DON’T FORGET YOUR PASSPORT

Find your VANTAGE PASSPORT in your conference bag. Then, redeem the tickets at the VANTAGE Expo Hall for opportunities to win these fabulous gifts:

**Treasure Chest**
Win $1,500 in prizes or gift certificates!
Sponsored by:

**VANTAGE Conference Gift**
Redeem this ticket for Bluetooth headphones!
Sponsored by:

**VANTAGE T-shirt**
Redeem this ticket for a VANTAGE T-shirt!
Sponsored by:

**VANTAGE Beach Towel**
Redeem this ticket for a VANTAGE beach towel!
Sponsored by:

**Gift Card Raffle**
Win $1,000 in American Express gift cards!
Sponsored by:

**Amazon Echo Raffle**
Win 1 of 3 Amazon Echoes!
Sponsored by:

**Gift Card Raffle**
Win a $500 American Express gift card!
Sponsored by:

**Gift Card Raffle**
Win 1 of 2 $250 Visa gift cards!
Sponsored by:

**VANTAGE Slot Machine Pull**
Sponsored by:
ClientPay
Wilson Legal Solutions
Source Consulting Group LLC
DW Reporting
Global Exchange
Bellefield Systems, LLC
MiniSoft, Inc.
At Thomson Reuters Elite, we are focused on ensuring that our clients have a cohesive VANTAGE conference. You can trust you are experiencing the highest quality events in the industry. As part of this unity, each year we showcase new artwork designed exclusively for the conference.

This year’s design was created for us by Hatch Show Print based inside the Omni Hotel in Nashville, TN, our 2016 worldwide conference hotel. They are one of the oldest working letterpress print shops in America. Using large, hand-carved wood blocks with iconic imagery printed in bold colors, they got their start by promoting vaudeville, circus, and minstrel shows across the country.

Over the years, their posters have featured a host of entertainers starting with the early stars of the Grand Ole Opry. Today, they design and print more than 500 posters per year for entertainers, venues, and businesses. Using compelling design and imagery, they captured this year’s VANTAGE location and key themes of connect, learn, and experience.

Get ready to experience VANTAGE and gain the perspective you need to take your business to the next level!

VANTAGE ATTENDEE GIFT
This year’s VANTAGE Attendee Gift is sponsored by our friends at Bellefield Systems. Inside your VANTAGE passport, you will find a ticket for this year’s gift. Be sure to stop by the Bellefield Systems booth # 211 (during Expo Hall hours) and exchange your ticket for the VANTAGE gift.

VANTAGE PRESENTATIONS AND HANDOUTS
Handouts for some of the VANTAGE tutorials as well as copies of most of the VANTAGE presentations can be found in the VANTAGE mobile app and on the Thomson Reuters Elite Community. The Community is accessed via the Thomson Reuters Elite Support Portal. There you can download or print these materials.

In addition, these items can be printed onsite at the VANTAGE Print Station near the Registration Counter.

VANTAGE WIRELESS NETWORK
The VANTAGE wireless network is available throughout the Omni Nashville Conference Area.

Network: VANTAGE
Password: Elite123
KEYNOTE AND GENERAL SESSION PANEL

VANTAGE KEYNOTE
Join us to hear Thomson Reuters Elite Management discuss the latest developments for all product lines as well as the world of technology, and how those developments are likely to affect law professionals.

GENERAL SESSION PANEL
The Ever Evolving Legal Landscape – Both Sides of the Coin
Join this session to hear how law firms and corporate legal departments are adapting to the changing legal landscape of increased cost pressures, information and data security, and performance and staffing expectations. Learn how each side is measuring AFAs and legal performance, balancing budget requirements, and showing value to the business. How have corporate legal departments’ expectations and business relationships with law firms evolved? How are law firms managing data and information security and protecting their clients’ information?

VANTAGE EXPERIENCE BOOTH
At Thomson Reuters Elite, we are committed to your success, which is why we want to see and hear from you during this year’s VANTAGE Worldwide Conference!
Stop by the VANTAGE Experience booth located next to the Country Music Hall of Fame Lobby to get hydrated with infused flavored water, see product demonstrations, and learn more about the client resources available to help you succeed. We have lots in store at the VANTAGE Experience booth for you, including:
• Your VANTAGE Nashville Elite conference bag – pick this up at the main counter.
• Participate and play the 3E Super Hero Game on the Padzilla! Enter the leader board, and you could win a $300 American Express Card!
• Learn about available client resources such as the Community and the Knowledge Base.
• Visit the VANTAGE Hydration Station – enjoy bottomless refills of flavored water throughout the conference!
• Relax and re-charge at the 3E Charging Station.
• Learn more about our newest product releases.
• Get questions answered and provide feedback on the VANTAGE mobile app.

Engage and get the knowledge you need to be even more successful! We’ve made it easy at the VANTAGE Experience booth.
Want to help your law firm run smarter?

Join the conversation with your peers and other thought leaders to discuss what firms and corporate legal departments are doing to prepare for key challenges and opportunities on the horizon in the legal industry.

These sessions will be facilitated by leaders from Thomson Reuters, who will share insights from Peer Monitor data and other sources regarding top trends. Each session will be attended by up to 40 of your peers, and the interactive format of these discussions will provide you with a great opportunity to share and gain knowledge on topics of interest.

**PARTICIPATE IN A SESSION OF YOUR CHOICE**

<table>
<thead>
<tr>
<th>Session</th>
<th>Date/Time</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bulletproof Data Security</strong></td>
<td>MONDAY, MAY 23, 1:15 P.M. – 2:15 P.M.</td>
<td>MUSIC ROW 5. What policies and protection is your firm investing in to keep data safe and compliant?</td>
</tr>
<tr>
<td><strong>Peer Monitor Industry Trend Overview</strong></td>
<td>MONDAY, MAY 23, 2:45 P.M. – 3:45 P.M.</td>
<td>MUSIC ROW 5. Learn what top trends are emerging in the legal industry based on recent data from Peer Monitor.</td>
</tr>
<tr>
<td><strong>Beauty Pageant vs. Moneyball</strong></td>
<td>TUESDAY, MAY 24, 9:45 A.M. – 10:45 A.M.</td>
<td>MUSIC ROW 5. How is the process for selecting outside counsel changing, and how is technology’s role evolving?</td>
</tr>
<tr>
<td><strong>The Intelligent Law Firm</strong></td>
<td>TUESDAY, MAY 24, 3:15 P.M. – 4:15 P.M.</td>
<td>MUSIC ROW 5. What types of business intelligence do your lawyers and C-levels rely on most today? What is missing?</td>
</tr>
<tr>
<td><strong>Clarifying the Cloud</strong></td>
<td>TUESDAY, MAY 24, 4:30 P.M. – 5:30 P.M.</td>
<td>MUSIC ROW 5. Where and how does the Cloud fit into your firm’s technology roadmap?</td>
</tr>
<tr>
<td><strong>Front Office Meets Back Office</strong></td>
<td>WEDNESDAY, MAY 25, 3:00 P.M. – 4:00 P.M.</td>
<td>MUSIC ROW 5. What key technologies and processes link the front office and back office in your firm?</td>
</tr>
</tbody>
</table>

To thank you for your contributions, each session participant will receive a **$10 Starbucks card** and be entered to win a **$100 Amazon.com gift card**.

*Limit one Starbucks card per person, available for first 40 attendees to join each round table.*
WELCOME RECEPTION

HOSTED BY PRODUCT MANAGEMENT

Please join us for the Welcome Reception hosted by Product Management on Sunday, May 22, 2016 from 5:00 P.M. to 7:00 P.M. in Legends Ballrooms A, B, and C.

You will find product and core client group signs throughout the ballrooms listing your products, such as ProLaw, 3E, Enterprise, International, eBillingHub, etc. This is a terrific opportunity to meet with other clients using the same products and to meet and talk with the product managers for those products.

Sunday, May 22, 2016
5:00 P.M. – 7:00 P.M.
Legends Ballrooms A, B, and C

PRODUCT NETWORKING MEALS

Meet others that use your same Thomson Reuters products. Look for product identification ribbons on each other’s badges as well as product identification banners and table signs at all VANTAGE seated meals.

- ProLaw
- Enterprise
- MatterSphere
- eBillingHub
- 3E
- Legal Tracker
USER GROUP MEETINGS

eBILLINGHUB
Whether you have been using eBillingHub for years or are a new user, we hope you will join us for the opportunity to share thoughts and ideas, hear about what is happening with eBillingHub, and have your questions answered. Historically, this has been a lively group, and we look forward to much of the same this year!

Monday, May 23, 1:15 P.M. – 2:15 P.M.
BASS

3E
The 3E user group is tailored to firms using 3E and is open to all 3E firms—those who have been running 3E for years and those who have just purchased 3E. Join 3E users from around the globe to exchange best practices and innovative ideas. 3E product management staff and Thomson Reuters Elite senior management will be on hand.

Monday, May 23, 1:15 P.M. – 2:15 P.M.
LEGENDS D

PROFESSIONAL SERVICES ORGANIZATIONS (PSO)
The PSO user group will meet to discuss topics unique to our non-law firm clients.

Wednesday, May 25, 1:30 P.M. – 2:30 P.M.
BASS

MATTERSPHERE
This is a great opportunity to sit down and network with your peers, share ideas and interests, and interact with members from the MatterSphere Team.

Wednesday, May 25, 3:00 P.M. – 4:00 P.M.
BASS

VANTAGE EXPO RECEPTION

Join us for the VANTAGE Expo Reception on Monday, May 23, from 5:30 P.M. to 7:30 P.M. in the VANTAGE Expo Hall. Stop by and visit your favorite Thomson Reuters partners and meet up with old and new friends.

This year’s VANTAGE Expo Reception is made possible by the generous sponsorship of our friends at

VANTAGE Exposalzation

 Monday, May 23, 2016
5:30 P.M. – 7:30 P.M.
Broadway Prefunction
VANTAGE GALA

Wednesday, May 25, 2016
6:30 P.M. – 10:00 P.M.

This event requires that you bring your name badge or specially purchased ticket to the event. Badges are non-transferable. A government-issued ID (driver license or passport) is required for entry as well. 21+ only.
Join us at the Shelby Street Bridge Building!

This year’s VANTAGE gala will be held at the Shelby Street Bridge Building located directly across the Shelby Street pedestrian bridge on the Cumberland River. The bridge building is a three story complex offering an indoor and outdoor experience and providing spectacular views of the historic pedestrian bridge and downtown Nashville. Once again, we will rock the house with a party atmosphere, dinner, drinks, and dancing as we close the VANTAGE conference. This is one party you will not want to miss!

The gala is included in all VANTAGE and Tracker Summit at VANTAGE conference registrations. Additional guest tickets will be available for purchase via credit or debit card at the VANTAGE Registration Counter from noon until 6:00 P.M. on Tuesday, May 24. Additional guest tickets are limited and are priced at $150.00.

