control how data is retrieved from those products and presented within Workspace. It provides a number of features, including:

- The ability to transform source product data into EIF’s required formatting.
- Maps like-entities from different source products (e.g., mapping a client in 3E to the same client in MatterSphere), and effectively merges them into a single item.
- Presents entities (clients, matters, document, etc.), screens, tasks, notifications, and similar data within the Workspace user interface.
- Provides built-in caching to make Workspace more responsive and in turn also reduces the load on the source systems.
- Provides built-in monitoring and testing services with logging, recording, and playback to provide enhanced support capabilities for customers and internal Technology and Support resources.
- Enables configuration customizations so the Workspace user experience can be created for a specific device on which the application will be used (e.g., PC desktop, tablet, phone).

7. **Is Workspace a part of 3E or MatterSphere?**

Workspace is a separate application that combines multiple products’ features through one user experience. These features still exist within each software package and will be delivered to our customers based on their needs. Workspace is packaged as an extension to our existing products. Workspace Web is accessed via an internet browser from the user desktop. The Workspace mobile experience is accessed via a mobile device through the Elite Mobile application. There is no specific “Workspace Mobile” application; rather, there is the Workspace experience within Elite Mobile.

8. **Which Elite products will Workspace utilize?**

Workspace integrates the solutions of 3E and MatterSphere initially.

9. **What product and system requirements will be required to use Workspace?**

The initial release of Workspace focuses on the 3E and MatterSphere product lines. We always encourage customers to be on the latest versions of our software so they can take advantage of the latest features and functionality.

<table>
<thead>
<tr>
<th>Source Product</th>
<th>Version Requirement</th>
<th>Customer Implementation Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>3E</td>
<td>2.71.0 (acceptable), 2.71.2 (preferred)</td>
<td>Live – in Production</td>
</tr>
<tr>
<td>MatterSphere</td>
<td>V6.0</td>
<td>Live – in Production</td>
</tr>
<tr>
<td>Elite Mobile</td>
<td>V2</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Workspace (Web and Elite Mobile) requires the Elite Integration Framework (EIF).

A separate product systems requirement (PSR) document will be available for Workspace, EIF, and Elite Mobile and will be published upon completion.
10. What is offered and supported in the initial release?
Workspace is available with three separate configurations across the Web and Elite Mobile: 3E and MatterSphere, 3E-Only and MatterSphere-Only. The 3E and MatterSphere configuration is considered the master, and the other two configurations are subsets of it. Firms will be installed with the configuration that matches their licensed products.

At the EiF level, stock adapters are provided for 3E, MatterSphere, Autonomy iManage (for document lists and presentation) and Microsoft Exchange (for tasks and appointments presentation). Customers using the MatterSphere DMS will be able to list and view those documents, and customers utilizing the iManage DMS will be able to do the same.

The Workspace user interface presentations will be user-focused and present the user with his/her (“My”) information in the form of financial statistics, key performance indicators and charts, tasks, appointments, (calendar view), client and matter views, native time entry, persona-based financial stats (firm, office, department, section), invoice views and the ability to launch 3E, MatterSphere, Engage, and Westlaw processes.

11. Will there be any restrictions in the initial release?
While tasks will be included in Workspace Web, they will not be included in the Workspace experience within Elite Mobile experience for R1, and will not be actionable until a subsequent release of Elite Mobile.

Customers will be limited to the stock configurations and adapters that we will provide. We will support customers in making basic changes to those configurations as they impact the user interface. Such changes will be primarily cosmetic in nature and will entail changing labels and captions, changing stock logos and color schemes, adding and removing columns, removing or changing the order and appearance of widgets, adding and removing fields from screens, adding a Web/URL link, and modifying persona configurations.

Customers and Elite partners will not be trained or supported on capabilities outside of these restrictions and will not be supported in creating separate product adapters to facilitate additional integrations.

12. Will the initial release restrictions be lifted in the future?
Beginning with the next version, we will allow customers and partners to begin to fully leverage the power and capabilities of EiF and Workspace. We will publish the API and provide a fully documented SDK including Visual Studio templates with a suite of unit tests. These features and capabilities were developed internally to increase the velocity of future development and will similarly benefit our customers and partners in the creation of additional product adapters. Licensing costs will be applied for third party product adapter enablement for those adapters developed by Elite, our partners, and/or customers.

13. How will additional product integrations be offered in the future?
We will write adapters for our products and selected partner and/or third party products. Partners will be able to create adapters for their products as will customers. These will be subject to the restrictions on competing products and licensing costs for adapter enablement.

14. What are the availability dates for Workspace?
Workspace is scheduled for controlled General availability (GA) in late May/early June 2014. Rather than a wide release, we will limit release on a customer-by-customer basis in order to minimize the impact on technology resources and overall 3E and/or MatterSphere implementation timeframes.

15. What are the costs to implement Workspace?
Workspace is a valuable tool that combines features of different software packages. Elite will package the Workspace and EiF software with existing solutions at no charge. Customer costs will be associated with potential hardware purchases (see PSR document), upgrading to minimum-supported Elite product versions and implementation services. Implementation services will be minimal and related to installation and basic end-user training for the user interface and the configuration program.