How to get there
Weather permitting, it’s a 10-minute walk from the Nashville Omni over the Shelby Street pedestrian bridge. There will also be bus service that leaves the hotel starting at 6:30 P.M. and returns to the hotel on a half hour basis. Buses pick up and drop off on the Fifth Ave. side of the Nashville Omni.
## CONFERENCE SCHEDULE

### CONFERENCE SUMMARY

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Dates and Times</th>
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</thead>
<tbody>
<tr>
<td>Registration</td>
<td>Sunday 2:00 P.M. – 6:00 P.M.  Monday 7:00 A.M. – 5:30 P.M.  Tuesday 7:00 A.M. – 6:00 P.M.  Wednesday 8:00 A.M. – 3:00 P.M.</td>
</tr>
<tr>
<td>VANTAGE Experience Booth</td>
<td>Sunday 2:00 P.M. – 6:00 P.M.  Monday 7:00 A.M. – 5:30 P.M.  Tuesday 7:00 A.M. – 6:00 P.M.  Wednesday 8:00 A.M. – 3:00 P.M.</td>
</tr>
<tr>
<td>User Group Meetings</td>
<td>Monday 1:15 P.M. – 2:15 P.M.  eBillingHub and 3E  Wednesday 1:30 P.M. – 2:30 P.M.  Professional Services Organizations  3:00 P.M. – 4:00 P.M.  MatterSphere</td>
</tr>
<tr>
<td>Keynote</td>
<td>Monday 8:30 A.M. – 9:30 A.M.</td>
</tr>
<tr>
<td>General Session Panel</td>
<td>Tuesday 12:45 P.M. – 1:30 P.M.</td>
</tr>
<tr>
<td>Tutorials</td>
<td>Monday 4:00 P.M. – 5:30 P.M.  Tuesday 7:45 A.M. – 9:15 A.M.  9:45 A.M. – 10:45 A.M.  11:00 A.M. – 12:00 P.M.  3:15 P.M. – 4:15 P.M.  4:30 P.M. – 6:00 P.M.  Wednesday 8:00 A.M. – 10:00 A.M.  10:30 A.M. – 12:30 P.M.  1:30 P.M. – 2:30 P.M.</td>
</tr>
<tr>
<td>Expo Hall</td>
<td>Monday 9:30 A.M. – 7:45 P.M.  Tuesday 8:30 A.M. – 4:45 P.M.  Wednesday 8:00 A.M. – 3:00 P.M.</td>
</tr>
<tr>
<td>Learning Zone</td>
<td>Monday 9:30 A.M. – 4:30 P.M.  Tuesday 8:00 A.M. – 5:00 P.M.  Wednesday 8:00 A.M. – 3:00 P.M.</td>
</tr>
<tr>
<td>Thomson Reuters Elite Demo Suites</td>
<td>Monday 10:00 A.M. – 5:00 P.M.  Tuesday 8:00 A.M. – 5:00 P.M.  Wednesday 8:00 A.M. – 4:00 P.M.</td>
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</tbody>
</table>

### EVENTS

<table>
<thead>
<tr>
<th>Day</th>
<th>Time</th>
<th>Event Description</th>
<th>Location</th>
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<tbody>
<tr>
<td>Sunday</td>
<td>5:00 P.M. – 7:00 P.M.</td>
<td>Welcome Reception Hosted by Product Management  (casual attire)</td>
<td>Legends Ballrooms A, B, and C</td>
</tr>
<tr>
<td>Monday</td>
<td>5:30 P.M. – 7:30 P.M.</td>
<td>VANTAGE Expo Reception  Broadway Prefunction  (casual attire)</td>
<td></td>
</tr>
<tr>
<td>Wednesday</td>
<td>6:30 P.M. – 10:00 P.M.</td>
<td>VANTAGE After Dark  Shelby Street Bridge Building  (casual attire)</td>
<td></td>
</tr>
</tbody>
</table>
CPE CREDITS

All sessions and tutorials at VANTAGE are CPE-accredited.

To obtain CPE credits, you must have your badge scanned at the beginning and end of each day at the CPE Scan station near the Registration Counter.

After the event, an online affidavit at the address below needs to be filled out to complete the process and get the earned CPE credits.

CPE credits provided will depend on attendance and affidavit confirmation. Specific credits received will vary based on session choices.

Please note: Focus groups, executive sessions, client meetings, meals, and social activities are not eligible for CPE accreditation.

Online Affidavit: https://wlec.formstack.com/forms/2016elite

Questions? Contact elite.education.services@thomsonreuters.com

FOCUS AREAS

You will find the icons listed below throughout VANTAGE. Each icon represents a specific focus area within the firm, for example, Finance. The sessions and tutorials at VANTAGE have been designed for these focus areas. Some sessions and tutorials are applicable for multiple focus areas.

- BD: Business Development
- IT: IT/Technology
- M: Management
- R&C: Risk and Compliance
- T&L: Transactional/Litigation

VANTAGE MOBILE APP

Download the VANTAGE mobile app to your iPhone, iPad, or Android device to be sure you have all the latest conference information.

- View sessions and build your agenda
- Connect with fellow VANTAGE attendees
- Upload and view photos from the conference
- Provide feedback on sessions and tutorials
# Conference Schedule

**Monday, May 23, 2016**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:00 A.M. – 5:30 P.M.</td>
<td>Registration</td>
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<tr>
<td>7:30 A.M. – 8:30 A.M.</td>
<td>Breakfast  <a href="#">BROADWAY PREFUNCTION</a>  <a href="#">Sponsored by T4G Limited</a></td>
</tr>
<tr>
<td>8:30 A.M. – 9:30 A.M.</td>
<td>VANTAGE Keynote  <a href="#">BROADWAY BALLROOM</a></td>
</tr>
<tr>
<td>10:00 A.M. – 11:00 A.M.</td>
<td><strong>Enterprise Sessions</strong></td>
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<td><img src="#" alt="Image" /></td>
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<tr>
<td>11:15 A.M. – 12:15 P.M.</td>
<td><strong>General Interest Sessions</strong></td>
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<tr>
<td>12:15 P.M. – 1:00 P.M.</td>
<td><strong>Product Networking Lunch</strong>  <a href="#">BROADWAY BALLROOM</a>  <a href="#">Sponsored by Wilson Legal Solutions</a></td>
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<tr>
<td>1:15 P.M. – 2:15 P.M.</td>
<td><strong>Enterprise to 3E/3E Sessions</strong></td>
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<td></td>
<td><strong>ProLaw Sessions</strong></td>
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<td></td>
<td><strong>ProLaw Sessions</strong></td>
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</tbody>
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<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
</table>
| 2:15 P.M. – 2:45 P.M. | **VANTAGE Expo Hall Break**  
**BROADWAY PREFUNCTION**  
Using the Search Capabilities of the Cloud  
**ELECTRIC**  
**VANTAGE INSIGHTS AND OUTLOOKS**  
Peer Monitor: Industry Trend Overview  
**MUSIC ROW 5** |
|                  | **GENERAL INTEREST SESSIONS**  
Western Union Business Solutions for Law Firms: Streamline the Payment Process and Reduce Costs  
**CUMBERLAND 4**  
**MUSIC ROW 2** |
|                  | **VANTAGE INSIGHTS AND OUTLOOKS**  
Improving Your 3E Experience  
**CUMBERLAND 4**  
**MUSIC ROW 2** |
|                  | **ENTERPRISE SESSIONS**  
Business Development Premier: End to End Demonstration  
**MUSIC ROW 2** |
| 2:45 P.M. – 3:45 P.M. | (Sessions)  
Preparing for a 3E Implementation: A Post Mortem Case Study  
**LEGENDS A** |
|                  | **MATTERSPHERE SESSION**  
Introduction to MatterSphere  
**MUSIC ROW 3** |
|                  | **ENTERPRISE SESSIONS**  
Enterprise Write-ups and Write-downs Best Practices  
**LEGENDS B** |
|                  | **ENTERPRISE TO 3E SESSIONS**  
Getting Ahead and Uncovering Strategic Benefits Before a System Conversion or Migration Begins  
**MUSIC ROW 4** |
| 3:45 P.M. – 4:15 P.M. | **3E SESSIONS**  
Making Big Changes Easy: 3E Billing Utilities  
**BASS** |
|                  | **3E SESSIONS**  
Securing 3E: Process and Data Level Security  
**CUMBERLAND 5** |
|                  | **ENTERPRISE TO 3E SESSIONS**  
3E Conflicts: Recent Developments and What’s to Come  
**CUMBERLAND 6** |
|                  | **ENTERPRISE TO 3E SESSIONS**  
The AP Purchase to Pay Cycle  
**LEGENDS F** |
|                  | **PROLAW SESSIONS**  
3E Reporting for Risk Professionals  
**LEGENDS G** |
|                  | **PROLAW SESSIONS**  
ProLaw Back Office Round Table  
**CUMBERLAND 1** |
|                  | **ENTERPRISE TO 3E SESSIONS**  
ProLaw User Groups and More  
**CUMBERLAND 2** |
| 4:00 P.M. – 5:30 P.M. | **GENERAL INTEREST TUTORIALS**  
Crafting E-billing Experts  
**CUMBERLAND 4** |
|                  | **GENERAL INTEREST TUTORIALS**  
Using Design Gallery’s Visual Designer  
**CUMBERLAND 5** |
|                  | **ENTERPRISE SESSIONS**  
Integrating Image Connect with Enterprise and WebView  
**BASS** |
|                  | **ENTERPRISE TUTORIALS**  
Enterprise 3.10 and 3.11 Billing Manager Enhancements Review  
**LEGENDS B** |
|                  | **ENTERPRISE TO 3E TUTORIALS**  
Standard Enterprise Reports  
**LEGENDS C** |
|                  | **ENTERPRISE SESSIONS**  
Complex Billing  
**ELECTRIC** |
|                  | **3E TUTORIALS**  
Meeting Your Business Needs Today While Prepping Your Data for 3E  
**LEGENDS A** |
|                  | **ENTERPRISE TO 3E TUTORIALS**  
Compare and Contrast: Reporting  
**LEGENDS E** |
|                  | **3E TUTORIALS**  
3E Workflows You Can’t Live Without  
**CUMBERLAND 6** |
|                  | **3E TUTORIALS**  
All You Need to Close Your 3E Month  
**LEGENDS F** |
|                  | **3E TUTORIALS**  
Introducing 3E Financial Reporting 2.0  
**LEGENDS G** |
|                  | **3E TUTORIALS**  
Duplicates Be Gone!  
**MUSIC ROW 3** |
|                  | **PROLAW SESSIONS**  
ProLaw in the Cloud: Things to Consider  
**CUMBERLAND 1** |
|                  | **PROLAW SESSIONS**  
Control Data Quality: Managing Your ProLaw Contacts  
**CUMBERLAND 2** |
| 5:30 P.M. – 7:30 P.M. | **VANTAGE Expo Reception**  
**VANTAGE EXPO HALL**  
Sponsored by DW Reporting |
## CONFERENCE SCHEDULE

**TUESDAY, MAY 24, 2016**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 A.M. – 6:00 P.M.</td>
<td>Registration</td>
<td></td>
</tr>
<tr>
<td>7:00 A.M. – 7:45 A.M.</td>
<td>Product Networking Breakfast</td>
<td>BROADWAY BALLROOM</td>
</tr>
<tr>
<td>7:45 A.M. – 9:15 A.M.</td>
<td><strong>GENERAL INTEREST TUTORIALS</strong></td>
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<tr>
<td></td>
<td>Workspace Customization with 3E, Mattersphere, and Business Development Premier Integration</td>
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<td>MATTERSHERE SESSION</td>
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<td></td>
<td>The Greatest Hits of MatterSphere Configurations and Customizations</td>
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<tr>
<td>7:45 A.M. – 9:15 A.M.</td>
<td>ENTERPRISE SESSIONS</td>
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<tr>
<td></td>
<td>Enterprise 3.10 and 3.11 AP and GL Enhancements Review</td>
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<td></td>
<td>ENTERPRISE TO 3E TUTORIAL</td>
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<td></td>
<td>Compare and Contrast: AP and GL Enhancements Review</td>
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<td>ENTERPRISE SESSION</td>
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<td>Enterprise 3.10 and 3.11 AP and GL Enhancements Review</td>
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<tr>
<td>9:15 A.M. – 9:45 A.M.</td>
<td><strong>GENERAL INTEREST SESSIONS</strong></td>
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<tr>
<td></td>
<td>International Payments and Elite Integration: A Revolution of Process Improvement</td>
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<tr>
<td>9:45 A.M. – 10:45 A.M.</td>
<td><strong>GENERAL INTEREST SESSIONS</strong></td>
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<td>Enterprise Volume Discounts</td>
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<td>ENTERPRISE TO 3E SESSIONS</td>
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<tr>
<td></td>
<td>Enterprise 3.10 and 3.11 AP and GL Enhancements Review</td>
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<tr>
<td>10:45 A.M. – 11:45 A.M.</td>
<td><strong>GENERAL INTEREST SESSIONS</strong></td>
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<tr>
<td></td>
<td>Gain Efficiencies Using the Events Module</td>
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</tbody>
</table>

**VANTAGE Expo Hall Break**

**BROADWAY PREFUNCTION**

Sponsored by Select® Associates, Inc.

<table>
<thead>
<tr>
<th>Location</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>CUMBERLAND 1</td>
<td>ProLaw Groupware Integration for Exchange Options and Best Practices</td>
</tr>
<tr>
<td>CUMBERLAND 2</td>
<td>Change Management</td>
</tr>
<tr>
<td>CUMBERLAND 3</td>
<td>ProLaw Groupware Integration for Exchange Options and Best Practices</td>
</tr>
</tbody>
</table>
### TUESDAY, MAY 24, 2016 (CONT.)

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Session Name</th>
</tr>
</thead>
</table>
| 11:00 A.M. – 12:00 P.M. (Tutorial/Sessions) |  | Follow-up Bills and Interest Best Practices (LEGENDS C)  
| 11:00 A.M. – 12:00 P.M. (Tutorial/Sessions) |  | WebbView Time Entry: Tips and Tricks (LEGENDS G)  
| 11:00 A.M. – 12:00 P.M. (Tutorial/Sessions) |  | Compare and Contrast: Multicurrency Part II (LEGENDS E)  
| 11:00 A.M. – 12:00 P.M. (Tutorial/Sessions) |  | Why 3E? Making the Decision to Move to 3E (BASS)  
| 12:00 P.M. – 12:45 P.M. |  | Keys to a Successful 3E Conversion (ELECTRIC)  
| 12:00 P.M. – 12:45 P.M. |  | Managing Electronic Records (ACOUSTIC)  
| 12:00 P.M. – 12:45 P.M. |  | New Features for 3E Split Billing (LEONDS D)  
| 12:45 P.M. – 1:30 P.M. |  | 3E Performance Update (LEONDS F)  
| 12:00 P.M. – 12:45 P.M. |  | Persona-based Dashboard Presentations (MUSIC ROW 2)  
| 12:00 P.M. – 12:45 P.M. |  | The Elite Data Warehouse and Future Reporting and Business Intelligence Strategies (MUSIC ROW 3)  
| 12:00 P.M. – 12:45 P.M. |  | Discover the Elite Services Bus: Aka BizTalk (MUSIC ROW 5)  
| 12:45 P.M. – 1:30 P.M. |  | Analysis and Tuning of Your MSSQL Database (CUMBERLAND 1)  
| 12:45 P.M. – 1:30 P.M. |  | ProLaw Reports: Troubleshooting and Maintenance (CUMBERLAND 2)  
| 12:45 P.M. – 1:30 P.M. |  | Using ProLaw for Your Firm’s Marketing (CUMBERLAND 3)  
| 12:45 P.M. – 1:30 P.M. |  | ARCSZG: Implementing and Managing Financial Strategies (MUSIC ROW 4)  
| 1:45 P.M. – 2:45 P.M. (Sessions) |  | Legal Business Intelligence That Works (MUSIC ROW 5)  
| 1:45 P.M. – 2:45 P.M. (Sessions) |  | Introducing Monitoring and Diagnostics (ELECTRIC)  
| 1:45 P.M. – 2:45 P.M. (Sessions) |  | Unleash the Power of the 3E General Ledger (LEONDS E)  
| 1:45 P.M. – 2:45 P.M. (Sessions) |  | Our Favorite 3E Features (LEONDS G)  
| 2:45 P.M. – 3:15 P.M. |  | What is the Elite Conversion Engine? (MUSIC ROW 2)  
| 2:45 P.M. – 3:15 P.M. |  | ProLaw Support: Basic Troubleshooting (CUMBERLAND 1)  
| 2:45 P.M. – 3:15 P.M. |  | Technical Administration of .NET Pro Filing and Mobile (CUMBERLAND 2)  
| 2:45 P.M. – 3:15 P.M. |  | Billing and Collection Efforts Using Front Office Features (CUMBERLAND 3)  
| 2:45 P.M. – 3:15 P.M. |  | VANTAGE Expo Hall Break  
| 2:45 P.M. – 3:15 P.M. |  | VANTAGE Insights and Outlooks  
| 3:15 P.M. – 4:15 P.M. (Tutorial/Sessions) |  | Enterprise Conflicts to 3E Conflicts from the User Perspective (LEONDS F)  
| 3:15 P.M. – 4:15 P.M. (Tutorial/Sessions) |  | Learn From Your Peers: Anatomy of an Enterprise to 3E Conversion (MUSIC ROW 2)  
| 3:15 P.M. – 4:15 P.M. (Tutorial/Sessions) |  | ProLaw Agent: Let It Work For You (CUMBERLAND 2)  

### Session Notes
- **GENERAL INTEREST SESSION**
  - Elite: Future Architecture (LEGENDS F)
  - Legal Business Intelligence That Works (MUSIC ROW 5)
  - What is the Elite Conversion Engine? (MUSIC ROW 2)
  - My Favorite ProLaw Features (CUMBERLAND 3)

- **MATTERSPHERE SESSION**
  - MatterSphere Document Production (BASS)
  - Introducing Monitoring and Diagnostics (ELECTRIC)
  - ProLaw Support: Basic Troubleshooting (CUMBERLAND 1)
  - Technical Administration of .NET Pro Filing and Mobile (CUMBERLAND 2)

- **ENTERPRISE SESSIONS**
  - Enterprise Recurring Fees (MUSIC ROW 3)
  - Unleash the Power of the 3E General Ledger (LEONDS E)
  - Billing and Collection Efforts Using Front Office Features (CUMBERLAND 3)
  - Tips and Tricks in Credits (MUSIC ROW 4)

- **ENTERPRISE/3E SESSION**
  - Enterprise Conflicts to 3E Conflicts from the User Perspective (LEONDS F)
  - Learn From Your Peers: Anatomy of an Enterprise to 3E Conversion (MUSIC ROW 2)

- **PROLAW SESSIONS**
  - Discovering the Elite Services Business (MUSIC ROW 5)
  - The Elite Data Warehouse and Future Reporting and Business Intelligence Strategies (MUSIC ROW 3)

- **3E SESSIONS**
  - New Features for 3E Split Billing (LEONDS D)
  - 3E Performance Update (LEONDS F)

- **3E SESSIONS**
  - Discover the Elite Services Business: Aka BizTalk (MUSIC ROW 5)

- **PROLAW SESSIONS**
  - Discovering the Elite Services Business (MUSIC ROW 5)

- **PROLAW TUTORIAL**
  - My Favorite ProLaw Features (CUMBERLAND 3)

- **ENTERPRISE TO 3E SESSION**
  - Legal Business Intelligence That Works (MUSIC ROW 5)
  - Introducing Monitoring and Diagnostics (ELECTRIC)
  - Enterprise Conflicts to 3E Conflicts from the User Perspective (LEONDS F)
  - Learn From Your Peers: Anatomy of an Enterprise to 3E Conversion (MUSIC ROW 2)
# CONFERENCE SCHEDULE

## TUESDAY, MAY 24, 2016 (CONT.)

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Type</th>
<th>General Interest Session</th>
<th>Vantage Insights and Outlooks</th>
<th>Enterprise Tutorials</th>
</tr>
</thead>
<tbody>
<tr>
<td>4:30 P.M. – 6:00 P.M.</td>
<td>Enterprise to 3e Tutorial</td>
<td>Compare and Contrast: Billing</td>
<td>3e Implementation: Implementation Methodology</td>
<td>Why Did Elite Write 3e?</td>
</tr>
<tr>
<td></td>
<td>Enterprise to 3e Sessions</td>
<td>Best Practices for Administering ProLaw</td>
<td>Custom Tab Setup in ProLaw</td>
<td>Building a Custom Portal in 3e</td>
</tr>
<tr>
<td></td>
<td>General Interest Session</td>
<td>Entity, Client and Matter Maintenance for Intake, Conflicts, and Records Users</td>
<td>Finding data from the Prolaw</td>
<td>DATABASE USING SQL Language</td>
</tr>
</tbody>
</table>

## WEDNESDAY, MAY 25, 2016

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Type</th>
<th>Registration</th>
<th>Product Networking Breakfast</th>
<th>General Interest Session</th>
<th>Mattersphere Tutorial</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 A.M. – 3:00 P.M.</td>
<td>General Interest Session</td>
<td>Workspace and Mobile: What’s New and Roadmap</td>
<td>How to Extend Mattersphere</td>
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</tr>
<tr>
<td>7:00 A.M. – 8:00 A.M.</td>
<td>Enterprise Tutorials</td>
<td>Compare and Contrast: Data Structures and Framework</td>
<td>Enterprise to 3e: A Strategy Blueprint</td>
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</tr>
<tr>
<td>8:00 A.M. – 10:00 A.M.</td>
<td>3E Tutorials</td>
<td>Improving the 3E Balancing Experience</td>
<td>Train the Trainer: ProLaw New Hire and Continuing Education</td>
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<tr>
<td></td>
<td>PROLaw Tutorials</td>
<td>Upgrading to .NET? Ideas on How To Make It Successful</td>
<td>Reveal the Anomalies of ProLaw Querying</td>
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</tr>
<tr>
<td></td>
<td>PROLaw Sessions</td>
<td>WIP Costs in ProLaw and Month-end Balancing</td>
<td>How To Create and Assemble ProLaw Document Templates</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Type</th>
<th>Vantage Expo Hall Break</th>
<th>General Interest Session</th>
<th>Enterprise Tutorial</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00 A.M. – 10:30 A.M.</td>
<td>General Interest Session</td>
<td>Enterprise Balancing Best Practices</td>
<td>Finding Answers in the Knowledge Base and Collaborating Using the Elite Community</td>
<td></td>
</tr>
<tr>
<td>10:30 A.M. – 12:30 P.M.</td>
<td>Enterprise Tutorials</td>
<td>The Power of 3E Masking</td>
<td>Enterprise Billing Data Structures</td>
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</tr>
<tr>
<td></td>
<td>PROLaw Tutorials</td>
<td>Disaster Recovery: Are You Ready?</td>
<td>Finding Data From the ProLaw Database Using SQL Language</td>
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</tr>
</tbody>
</table>
# Vantage 2016

## Worldwide Conference • May 23 – 25 Nashville

## Wednesday, May 25, 2016 (Cont.)

<table>
<thead>
<tr>
<th>Time</th>
<th>Event Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:30 P.M. – 1:15 P.M.</td>
<td>Product Networking Lunch</td>
<td>Broadway Ballroom</td>
</tr>
<tr>
<td>1:30 P.M. – 2:30 P.M. (Tutorial/Sessions)</td>
<td>General Interest Sessions (Continued)</td>
<td></td>
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<tr>
<td></td>
<td><strong>A Law Firm’s Vision for Workspace and Mobile</strong></td>
<td>Cumberland 4</td>
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<tr>
<td></td>
<td><strong>Executive Insider Panel</strong></td>
<td>Cumberland 5</td>
</tr>
<tr>
<td></td>
<td><strong>Mobile: What Do You Want To Do Today?</strong></td>
<td>Cumberland 6</td>
</tr>
<tr>
<td></td>
<td><strong>Enterprise Data Mining Tips and Tricks</strong></td>
<td>Music Row 3</td>
</tr>
<tr>
<td></td>
<td><strong>Compare and Contrast: Conflicts and Records</strong></td>
<td>Legends E</td>
</tr>
<tr>
<td></td>
<td><strong>Sneak Peek: Paperless Proforma for 3E</strong></td>
<td>Electric</td>
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<tr>
<td></td>
<td><strong>What Is the Express Services Package (ESP) Methodology?</strong></td>
<td>Legends D</td>
</tr>
<tr>
<td></td>
<td><strong>3E Administration, Performance, and Troubleshooting</strong></td>
<td>Legends F</td>
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<tr>
<td></td>
<td><strong>3E Metrics, Reports, and Presentations</strong></td>
<td>Legends G</td>
</tr>
<tr>
<td></td>
<td><strong>Financial Reporting Round Table</strong></td>
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<tr>
<td>2:30 P.M. – 3:00 P.M.</td>
<td>Vantage Expo Hall Break</td>
<td>Broadway Prefunction</td>
</tr>
<tr>
<td>3:00 P.M. – 4:00 P.M. (Sessions)</td>
<td>General Interest Sessions (Continued)</td>
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<tr>
<td></td>
<td><strong>Meet the Thomson Reuters Elite Client Advisory Board</strong></td>
<td>Cumberland 5</td>
</tr>
<tr>
<td></td>
<td><strong>Law Firm Data: The Shortest Path to Revenue</strong></td>
<td>Electric</td>
</tr>
<tr>
<td></td>
<td><strong>The Frontier Experience… Virtually</strong></td>
<td>Legends D</td>
</tr>
<tr>
<td></td>
<td><strong>Welcome to Design Gallery 3.0!</strong></td>
<td>Music Row 3</td>
</tr>
<tr>
<td></td>
<td><strong>Front Office Meets Back Office</strong></td>
<td>Music Row 5</td>
</tr>
<tr>
<td></td>
<td><strong>Basic Troubleshooting in Enterprise Using SQL</strong></td>
<td>Music Row 4</td>
</tr>
<tr>
<td></td>
<td><strong>Implementing 3E Faster and More Efficiently</strong></td>
<td>Music Row 2</td>
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<tr>
<td></td>
<td><strong>What Is OQL and How You Can Improve Your Use of It</strong></td>
<td>Cumberland 1</td>
</tr>
<tr>
<td></td>
<td><strong>Records Management Round Table</strong></td>
<td>Cumberland 2</td>
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<tr>
<td></td>
<td><strong>Managing Your Lawyer: Self-service with 3E</strong></td>
<td>Cumberland 3</td>
</tr>
<tr>
<td></td>
<td><strong>3E Conflicts Tips and Tricks</strong></td>
<td>Cumberland 4</td>
</tr>
<tr>
<td></td>
<td><strong>3E FX Revaluation</strong></td>
<td>Legends E</td>
</tr>
<tr>
<td></td>
<td><strong>Best Practices in 3E Customizations</strong></td>
<td>Legends F</td>
</tr>
<tr>
<td>6:30 P.M. – 10:00 P.M.</td>
<td>Vantage After Dark</td>
<td>Shelby Street Bridge Building</td>
</tr>
</tbody>
</table>
GENERAL INTEREST TUTORIALS

MONDAY, MAY 23, 2016

4:00 P.M. – 5:30 P.M.