16. Which customers will have access to Workspace and EiF?
Workspace R1 will be provided to 3E and MatterSphere customers. EiF will also be provided to all customers utilizing the Elite Mobile application (v2). EiF is required for the Workspace Web and mobile experiences. Existing customers will be required to sign an addendum. New customer contracts will include EiF and/or Workspace as part of the product purchase.

17. Can a customer using only 3E or only MatterSphere use Workspace?
While the Workspace experience is richer with multiple products, it is offered in three separate yet related configurations: 3E and MatterSphere, 3E-Only and MatterSphere-Only. These will be available for both Workspace Web and the Workspace experience within Elite Mobile. The user experience across the three configurations will be similar where appropriate and different where one product lacks the functionality of the other. They are intentionally configured to be as similar as possible. The primary differences will be that the MatterSphere-Only configuration will offer home page navigation for contacts and documents, but will lack financial data and charts.

18. Will customers be required to use Workspace? Are they able to use Workspace Web or Elite Mobile without the other?
Customers are not required to utilize Workspace and it will be up to each whether to deploy Workspace Web and/or the Workspace experience within Elite Mobile at their discretion.

19. Will we offer integration to or allow integration with competing products, either on our own or allow customers to do so?
We will not offer nor will we allow integration with any other products with R1 other than those previously noted. For R1, we are limiting customers to basic and mainly cosmetic changes to the stock configurations. The next version will have licensing measures in place to control the enablement of third party product integration. Elite will reserve the right to not enable certain partner or third party product integrations.
20. What is the difference between Workspace and what SharePoint offers?

The Workspace concept is much more than a dashboard. The combination of components in the offering—Elite Integration Framework (EIF), the Workspace user interfaces (Web and Elite Mobile) and the Designer configuration program—set it apart. SharePoint can be many things, but in this context it is effectively a portal with views of data from other sources presented on a dashboard. If users actually want to do anything, they cannot do it within SharePoint; rather, they are taken to the source product to perform the action. Workspace R1 provides a similar experience (launching native products), yet it is only the beginning and not the end-goal. As evidenced by the native time-entry function available in Workspace, our goal is to allow users to work natively in Workspace to the greatest extent possible for all of their activities. EIF is also a differentiator. As future versions roll out, EIF will facilitate cross-product workflows, bi-directional (and multi-directional) data integration between products, entity merging, mobile solutions, enhanced security, and more that SharePoint does not offer.

21. What is Elite’s mobile strategy?

Elite Mobile is the embodiment of our mobile strategy. Rather than create a separate app for each product we will have a single app for all product lines facilitated by EIF and the mobile framework. Elite Mobile will offer different product experiences within the one application. Elite Mobile is currently in use for ProLaw and Envision and will soon be in use for Business Development Premier and Workspace. When a user signs in and authenticates via the Elite Mobile gateway, he/she will be presented with the proper product experience based on that registration, product(s) purchased, and specified configuration. In a future version, customers having multiple TRE products will be able to switch the product experience directly within the application. The Workspace experience within Elite Mobile itself will offer additional merged product experiences in future versions.

22. What are Elite Mobile and Workspace Mobile and how to they relate to 3E Mobile?

Elite Mobile is a single mobile application that provides the mobile product experience for a number of products including Workspace, Business Development, ProLaw, and Envision.

There is no specific “Workspace Mobile” application; rather, there is the Workspace experience within the Elite Mobile application. The Workspace experience combines 3E and MatterSphere data and information in a unified experience.

3E Mobile is our currently available mobile offering and is specific to the 3E product. It is a separate application in purpose, function, and appearance than the Elite Mobile application and the Workspace experience therein. Elite Mobile is the future path for 3E Mobile users. While 3E Mobile will be maintained for fixes, all new mobile features and functionalities will be included in the Elite Mobile app.

23. What are the differences between 3E Mobile and the Workspace experience within Elite Mobile?

As noted above, 3E Mobile is specific to the 3E product, whereas the Workspace experience within Elite Mobile can additionally provide data from MatterSphere and Autonomy.

3E Mobile currently provides the following functions that are not available for the Workspace experience within Elite Mobile:

- Proforma review and PDF annotation.
- Time entry expansion codes, month and day views and posting, editing and save to iPad options.
- Notifications for daily time entry and missing time.
- Mobile web option.

The Workspace experience within Elite Mobile provides the following functionality not available in 3E Mobile:

- Configurable for personas and user interface changes (e.g., add/remove fields, change color scheme, etc.).
- Multiple persona capable (four provided by default, additional ones can be added).
- Matter view.
- Client and matter related parties and contacts views.
- Document views for MatterSphere and Autonomy iManage DMS.
- My, Favorites and Recent list filter options.
- My, My Firm, My Office, My Department and My Section filter options for financial KPIs.
- Westlaw Next and Outlook Web Access options.
- Invoice view option within accounts receivable views.

24. What mobile devices do we support for the Workspace experience within Elite Mobile?

Elite Mobile is initially available for the iPad (iPad, Air, Mini) and requires iOS7.1 and above. iPads that do not support iOS 7.1 and higher are not supported for Elite Mobile.

iPhone support is currently targeted for late Q2 or early Q3 2014 release.

Additional operating system and device support will follow in future versions. At this time, we are not offering a mobile Web option for Elite Mobile.

25. What security and mobile device management (MDM) options are available for Elite Mobile?

Elite is currently evaluating options for the MDM software we will support. The current version of Elite Mobile does not integrate with or support any MDM software package.