Crafting E-billing Experts
Presented by Paula Montgomery, Christine Smith, Kasey Kellum, and Renee Thames

E-billing may be a narrow focus, but there’s a depth of knowledge required to become an expert. Join us for sample sessions of our eBillingHub Training and eBillingHub Certification programs, as well as an overview of the benefits of an eBillingHub Process Review, and you can be a leader in this still-growing field.

CUMBERLAND 4

Using Design Gallery’s Visual Designer
Presented by Matt Klem and Randy Roy

Whether you are an existing 2.x or 3.x Design Gallery customer or are considering moving to Design Gallery, this tutorial will guide you through creating document components via a visual Microsoft Word-like experience. Learn all of the tips and tricks to building components in Design Gallery’s Visual Designer. From basic field insertions to complex logic, you’ll see it all here.

CUMBERLAND 5

TUESDAY, MAY 24, 2016

7:45 A.M. – 9:15 A.M.

Workspace Customization with 3E, MatterSphere, and Business Development Premier Integration
Presented by Avneet Sahni and Ryan Schultz

Want to use Workspace to increase your mobile abilities? Come learn how to add your custom fields or calculations in order to show data the way your firm wants to see it.

ACOUSTIC

Re-envisioning the Hub: The Future of eBillingHub
Presented by Greg Nilsen

While eBillingHub continues to roll along, our team recognizes that an injection of new life into the product is needed. Join our Product Manager Greg Nilsen to get a first look at the new product and what is in store for the future of eBillingHub.

CUMBERLAND 3

Creating Document Process Flows in Design Gallery 3.0
Presented by Jason Whalen and Matt Klem

From how your document is converted, to its final destination, learn all about Design Gallery process flows, a new concept in Design Gallery 3.0+. Whether it’s a simple save and print, or some other distribution channel, our new release will help you flexibly manage your entire document generation and distribution processes.

LEGENDS F

WEDNESDAY, MAY 25, 2016

10:30 A.M. – 12:30 P.M.

That’s Not All! A Look at New eBillingHub Features
Presented by Robyn Yandrlic and Jacob Hershey

Step right up for an in-depth look at the latest eBillingHub features, including the brand new custom validations configurations. See how these can reduce your rejection rates and improve your e-billing experience.

BASS
GENERAL INTEREST SESSIONS

MONDAY, MAY 23, 2016

11:15 A.M. – 12:15 P.M.

Workspace and Mobile Intro Tour: 3E, MatterSphere, and Business Development Premier in a Single User Interface for the Lawyer
Presented by Paul Matschi and Lucas Garlepp
View a live demonstration of how a lawyer can get their job done in an intuitive user interface that seamlessly brings together 3E, MatterSphere, and Business Development Premier.

Design Gallery Roadmap
Presented by Jason Taylor and Jason Whalen
Lots of exciting things are happening with Design Gallery. Get a glimpse into our upcoming v3.0.0 release which provides many significant improvements. Look at where the product is going with features planned for future releases.

Business Development: What’s New and Roadmap
Presented by Kyra Olson, Priya Ramaswamy, and Lisa Steigerwald
What’s new with Business Development Premier and where is it headed? The Product Management Team will highlight the most exciting features released over the past year and provide insights into the future roadmap direction.

1:15 P.M. – 2:15 P.M.

Unlock the Mysteries of Searching the Knowledge Base
Presented by Dan Wesol
Having difficulties finding just what you want to know? Looking for version release notes? Need some additional training? Learn the ins and outs of searching the Elite Knowledge Base to find answers to common questions.

Surviving a Finance Systems Merger
Presented by Richard Savage, Charles Russell Speechlys LLP
Merging two different financial systems is always a challenge. Two medium-sized London firms with European and Middle East offices went through this process last year, merging Aderant Expert into Enterprise. This session will cover a non-technical overview of the experience from the point-of-view of a financial systems analyst about the challenges encountered, what went right, and what went wrong. Other topics covered will include resourcing, leadership, communication, buy-in, gaps in expectations, and setting the scope.
GENERAL INTEREST SESSIONS

MONDAY, MAY 23, 2016

2:45 P.M. – 3:45 P.M.

Using the Search Capabilities of the Cloud
Presented by Alan Flower
Microsoft Azure offers superb performance and scaling for enterprise search scenarios. See how Elite has been using this platform and how it can be a solution to your search requirements.

Western Union Business Solutions for Law Firms: Streamline the Payment Process and Reduce Costs
Presented by Brian Curley, Western Union Business Solutions
For over 30 years, Western Union Business Solutions has been a leading provider of international and domestic payment solutions for law firms. This session will cover best practices for processing foreign invoices and sending international payments while reducing cost and time through a streamlined process with our partners Elite and Chrome River.

Business Development Premier: End to End Demonstration
Presented by Paul Odette
Come see a complete demonstration of Business Development Premier and how it integrates with 3E and Enterprise for time and billing information. This powerful solution helps finance and marketing teams collaborate and drive business development activities that will bring more opportunity to law firm growth efforts.

4:00 P.M. – 5:30 P.M.

Elite Developer Panel
Presented by Harun Diri and Brad Reaves
Join us to hear this panel conduct an open Q&A on development topics.

TUESDAY, MAY 24, 2016

9:45 A.M. – 10:45 A.M.

International Payments and Elite Integration: A Revolution of Process Improvement
Presented by Anthony Loiacono, Global Exchange
In today’s global economy, managing risk by protecting the firms’ international payment and cost recovery process is not only smart—it’s essential. This session will focus on the invoice » billing » payment lifecycle, including ONEStep™ invoice processing, data capture, exchange rate protection, EnhancedFX Elite integration, compliance protection, vendor remittance, and global funds transfer. This addresses knowing what has been billed in matter currency—without currency fluctuation risk when the payment is due. Learn about the current issues facing cost recovery for international payments and practical, effective strategies to implement an improved international payment environment. As a pioneer of direct invoice processing, Global Exchange transcends the existing law firm workflow into an improved process. This enables firms to maintain 100% control of the process with full integration into Elite.

Client Advocacy Program
Presented by Joe Calioway
Joe will share key points from his latest book: Magnetic: The Art of Attracting Business. Learn how to build your business based on a customer-centric strategy. Learn how to simplify the way you think about your business so that everyone in your organization shares a common focus on creating consistent customer experiences that generate customer satisfaction and grow the business. Do what the best companies in the world do to not only create, but sustain success in the marketplace. Be intentional, strategic, and tactically focused on knowing exactly what to do that will make you a magnet for new business.
Ideate: The Future of Legal Business Intelligence
Presented by Brian Taaffe and Greg Murphy, both of Wilson Legal Solutions
We know you’re tired of business intelligence vendors that are only good at one thing. You want a solution (and vendor) that can provide you with the tools and data to build out your business intelligence ecosystem. Look no further. Join us and learn how Ideate can transform your business [insights] by giving the right people access into the right metrics, allowing all users—from management to first-year associates—to see actionable statistics that will help them perform better, and more efficiently, at their jobs. Ideate will bring your firm into the next generation of analytics and reporting, from a full dashboarding suite with responsive design to accommodate an ever-changing technology market to user friendly tools and applications tailored to the various users within your firm. Ideate: the complete solution you have been waiting for.

WEDNESDAY, MAY 25, 2016

12:45 P.M. – 1:30 P.M.

The Ever Evolving Legal Landscape: Both Sides of the Coin
Moderated by Molly Dodge, Capital One’s Legal Management Group
Join this session to hear how law firms and corporate legal departments are adapting to the changing legal landscape of increased cost pressures, information and data security, and performance and staffing expectations. Learn how each side is measuring AFA’s and legal performance, balancing budget requirements, and showing value to the business. How have corporate legal departments’ expectations and business relationships with law firms evolved? How are law firms managing data and information security and protecting their clients’ information?

1:45 P.M. – 2:45 P.M.

Elite: Future Architecture
Presented by Brad Reaves
Join us for a look at how the architecture team at Elite is changing the way we write our applications to be more interoperable, scalable, and flexible.

4:30 P.M. – 6:00 P.M.

eBillingHub Panel Discussion: E-billing Workflow Management
Presented by Christine Smith
Come join the discussion as both a panel of your peers and eBillingHub experts converse on best practices for managing the e-billing workflow. From quicker submissions to making sure that invoices are getting paid, learn how other firms are tackling e-billing challenges and how your firm can keep operating smoothly.

8:00 A.M. – 10:00 A.M.

Design Gallery: Solution Development Best Practices and Troubleshooting
Presented by Matt Klem and Randy Roy
Learn the ins and outs of how to properly design Design Gallery solutions so that they follow best practices. This session is applicable to both Design Gallery 2.x and 3.x users. We also will highlight key changes made in version 3 that help enforce certain best practices during solution development.

Workspace and Mobile: What’s New andRoadmap
Presented by Paul Odette and Paul Matschi
Learn about where we are and where we’re going with Workspace and Mobile – the lawyer user experience that brings together 3E, MatterSphere, Business Development Premier, and other applications within your firm.
GENERAL INTEREST SESSIONS

WEDNESDAY, MAY 25, 2016

10:30 A.M. – 12:30 P.M.

Finding Answers in the Knowledge Base and Collaborating Using the Elite Community
Presented by Dan Wesol and Debbie Szumylo
Discover how to search the Knowledge Base effectively, find answers to your questions, view training videos, and troubleshoot problems. Bring your questions and see how the Knowledge Base can be your solution center. Learn how to use the Elite Community to collaborate with Thomson Reuters Elite end users, discuss best practices, and see how other firms are resolving challenges.

1:30 P.M. – 2:30 P.M.

A Law Firm’s Vision for Workspace and Mobile
Presented by Paul Odette and Doug Doerfler, Stinson Leonard Street
Join us as a law firm shares its vision and current status with Workspace and Mobile.

EXECUTIVE

Executive Insider Panel
Presented by Elisabet Hardy, Justin Farmer, Patrick Hurley, Marty Brej, Janet Murray, Eric Ruud, Bill Burch, and Eric Sugden
During this round table discussion, the executive leadership for Thomson Reuters Elite will be on hand to answer your questions about Elite products and services. This session is specific for those firms that run 3E, Enterprise, Business Development Premier, Business Development, MatterSphere, ProLaw, and eBillingHub.

CUMBERLAND 5

3:00 P.M. – 4:00 P.M.

Meet the Thomson Reuters Elite Client Advisory Board
Presented by Patrick Hurley and Elisabet Hardy
In this session, meet some of the members of the Thomson Reuters Elite Client Advisory Board. The board was formed over a year ago and consists of leaders within the law firm technology community as well as Thomson Reuters Elite executives. Hear about their efforts in championing client advocacy where the Elite products are concerned.

CUMBERLAND 5

Law Firm Data: The Shortest Path to Revenue
Presented by Gabriela Isturitz and Mike Stafiej, both of Bellefield Systems
Are you looking to increase revenue at your firm? One of the best kept secrets of the most competitive law firms today is data. As New York Time bestselling author Malcolm Gladwell has said “How to get someone to make the right decision when they don’t want to? DATA.” Don’t underestimate the power of data in driving growth-focused decision making at your firm. This session will explore how the modern law firm can use data to improve time entry accuracy and velocity, minimize write-offs, and increase revenue (without forcing lawyers to work more).

ELECTRIC

The Frontier Experience... Virtually
Presented by Justin Farmer and Jennifer Singh, Thomson Reuters
This is a unique opportunity to look inside the Thomson Reuters research labs and see what we are exploring in the areas of cognitive computing, virtual and augmented reality, and virtual assistants. Learn how Thomson Reuters is innovating for the future and what technology trends they are watching for in the business and legal industries. Demonstrations will showcase how these technologies could be applied to solve real customer problems. If technical innovation interests you, this is one session that you can’t miss!

LEGENDS D

Welcome to Design Gallery 3.0!
Presented by Jason Taylor and Jason Whalen
This major release of Design Gallery includes fundamental changes to how documents are created and distributed. Join us for an end-to-end demo as we guide you through the entire 3.0 experience, showing how you can be in control of your entire document automation processes.

MUSIC ROW 3
VANTAGE INSIGHTS AND OUTLOOKS SESSIONS

MONDAY, MAY 23, 2016

1:15 P.M. – 2:15 P.M.
Bulletproof Data Security
Presented by Gerry Lattimer
What policies and protection is your firm investing in to keep data safe and compliant?

2:45 P.M. – 3:45 P.M.
Peer Monitor Industry Trend Overview
Presented by Cory Branden
Learn what top trends are emerging in the legal industry based on recent data from Peer Monitor.

TUESDAY, MAY 24, 2016

9:45 A.M. – 10:45 A.M.
Beauty Pageant vs. Moneyball
Presented by Myles Van Leuven
How is the process for selecting outside counsel changing, and how is technology’s role evolving?

3:15 P.M. – 4:15 P.M.
The Intelligent Law Firm
Presented by Lisa Brown
What types of business intelligence do your lawyers and C-levels rely on most today? What is missing?

4:30 P.M. – 5:30 P.M.
Clarifying the Cloud
Presented by Ruby Lee
Where and how does the Cloud fit into your firm’s technology roadmap?

WEDNESDAY, MAY 25, 2016

3:00 P.M. – 4:00 P.M.
Front Office Meets Back Office
Presented by Paul Odette
What key technologies and processes link the front office and back office in your firm?
TUTORIAL

WEDNESDAY, MAY 25, 2016

8:00 A.M. – 10:00 A.M.

How to Extend MatterSphere
Presented by Allan Wheatley
Learn how to go beyond out-of-the-box MatterSphere and use it as a palette to customize to your firm’s requirements.

SESSIONS

MONDAY, MAY 23, 2016

11:15 A.M. – 12:15 P.M.

Taking MatterSphere Outside the Office: For Your Mobile Users and Your Clients
Presented by David Bradley and Duncan Hannigan
The 9 to 5 office role is long gone. So why should you need to be at your desk to work, and why should your clients have to call you up whenever they need information about their case? Come and see how we are extending the horizons of MatterSphere through Elite Mobile on smartphones and tablets, and how we are changing the way law firms interact with their clients in the MatterSphere Client Portal.

1:15 P.M. – 2:15 P.M.

Matter Management: What’s New and Roadmap
Presented by Chris Lamb and Paul Odette
Join us as we discuss a year in review since the last user conference, previews of upcoming releases, and our roadmap for the future.

2:45 P.M. – 3:45 P.M.

Introduction to MatterSphere
Presented by Alister Wyld
So, what is MatterSphere? Let us try to give you a taste of this powerful and far-reaching product in under an hour. Learn how MatterSphere is a front office tool, a case management system, a document management repository, and a whole lot more. All are welcome, but this is primarily a session aimed at MatterSphere newcomers.
TUESDAY, MAY 24, 2016

7:45 A.M. – 9:15 P.M.

The Greatest Hits of MatterSphere Configurations and Customizations
Presented by Allan Wheatley
In this session, we will present some of the most useful and interesting MatterSphere configurations and customizations that solved unique problems within firms.

MUSIC ROW 2

9:45 A.M. – 10:45 P.M.

How MatterSphere Integrates with 3E, Workspace, and Business Development Premier
Presented by Chris Lamb and David Bradley
Learn how MatterSphere can work with Enterprise and 3E to significantly improve productivity and scale the operations of your firm. Deep insight into how MatterSphere currently integrates with 3E and Workspace will be provided. Learn how the next major release of Workspace will provide lawyers with a consolidated user experience for 3E, MatterSphere, and Business Development Premier.

MUSIC ROW 3

1:45 P.M. – 2:45 P.M.

MatterSphere Document Production
Presented by David Bradley and Allan Wheatley
Learn about the robust document production capabilities that can drive consistency and productivity for your lawyers.

BASS

3:15 P.M. – 4:15 P.M.

MatterSphere Best Practices for Client and Matter Intake
Presented by Alister Wyld and David Bradley
Learn to leverage the power of the MatterSphere document assembly engine. See how the engine can use standardized precedents within Microsoft Word and see them through the whole matter lifecycle through to storage and retrieval from the MatterSphere Document Management System (DMS).

BASS
WORKSPACE AND MOBILE SESSIONS

MONDAY, MAY 23, 2016

11:15 A.M. – 12:15 P.M.
Elite Mobile: Creating the App You Want
Presented by Darren Baldwin and Philip James
Learn how you can display and capture the information that’s important to your lawyers using the Elite Integration Framework (EIF) Designer. In this session, we will show you how easy it is to modify the out-of-the-box mobile app to provide a customized experience for your lawyers.

1:15 P.M. – 2:15 P.M.
Workspace: Under the Hood
Presented by Brad Reaves
This session will go under the hood of Workspace to detail how Workspace, which appears as a simple Web site, is handling the complex things such as data sync, subclassing, merging of entities, and dynamic licensing.

WEDNESDAY, MAY 25, 2016

1:30 P.M. – 2:30 P.M.
Mobile: What Do You Want To Do Today?
Presented by Philip James and Darren Baldwin
Join us for a round table discussion around mobility. What would you like to see out of the box, even though Elite Mobile is configurable?

CUMBERLAND 6
Enterprises Tutorials

Tuesday, May 24, 2016

7:45 A.M. – 9:15 A.M.

Multipayor and Split Billing Best Practices
Presented by Heidi Fedler

What is multipayor billing? What is split billing? What is the difference and the best way to use them? Join us for an exploration of how they work, the benefits, and the impact on statistics and reporting.

LEGENDS B

4:30 P.M. – 6:00 P.M.

Extend in Detail
Presented by Wesley Nix

Join us for this tutorial as we explore Extend. We will provide an overall how-to and discuss setting up standard events and Event Manager. Advanced topics will include taking a SQL statement and turning it into an event, using date offsets to get events to run on specific days, finding the last index number if an event needs to be re-run (credit reports), and excluding fee earners from having data in the report versus excluding fee earners from receiving the report.

ELECTRIC

Understanding Enterprise Framework Tools and Screen Customizations
Presented by Matt Jamma

Join us for an in-depth look at the Enterprise Tools menu functions and how they can be used to enhance and customize the Enterprise experience for your users. This tutorial will focus mainly on the functions that will impact the user interface, including Data Dictionary Manager, Message Manager, Label Preferences, Query Builder, Multi Query Builder, and Tree View Editor. We also will explore the benefits of using Visual Basic for Applications (VBA) to extend the functionality of Enterprise applications by customizing screens to streamline processes as well as to secure data. You will learn how to move certain fields from one screen to another for the firm, group, or individual and how to secure information by either disabling a field or even removing it.

MUSIC ROW 3

Wednesday, May 25, 2016

8:00 A.M. – 10:00 A.M.

Billing Manager Best Practices
Presented by Fran Stribling

Join us as we review the best and most efficient practices for managing the billing process at your firm.

ELECTRIC

Enterprise Flat Fee Billing Best Practices
Presented by Maggie Walker-O’Connor

This tutorial will provide an in-depth review of the setups, use, process flow, and reporting for implementing flat fee billing in Enterprise.

MUSIC ROW 3

10:30 A.M. – 12:30 P.M.

Enterprise Balancing Best Practices
Presented by Fran Stribling

Join us as we review the recommended month-end balancing steps and processes and how these various processes combine for easy month-end balancing. We also will discuss tips, tricks, and troubleshooting for out-of-balance situations.

CUMBERLAND 6

Enterprise Interim Billing Best Practices
Presented by Heidi Fedler

Join us for an extensive look at the Enterprise Interim Billing feature (also known as Fixed Fee or On Account Billing). Interim billing allows your firm to render invoices without relieving work-in-progress. As unallocated credits reduce accounts receivables, interim balances reduce unbilled time and costs. This tutorial will cover everything from setups, to transactions, to the impact on statistics and reporting.

MUSIC ROW 3

Enterprise Billing Data Structures
Presented by Charles Zack

This tutorial will follow basic Enterprise Billing Manager transactions in the database as they move through the system. Learn about the main tables for billing reporting and review some typical queries used in balancing billing data to the GL.

MUSIC ROW 4
**ENTERPRISE SESSIONS**

**MONDAY, MAY 23, 2016**

**10:00 A.M. – 11:00 A.M.**

**Enterprise Proforma Process Integration with Paperless Proforma**
Presented by Matt Klem and Matt Jamma

In this session, we will walk through the proforma process when using Paperless Proforma. We will cover the following topics: how to generate the proformas in Enterprise, an overview of the editing of the proformas in Paperless Proforma, and the upload of the Paperless Proforma changes into Enterprise for billing.

**CUMBERLAND 5**

**Conflicts Manager: Sanction List Integrations Overview**
Presented by Justin Bortnicker and Tina Pyselman

Join us for an overview of how Conflicts Manager integrates with the US Treasury/SDN/Do Not Do Business With/OFAC/OFSI/HMT Sanction Lists. A portion of this session will include covering a services engagement that can automate loading the OFAC files from the US Treasury site.

**ELECTRIC**

**Enterprise Favorite Features**
Presented by Jane Heino, Kevin Threlfall, and Michelle Duran

Join the Elite frontline product subject matter experts to hear some of their favorite features. This is a good session for new customers getting an understanding of Enterprise as well as established customers looking for ways to be more efficient with the system and business processes.

**LEGENDS B**

**Enterprise Basic System Administration Best Practices**
Presented by Charles Zack

This session will review the basic setup of an Enterprise instance, including file structure, server roles, adding users, and printers.

**LEGENDS C**

**11:15 A.M. – 12:15 P.M.**

**Enterprise Progression**
Presented by Elisabet Hardy and Patti Goettel

Join our Product Management Team for a review of the Enterprise Progression, including the highlights of the Enterprise 3.11 release.

**LEGENDS D**

**1:15 P.M. – 2:15 P.M.**

**Billing Rates Best Practices**
Presented by Heidi Fedler

With complex rate demands and exceptions on the rise, this session will help you gain a better understanding of the hierarchy of standard and alternate billing rates and options available to you.

**LEGENDS B**

**Configuring Paperless Proforma for Beginners**
Presented by Matt Klem

In this session, you will learn how to make configuration changes to Paperless Proforma 4.5 that can customize certain aspects of your Paperless Proforma environment. From list view defaults, to back end configuration settings, this session will allow you to tailor your environment to your own needs.

**LEGENDS C**

**2:45 P.M. – 3:45 P.M.**

**Enterprise Write-ups and Write-downs Best Practices**
Presented by Maggie Walker-O’Connor

Join us for an in-depth review of the various write-up and write-down options available in Enterprise. Discover how these transactions flow through the system in terms of realization and postings and learn about their impact on statistics and reporting.

**LEGENDS B**

**Enterprise 3.10 and 3.11 Records Manager Enhancements Review**
Presented by Janis Gaston

In this session, we will review the enhancements delivered in the Enterprise Records Manager 3.10 and 3.11 releases.

**LEGENDS C**
4:00 P.M. – 5:30 P.M.

**Integrating Image Connect with Enterprise and WebView**
*Presented by Ruben Linero*

Image Connect, the Thomson Reuters Elite standalone imaging application, is a .NET Web-based product that enables automatic association of images with transactions. During this session, find out how Image Connect can provide enhanced functionality when integrated with Enterprise and WebView.

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**TUESDAY, MAY 24, 2016**

7:45 A.M. – 9:15 A.M.

**WebView 5.5 and 5.6 Enhancements Review**
*Presented by Skip Wachman*

In this session, we will review the enhancements delivered in the WebView 5.5 and 5.6 releases.

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**Enterprise 3.10 and 3.11 Billing Manager Enhancements Review**
*Presented by Heidi Fedler and Maggie Walker-O’Connor*

In this session, we will review the enhancements delivered in the Enterprise Billing Manager 3.10 and 3.11 releases.

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**Standard Enterprise Reports**
*Presented by Michelle Duran*

In this session, you will discover the advantages of using Enterprise standard reports and get to know some of the most useful reports. Come learn how to add a title, save a query, change numeric formats, and understand advanced sorts—in order to get the data you are looking for the way you want it. Also learn how to store your reports and save them in a queue so you can run them on demand or schedule them.

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**Extend Best Practices and 3.11 Enhancements Review**
*Presented by Matt Jamma*

Join us for an examination of the customization capabilities available with Extend. Learn how to customize standard events to tailor them to your firm’s needs. Leave this session with an understanding of the enhancements included in the 3.11 release. Previous knowledge of Extend is strongly recommended.

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**xcelerate Budgeting and Forecasting**
*Presented by Jag Dhariwal and Ameet Kamat, both of OLAP Vision*

Join us for an introduction to xcelerate Budgeting and Forecasting, the product built for 3E and Enterprise customers. Learn how xcelerate can help your firm protect profits with real-time budget insight and skyrocketing efficiency and accuracy. Come hear about new features, customer case studies, and exciting product roadmap announcements.

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**WEB**

**BASS**

**LEGENDS B**

**IT**

**M**

**LEGENDS C**

**IT**

**M**

**LEGENDS G**

**IT**

**M**

**ELECTRIC**
ENTERPRISE SESSIONS

TUESDAY, MAY 24, 2016

9:45 A.M. – 10:45 A.M.
Enterprise Conflicts Manager 3.10 and 3.11 Enhancements Review
Presented by Janis Gaston
In this session, we will review the enhancements delivered in the Enterprise Conflicts Manager 3.10 and 3.11 releases.

LEGENDS B

Enterprise Volume Discounts
Presented by Maggie Walker-O’Connor
Would you like to start using volume discounts at your firm? Learn the options available to streamline the reporting and application of this feature.

LEGENDS C

11:00 A.M. – 12:00 P.M.
Follow-up Bills and Interest Best Practices
Presented by Heidi Fedler
Do you need to remind clients of their accounts receivable balance? Do you need to give them incentive to pay on a timely basis? Join us as we explore the options available in Enterprise when generating follow-up bills/reminder statements and interest in Billing Manager.

LEGENDS C

WebView Time Entry: Tips and Tricks
Presented by Skip Wachman
In this session, you will discover page design tips and time entry techniques that will enable users to spend less time and effort entering their time. Topics will include timers, suspense time, direct time entry, weekly time entry, copy previous, using timecard templates, frequent matters, and nicknames.

LEGENDS G

1:45 P.M. – 2:45 P.M.
Enterprise Recurring Fees
Presented by Maggie Walker-O’Connor
Does your firm bill a fixed amount at regular intervals for clients? This Enterprise session will look at the setups, options, and process of using recurring fees.

LEGENDS B

Tips and Tricks in Credits
Presented by Heidi Fedler
In this session, we will share tips and tricks in Credits to help maximize your use of the application. Focus will be on those options which may be less known to the Enterprise user.

LEGENDS C

Legal Business Intelligence That Works
Presented by Dan Wales and Rob Stote, both of DW Reporting
With more than 50 international law firms utilizing their solutions successfully, DW Reporting will be showcasing their leading product lines Quantum – Business Intelligence and Evaluate – Matter Pricing and Budgeting. Effective management information is essential to the success of today’s law firm, but organizations are frequently unable to leverage their core business data into tangible goals and metrics. Join this session to see how other Enterprise and 3E clients are embracing DW Reporting’s Microsoft-based business intelligence solutions to enable users to be driven by data and increase performance.

LEGENDS C
3:15 P.M. – 4:15 P.M.

Enterprise Data Warehouse Reporting
Presented by Matt Jamma

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

MUSIC ROW 3

Tips and Tricks in Proforma Edit
Presented by Maggie Walker-O’Connor

In this session, we will show you tips and tricks in Proforma Edit to help maximize your use of the application. Focus will be on those options which may be less known to the Enterprise user.

MUSIC ROW 4

WEDNESDAY, MAY 25, 2016

1:30 P.M. – 2:30 P.M.

Enterprise Data Mining Tips and Tricks
Presented by Matt Jamma

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

MUSIC ROW 3

3:00 P.M. – 4:00 P.M.

Basic Troubleshooting in Enterprise Using SQL
Presented by Charles Zack

This session will cover basic SQL concepts as well as provide some ideas for basic troubleshooting in Enterprise using SQL.

MUSIC ROW 4
# ENTERPRISE TO 3E TUTORIALS

## MONDAY, MAY 23, 2016

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Presenters</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4:00 P.M. – 5:30 P.M.</td>
<td><strong>Complex Billing</strong>&lt;br&gt;Presented by Tina Pyselman and Fran Stribling&lt;br&gt;Join us while we explore how 3E handles complex billing arrangements compared to Enterprise.</td>
<td><strong>ELECTRIC</strong></td>
<td>Learn about the differences in billing processes between Enterprise and 3E.</td>
</tr>
<tr>
<td>7:45 A.M. – 9:15 A.M.</td>
<td><strong>Meeting Your Business Needs Today while Prepping Your Data for 3E</strong>&lt;br&gt;Presented by David Goodrich&lt;br&gt;Are you wondering what you can do today with your Enterprise data that will help you prepare for a successful conversion to 3E? In this tutorial, we will focus on the elements required for a successful data conversion to 3E while keeping an eye on current operations in Enterprise. Learn about data integrity processes, tips and techniques on data clean-up, and best practices that prepare your data for migration.</td>
<td><strong>LEGENDS A</strong></td>
<td>Explore the requirements for successful data conversion and preparation for 3E.</td>
</tr>
<tr>
<td>9:45 A.M. – 10:45 A.M.</td>
<td><strong>Compare and Contrast: Multicurrency Part 1</strong>&lt;br&gt;Presented by Bill Motter and Lisa Brown&lt;br&gt;With the unique 3E multicurrency framework, currency conversion and multicurrency reporting are built in. Features like explicit currency date tracking, robust Realized/Unrealized FX, and unlimited currency rate types allow for superior currency tracking and reporting over Enterprise standard multicurrency or EGR functionality. This session will explore the ease in which 3E handles multicurrency from sub-ledgers to GL.</td>
<td><strong>LEGENDS E</strong></td>
<td>Understand the differences in multicurrency management between 3E and Enterprise.</td>
</tr>
<tr>
<td>11:00 A.M. – 12:00 P.M.</td>
<td><strong>Compare and Contrast: Multicurrency Part 2</strong>&lt;br&gt;Presented by Bill Motter and Lisa Brown&lt;br&gt;With the unique 3E multicurrency framework, currency conversion and multicurrency reporting are built in. Features like explicit currency date tracking, robust Realized/Unrealized FX, and unlimited currency rate types allow for superior currency tracking and reporting over Enterprise standard multicurrency or EGR functionality. This session will explore the ease in which 3E handles multicurrency from sub-ledgers to GL.</td>
<td><strong>LEGENDS E</strong></td>
<td>Extend the discussion on multicurrency management to further explore complexities.</td>
</tr>
<tr>
<td>4:30 P.M. – 6:00 P.M.</td>
<td><strong>Compare and Contrast: Billing</strong>&lt;br&gt;Presented by Mary McCarthy and Marti Attanasio&lt;br&gt;Join us as we discuss the billing similarities and differences between Enterprise and 3E.</td>
<td><strong>LEGENDS E</strong></td>
<td>Compare and contrast the billing processes in Enterprise and 3E.</td>
</tr>
</tbody>
</table>

## TUESDAY, MAY 24, 2016

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<td>4:00 P.M. – 5:30 P.M.</td>
<td><strong>Compare and Contrast: AP and GL</strong>&lt;br&gt;Presented by Bill Motter and Nancy Agpaoa&lt;br&gt;Join us as we discuss the AP and GL similarities and differences between Enterprise and 3E.</td>
<td><strong>ELECTRIC</strong></td>
<td>Compare the AP and GL functionalities in Enterprise and 3E.</td>
</tr>
<tr>
<td>7:45 A.M. – 9:15 A.M.</td>
<td><strong>Compare and Contrast: Multicurrency Part 1</strong>&lt;br&gt;Presented by Bill Motter and Lisa Brown&lt;br&gt;With the unique 3E multicurrency framework, currency conversion and multicurrency reporting are built in. Features like explicit currency date tracking, robust Realized/Unrealized FX, and unlimited currency rate types allow for superior currency tracking and reporting over Enterprise standard multicurrency or EGR functionality. This session will explore the ease in which 3E handles multicurrency from sub-ledgers to GL.</td>
<td><strong>LEGENDS E</strong></td>
<td>Extend the discussion on multicurrency management.</td>
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<td>9:45 A.M. – 10:45 A.M.</td>
<td><strong>Compare and Contrast: Multicurrency Part 2</strong>&lt;br&gt;Presented by Bill Motter and Lisa Brown&lt;br&gt;With the unique 3E multicurrency framework, currency conversion and multicurrency reporting are built in. Features like explicit currency date tracking, robust Realized/Unrealized FX, and unlimited currency rate types allow for superior currency tracking and reporting over Enterprise standard multicurrency or EGR functionality. This session will explore the ease in which 3E handles multicurrency from sub-ledgers to GL.</td>
<td><strong>LEGENDS E</strong></td>
<td>Detailed exploration of multicurrency management in 3E compared to Enterprise.</td>
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<td>11:00 A.M. – 12:00 P.M.</td>
<td><strong>Compare and Contrast: Billing</strong>&lt;br&gt;Presented by Mary McCarthy and Marti Attanasio&lt;br&gt;Join us as we discuss the billing similarities and differences between Enterprise and 3E.</td>
<td><strong>LEGENDS E</strong></td>
<td>Compare billing processes in Enterprise and 3E.</td>
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<td><strong>LEGENDS E</strong></td>
<td>In-depth analysis of billing differences between 3E and Enterprise.</td>
</tr>
</tbody>
</table>
WEDNESDAY, MAY 25, 2016

8:00 A.M. – 10:00 A.M.

Compare and Contrast: Data Structures and Framework
Presented by Lino Barilaro
Join us as we discuss the similarity of Enterprise data structures as compared to 3E. This tutorial will help you understand the 3E data structure set and how it differs from Enterprise.

Enterprise to 3E: A Strategy Blueprint
Presented by Avneet Sahni, David Goodrich, Donna Kendall, and Bruce Rosen
Are you wondering how to start developing a strategy to move to 3E? This tutorial will help you begin to develop a vision by identifying your business needs that drive 3E value. What are your current pain points? What are your critical business processes? What is your success criteria? This tutorial will take attendees through a combined technical and application session, including a review of a checklist on what can be done today to prepare for your 3E implementation while delivering value in Enterprise.

10:30 A.M. – 12:30 P.M.

Compare and Contrast: Setups
Presented by Donna Kendall and Mary McCarthy
Join us as we discuss the setup similarities and differences between Enterprise and 3E.

1:30 P.M. – 2:30 P.M.

Compare and Contrast: Conflicts and Records
Presented by Janis Gaston and Mark Benz
Join us as we discuss the similarities and differences between Enterprise Conflicts and Records as compared to 3E.

SCHEDULE A PRIVATE DEMO!
Get a closer look at the Thomson Reuters Elite product line with a personal demonstration in our private demo suites. Visit the Demo Suite check-in desk located on the 3rd floor, near the Mockingbird rooms.

Thomson Reuters Elite Demo Suite hours
- Monday 10:00 A.M. – 5:00 P.M.
- Tuesday 8:00 A.M. – 5:00 P.M.
- Wednesday 8:00 A.M. – 4:00 P.M.
MONDAY, MAY 23, 2016

10:00 A.M. – 11:00 A.M.

3E Roadmap
Presented by the 3E Product Management Team
Join our 3E Product Management Team as they review the upcoming feature development for 3E.

11:15 A.M. – 12:15 P.M.

Migrating from Enterprise to 3E: The Impact on E-billing
Presented by Kasey Kellum
When taking on a project like transitioning from Enterprise to 3E, it can be easy to overlook the potential impact on your e-billing process. Join us as we discuss what the process entails from the eBillingHub perspective and hear testimonials from customers who have already completed the migration.

1:15 P.M. – 2:15 P.M.

What Are the Business Benefits of Moving to 3E?
Presented by Betsy Esquivel and Martine Tharp
Join our experienced team as they lay out the business benefits and transformative aspects of 3E.

2:45 P.M. – 3:45 P.M.

Preparing for a 3E Implementation: A Post Mortem Case Study
Presented by Mark Peterson, Reed Smith
This session will focus on the lifecycle of a 3E implementation of a firm that has completed their implementation from Enterprise to 3E. Hear how they prepared for this project—from project planning, to organizing teams to developing a stakeholder strategy that facilitated firm buy-in from development to execution. This session will provide great insight from a completed 3E project, including what worked and what didn’t work, along with areas to closely monitor.

Compare and Contrast: Understanding the 3E Product Systems Requirements
Presented by Bruce Rosen and Scott Strachan
Join us for a stem-to-stem review of the 3E Product System Requirements (PSR) as well as a compare and contrast to Enterprise.
TUESDAY, MAY 24, 2016

7:45 AM – 9:15 AM.
Identifying and Managing Your Existing Enterprise Customizations
Presented by Val Brady and Charles Zack
When replacing a core business system, you need to know what your current customizations are—and what business benefit they provide—to ensure those requirements continue to be met. This session will assist you in identifying your current customizations such as integrations, reports, information distribution, or similar and how to get a handle on their requirements in the new system.

9:45 AM – 10:45 AM.
Dollars and Sense: Your 3E Business Plan
Presented by Brent Bourque and Lucas Carlepp
Are you wondering where to start with your 3E business plan and how to sell it internally? Learn from Elite account executives what has worked for other clients on their path to 3E.

11:00 AM – 12:00 PM.
Why 3E? Making the Decision to Move to 3E
Presented by Brigitte Miklaszewski and Carol Blundy
What were the decisions that led other firms to move to 3E? Hear the reasons, what decision-making process they followed to get there, and what benefits they have experienced since their move to 3E.

Keys to a Successful 3E Conversion
Presented by Sandra H. Reed and Jane Threlkeld, both of Source Consulting Group LLC
Source Consulting Group LLC has assisted a multitude of firms with their 3E conversion and has found that there are some key factors to ensuring that your 3E conversion is successful. In this session, we will talk about the key considerations for firms migrating to 3E, including preparation data clean-up within the legacy system, approaches to planning for the data conversion with your Elite conversion team, and best practice methodology for data validation once the data is converted. We also will focus on the importance of accurate data maps with recommendations on how to read those by non-programmers.

3:15 PM – 4:15 PM.
Enterprise Conflicts to 3E Conflicts from the User Perspective
Presented by Virginia Gleason, Jerid Dupier, and Cynthia Bagnell, Baker Hostetler
Join this discussion to learn from a client that has moved from enterprise to 3E Conflicts and understand how they prepared their database, data, and related party links for conversion and 3E reporting. Lessons learned will be shared along with tips on 3E usage for information to be entered on the entity to assist with future review and ensure a good intake process.

Learn from Your Peers: Anatomy of an Enterprise to 3E Conversion
Presented by Kathy Hall, Thompson & Knight LLP and Terrie Raymond, Tara Enterprises
Interested in hearing about an Enterprise to 3E conversion from a customer who has recently gone live on 3E? Join us for a review of the process they followed, the challenges they experienced, and the efficiencies they gained.
ENTERPRISE TO 3E SESSIONS

TUESDAY, MAY 24, 2016

4:30 P.M. – 6:00 P.M.

3E Implementation: Implementation Methodology
Presented by Cindy Young and Kim Vickerman
This session will cover the current 3E implementation methodology and project quality model. If your firm is preparing to implement 3E, or is in the process of doing so, join us as we review project phases, key events, and project management philosophies used to implement 3E.

Why Did Elite Write 3E?
Presented by Patti Goettel and Betsy Esquivel
In this session, we will review the reasons why Elite developed 3E, what were our goals, our methodology, and the resulting benefits.

WEDNESDAY, MAY 25, 2016

3:00 P.M. – 4:00 P.M.

Implementing 3E Faster and More Efficiently
Presented by Daniel Martinez, Val Brady, and Carol Blundy
Join us to learn what we are doing in 3E and in the way we implement it to make it more time effective and less costly, for example, using the component library. We also will discuss how to make 2.7.4 sing with the integrated standards.

MUSIC ROW 2
AMP UP PROFITS WITH BOLD NEW INSIGHTS.

FINANCIAL MANAGEMENT THAT DELIVERS BUSINESS INTELLIGENCE.

Gain insights you never had before to run more profitably than ever before. Only Thomson Reuters Elite™ offers near-real-time access to the most advanced KPIs, analytics, and benchmarks to help you make strategic business decisions. You boost efficiency by having all your operational data in one view. You improve cash flow with advanced features that streamline proforma management and billing. And you learn where and how you can enhance financial performance throughout the firm. Energizing your path to greater profitability.

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See a mobile interactive preview; scan code with your smartphone.

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3E TUTORIALS

MONDAY, MAY 23, 2016

4:00 P.M. – 5:30 P.M.

3E Workflows You Can’t Live Without
Presented by Gerry Lattimer and Scott Strachan
Tired of not knowing where your check approval is? Fret no more. New standard workflows in 3E can eliminate that hassle. This session will demonstrate how easy it is to build 3E workflows and clone standard workflows from within the 3E user interface.

CUMBERLAND 6

All You Need to Close Your 3E Month
Presented by Karen Jakes and Mary McCarthy
In this session, we will discuss the firm balancing process, detailing the reports and tools that can be used. We will also cover tips and tricks for existing clients to improve or change their balancing process and the considerations that need to be given to make full use of the new tools available.

LEGENDS

TUESDAY, MAY 24, 2016

7:45 A.M. – 9:15 A.M.

What’s New in 3E Billing
Presented by Janis Gaston
Join us as we discuss what’s new in 3E 2.7.4. We will discuss new features, including allowing multiple PTAs per timecard, multiple adjustments per proforma, regenerating credit notes, generating proformas with doubtful AR and no WIP, and more.

MUSIC ROW 4

4:30 P.M. – 6:00 P.M.

Building a Custom Portal in 3E
Presented by Avneet Sahni and Sandeep Gupta
Custom portals are the hot new customization trend for showing user’s their relevant tasks. Come see a custom portal and learn how to build these portals to present your data in a manageable way.

LEGENDS

Entity, Client and Matter Maintenance for Intake, Conflicts, and Records Users
Presented by Randolph Nairn and Mark Benz
Join us in this training tutorial to learn about the 3E entity concept as well as client and matter maintenance during the new business intake process and beyond. Understand how the entity allows firms to adhere to best practices for managing firm clients, contacts, vendors, payees, employees, and related parties in one place. This tutorial is geared toward intake, conflicts, and records users, but is open to all attendees.

MUSIC ROW 3
WEDNESDAY, MAY 25, 2016

8:00 A.M. – 10:00 A.M.

3E Records Configurations
Presented by Mike Wright
Learn how to set up and configure 3E Records so it works best based on your firm’s procedures. Understand how the application can help you be more efficient by matching individual users’ actual job functions. Learn how to tailor usage based on system, firm, office, role, and user options.

LEGENDS D

3E Billing Rates
Presented by Kerry Vandermolen and Ruben Linero
Rates in 3E Invoice Management have been designed to be extremely flexible, easy to update, and configurable by multiple dimensions. In this session, we will show some real-world examples of how to set up exception rates for your clients.

LEGENDS F

Improving the 3E Balancing Experience
Presented by Lisa Brown and Bill Motter
Since 2.7.2, we’ve been adding new balancing functionality that helps you streamline your month-end balancing. Experience efficiencies with the new At-a-Glance dashboard views that quickly indicate the presence of any balancing issues. With the new integrated drill downs, the At-a-Glance dashboards make it easy to pinpoint discrepancies so firms can resolve issues promptly.

MUSIC ROW 4

10:30 A.M. – 12:30 P.M.

The Power of 3E Masking
Presented by Karen Jakes and Kerry Vandermolen
Discover the power of 3E Masking. 3E has the ability to post differing GL entries to multiple sets of books (GL Types) for a single transaction. This concept supports GL postings for various statutory requirements as well as differing firm requirements.

LEGENDS F
MONDAY, MAY 23, 2016

10:00 A.M. – 11:00 A.M.

3E Roadmap
Presented by the 3E Product Management Team
Join our 3E Product Management Team as they review the upcoming feature development for 3E.

11:15 A.M. – 12:15 P.M.

Introducing 3E Studio: Visual Studio for 3E
Presented by Harun Diri
This session will provide an overview of the new features of 3E Studio and how to use it to develop 3E applications. It also will include a discussion on system requirements to install and use the new tool.

2:45 P.M. – 3:45 P.M.

Getting Ahead and Uncovering Strategic Benefits Before a System Conversion or Migration Begins
Presented by Shishir Shetty, Rob Beisswenger, and Russ Haskin, all of Wilson Legal Solutions
It only makes sense that when a firm goes through a practice management conversion or migration their first goal is to make sure they can produce the same results that they had with previous versions. However, many clients realize after the fact that there were inherent opportunities to improve and align processes, advance deliverables, and strategically use the conversion as a way of betterment for the firm. Wilson Legal Solutions and its team is well versed in working with firms to identify opportunities for improvement while establishing a solid plan to bring the firm through a conversion or migration with as much benefit as possible. This informative session will feature experts at Wilson Legal as they lead an interactive discussion on how best to position your firm when taking on these engagements. Discover practical tips on how to avoid the pitfalls that can lengthen many of these engagements while discovering the additional benefits. Join in a real world case study illustrating the need for proactive planning well before an engagement starts.
Making Big Changes Easy: 3E Billing Utilities
Presented by Marti Attanasio and Mary McCarthy
Have you ever been notified that a fee earner is now in a new department, and then discovered that they moved into that department three weeks ago? Have you ever wondered how to back-date the change and re-post all of the affected timecards that have been reported in the wrong department for three weeks? Have you ever wondered if 3E can find and delete all duplicate timecards in the system? Have you ever wondered how 3E controls the closing of large numbers of matters, filtering out those with certain balances? Join us to find out!

Securing 3E: Process and Data Level Security
Presented by Gerry Lattimer, Ruby Lee, and Avneet Sahni
Join us to learn how to combine process-level security and dashboard design to ensure that the 3E user experience is the best it can be, while still under easily managed security control to meet the needs of your firm. We will share best practices and tips, as well as discuss our new persona-based dashboards and our recommended role-based security, so that your firm can ensure that what you see is what you get.

3E Conflicts: Recent Developments and What’s to Come
Presented by Tina Pyselman
Join this session to learn about the enhancements delivered in our latest release and what’s planned for our next release.

The AP Purchase to Pay Cycle
Presented by La Vonne Maliga and Maria Gray
Do you need to streamline and control your expenditure approval process? Purchase to Pay follows the lifecycle of firm expenditures from requisition and purchase order to voucher posting and payment. Learn how the various purchase order matching options and the new standard check request workflows can assist firms in streamlining your purchasing process.

3E Reporting for Risk Professionals
Presented by Virginia Gleason, Jerid Dupier, and Cynthia Bagnell, Baker Hostetler
This session will provide an overview of 3E metrics and standard reports and inquiries, including metrics and reports useful for risk management.

Introducing 3E Financial Reporting 2.0
Presented by Lisa Brown and Wesley Nix
This major release of 3E Financial Reporting 2.0 takes the report building experience to the next level. Join us for a demo of the new functionality and witness the enhanced user experience and the new reporting options. This session also will explore what’s coming in the next releases of 3E Financial Reporting.

Duplicates Be Gone! 3E Entity Merge
Presented by Mark Benz
Join us as we discuss the dos, don’ts, and the whys behind the new entity merge functionality. Discover how to streamline your entity data by consolidation and elimination of duplicates resulting from mergers and everyday usage.
3E SESSIONS

TUESDAY, MAY 24, 2016

7:45 A.M. – 9:15 A.M.

xcelerate Budgeting and Forecasting
Presented by Jag Dhariwal and Ameet Kamat, both of OLAP Vision
Join us for an introduction to xcelerate Budgeting and Forecasting, the product built for 3E and Enterprise customers. Learn how xcelerate can help your firm protect profits with real-time budget insight and skyrocketing efficiency and accuracy. Come hear about new features, customer case studies, and exciting product roadmap announcements.

9:45 A.M. – 10:45 A.M.

Elite and the Cloud
Presented by Ruby Lee and Paul Odette
During this session, we will share where and how cloud computing fits into legal. We will highlight current Elite product explorations in the Cloud.

What’s New in AP, GL, and Trust
Presented by Marti Attanasio and Maria Gray
Learn about the exciting features recently delivered in 2.7.3 and 2.7.4 for AP, GL, and Trust. New utilities and enhanced features bring more functionality and compliance to recent 3E releases. 3E 2.7.3 and 2.7.4 deliver the ability to merge or renumber GL accounts, rebuild GL summary tables, track multiple firm cash or accrual postings to firm books, submit a positive pay file for your trust accounts, and much more.

Make Billing Rules and Notifications Your Own
Presented by Mark Burt, GableGotwals
Are you in the dark when it comes to understanding that your client billing requirements are not being met? Learn how billing rules and 3E Notifications can provide real-time, actionable information to eliminate manual auditing after the fact. Discover the efficiency gain billing rules can provide by interactively notifying a fee earner or biller that their actions violate client billing requirements. These hidden 3E gems are easy to configure and provide controls to keep your staff in the know.

What’s New with 3E Framework, 3E Workflow, and the Elite Services Bus
Presented by Gerry Lattimer
This session will provide an overview of the new 3E platform and Elite Services Bus features in recent releases. We also will dive into new standard workflows provided in the latest release.

11:00 A.M. – 12:00 P.M.

Managing Electronic Records
Presented by Mike Wright
Join us as we discuss 3E Records’ electronic records management capabilities, including document management system integration, bulk file loading, and Outlook integration.

New Features for 3E Split Billing
Presented by Janis Gaston
This session will provide a detailed look at the enhancements to the split billing features. We also will provide a brief introductory overview on the basics.

3E Performance Update
Presented by Mark Gendein and Ruby Lee
Join us as we share recent changes and R&D improvements that impact 3E performance.

Persona-based Dashboard Presentations
Presented by Randolph Nairn
This session will demonstrate the different dashboards specifically created for different personas, or types of users or roles, within your firm. Learn how they have been set up to provide the information and data that is relevant to specific job functions and how they can be implemented quickly and easily to speed your implementation. Simple dashboard customization also will be covered.
The Elite Data Warehouse and Future Reporting and Business Intelligence Strategy
Presented by Marc Solomon and Alan Flower
Join us as we introduce the new Elite Data Warehouse and learn how easy it is to report on data from your various Elite solutions. We will showcase our business intelligence strategy to connect more within Thomson Reuters Elite and your firm.

Discover the Elite Services Bus: Aka BizTalk
Presented by Stan Harder
This session will introduce you to the Elite Services Bus and BizTalk and their usage and benefits with 3E. We will explore how the transaction services work, how you find your servers, and what is in the config files on the servers.

Introducing Monitoring and Diagnostics
Presented by Ruby Lee and Mark Gendein
During this session, we will introduce you to our new Monitoring and Diagnostics solution. We will demonstrate how this tool will enable you to better understand your 3E system and how it will help Elite to better support you.

Unleash the Power of The 3E General Ledger
Presented by Karen Jakes
Discover how GL types, GL books, and reporting units can be leveraged to meet the varying GL reporting requirements firms have today. Couple that with the power of transaction type masking to explore the unlimited capabilities of meeting firm and local reporting needs. Also learn about GL cross validation rules, one of the few hidden gems of 3E GL.

Our Favorite 3E Features
Presented by Philip Underwood
Join the Elite frontline product subject matter experts to hear some of their favorite features. This is a good session for new customers getting an understanding of 3E as well as established customers looking for ways to be more efficient with the system and business processes.

What Is the Elite Conversion Engine?
Presented by David Goodrich and Val Brady
The Elite Conversion Engine (ECE) is the tool that conversion analysts use that accelerates conversion timelines and improves data quality. This technical overview will help you understand how it’s used.

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3E SESSIONS

WEDNESDAY, MAY 25, 2016

1:30 P.M. – 2:30 P.M.

Sneak Peek: Paperless Proforma for 3E
Presented by Karen Altnow and Jason Taylor
Paperless proformas for 3E! Catch a glimpse of an exciting new product coming your way.

What Is the Express Services Package (ESP) Methodology?
Presented by Daniel Martinez, Carol Blundy, and Val Brady
The Express Services Package is a new implementation process that reduces implementation timelines by providing pre-developed tools and methods that are prescriptive in their approach. Smaller to mid-sized firms benefit with a lower cost implementation that has been developed specifically for their needs. In this session, we will discuss the method in general, successes, opportunities, and the path forward.

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

3E Metrics, Reports, and Presentations
Presented by Stan Harder
What is a metric, what is a report, and how do they work together? Why is there no data displayed in the metric results (no down dimensions defined)? How do I find a previous run? If a report is customized and saved to favorites, how do we push this out to everyone? Join us as we discuss the answers to these questions.

Financial Reporting Round Table
Presented by Lisa Brown, Marc Solomon, and Jerid Dupier
Join this client round table discussion to talk with peers and Thomson Reuters Elite experts about best practices, uses, and needs for 3E Financial Reporting.

Implementing 3E Faster and More Efficiently
Presented by Daniel Martinez, Val Brady, and Carol Blundy
Join us to learn what we are doing in 3E and in the way we implement it to make it more time effective and less costly, for example, using the component library. We also will discuss how to make 2.7.4 sing with the integrated standards.

What Is OQL and How You Can Improve Your Use of It
Presented by Niles Ritter
Revisit helpful tips on tuning your OQL and learn new features that will help you locate the exact information you are after.

Records Management Round Table
Presented by Virginia Gleason and Jerid Dupier
Bring your topics, ideas, advice, and questions about records management in general and 3E Records in particular to this round table discussion with peers and Thomson Reuters Elite product managers.
Managing Your Lawyer: Self-service with 3E  
**Presented by La Vonne Maliga and Allan Wheatley**  
This session will demonstrate the various self-service options 3E and MatterSphere provide for 3E users whether secretaries, administrative assistants, paralegals, or other administrative staff supporting the lawyers in your firm. It includes functions such as new client/matter intake, updating contacts, payment and purchase requests, trust check requests, time entry, records file requests, and basic 3E reporting, as well as MatterSphere functions for generating documents, reviewing and managing the lawyer’s diary, and additional functions.

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**3E Conflicts Tips and Tricks**  
**Presented by Mike Wright**  
Achieve better results in less time. This session will provide some suggestions for more effective Conflicts searches and will focus on filters, setups, and best practices.

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**3E FX Revaluation**  
**Presented by Bill Motter and Donna Kendall**  
Join us for a detailed review of the FX revaluation process and the calculations behind the revaluation values.

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**Best Practices in 3E Customizations**  
**Presented by Sandeep Gupta and Avneet Sahni**  
Discuss best practices approaches to customizations, including coding standards. Leverage the best practice standard techniques for customizations and make it easier to obtain the needed support from the onset. We will share our discoveries on development patterns that have worked well, along with lessons learned.

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**LEARNING ZONE**

Stop by the Learning Zone for one-on-one instruction from subject matter experts for your Thomson Reuters solutions.

The Learning Zone is located in the Broadway Prefunction area and open during the following hours:

- **Monday**
  - 9:30 A.M. – 4:30 P.M.
- **Tuesday**
  - 8:00 A.M. – 5:00 P.M.
- **Wednesday**
  - 8:00 A.M. – 3:00 P.M.

PLEASE NOTE: The Learning Zone is closed during the Keynote, General Session Panel, and lunches.
TUESDAY, MAY 24, 2016

7:45 A.M. – 9:15 A.M.

ProLaw Support Round Table
Presented by Rick Roy, Gina Lague, and Julian Cortez
Meet your Support Management Team and participate in a lively discussion regarding entering support incidents and when to contact your Support Team.

3:15 P.M. – 4:15 P.M.

My Favorite ProLaw Features
Presented by Maurice Williams
Join us as ProLaw Product Manager Maurice Williams shares his favorite ProLaw features, including dashboard enhancements, report shortcuts, and audit trails.

4:30 P.M. – 6:00 P.M.

Best Practices for Administering ProLaw
Presented by Lenora Neu
Get the most out of your investment by learning how to maximize administrative functions in ProLaw. In this tutorial, we will review administrative best practices, utilizing resources, and how to use a checklist to manage the administrative process.
WEDNESDAY, MAY 25, 2016

8:00 A.M. – 10:00 A.M.

Train the Trainer: ProLaw New Hire and Continuing Education
Presented by Sharon Winston and Ginny Sutherland

How is your firm handling ProLaw continuing education? A train-the-trainer model can build a pool of competent instructors who can teach ProLaw to others. This model can help ensure that employees get timely training to complete tasks according to company policies and procedures.

Reveal the Anomalies of ProLaw Querying
Presented by Lisa Vedrani

Gain a clear perspective on the logic behind query functionality to help you get the most from your ProLaw data. Feel free to bring queries for a lively group discussion. This tutorial will focus on front office the first hour and back office the second hour.

10:30 A.M. – 12:30 P.M.

Finding Data from the ProLaw Database Using SQL Language
Presented by Austin Gabaldon

In this session, we will show you how to navigate the ProLaw database for the most requested types of data extraction. We will explore how the database tables link together and where each module holds its specific data and how that relates back to the individual contacts, matters, transactions, and journals. This tutorial is highly technical and will require knowledge of SQL to make the most out of it.

WIP Costs in ProLaw and Month-end Balancing
Presented by Gina Lague

Are you using accrual accounting? Do you have trouble tying the numbers in your WIP aging reports to the corresponding general ledger accounts? Come see tips and tricks on what to look for when your numbers do not match. This tutorial will cover both cash and accrual mode.

Intermediate ProLaw .NET Report Design
Presented by Shaunna Johnson

Get an in-depth look at customizing ProLaw .NET reports using the SSRS report builder. Topics will include parameters, expressions, and intermediate custom formatting.

How To Create and Assemble ProLaw Document Templates
Presented by Christa Shannon

Join us as we discuss the document production process from start to finish. You will learn how to analyze internal document workflows to determine document production needs and enable consistency with firm documents. You will then follow along as the instructor creates ProLaw document types from existing templates and from scratch using Adobe and Word.

Dynamic Importing Features
Presented by Christa Shannon

Learn the dos and don’ts of importing Quickview, bank reconciliation, documents, contacts, time entry, and files into ProLaw.
PROLAW SESSIONS

MONDAY, MAY 23, 2016

10:00 A.M. – 11:00 A.M.

What’s New: ProLaw 2016.2
Presented by Ken Bassham
Join us as we highlight the new features in our upcoming version of ProLaw.

ProLaw Canadian Round Table
Presented by Gina Lague, Shaunna Johnson, and Lisa Piccuta
Canadian subject matter experts will be available to facilitate this client discussion on challenges unique to the Canadian Law Society.

ProLaw Performance in a Virtual Environment
Presented by Derwin Cupp
Discover key points to consider in using this dynamic environment for your firm.

New Back Office Functionality in ProLaw
Presented by Courtney Markham
Learn about new ProLaw back office features, including vendor invoicing, pre-bill edits from the dashboard, emailing statements, client level cash receipts, and eBillingHub integration.

ProLaw Front Office Round Table
Presented by Dianne Flynn, Ginny Sutherland, and Christa Shannon
Join us for this information exchange regarding front office topics. ProLaw subject matter experts and clients will be available to answer questions and share information.

11:15 A.M. – 12:15 P.M.

Top Three Consulting Service Requests That You Too Can Do
Presented by Austin Gabaldon
Join us as we discuss the three most requested consulting service requests we receive from clients – cost recover import, basic e-billing setup, and minor SSRS report changes. Learn how each of these can be started (or even completed) by the client, reducing the needed hours with the services team and lowering your costs.

ProLaw on the Go
Presented by Sid Solano
Learn more about the new ProLaw Portal and Mobile App so that you can access ProLaw while away from the office.

ProLaw Government and Corporate Round Table
Presented by Dianne Flynn, Ginny Sutherland, and Lenora Neu
Government and corporate clients can engage in an information exchange with peers. A ProLaw subject matter expert will be on hand to answer questions and facilitate information sharing.

What Help Is Available with Your Support Contract?
Presented by Rick Roy
Discover what assistance your ProLaw Support Teams can offer your organization.
1:15 P.M. – 2:15 P.M.

ProLaw Technical Round Table
Presented by Scott Arnold, Derwin Cupp, Austin Gabaldon, and Sid Solano
Join us for one of the most highly rated sessions during past conferences. This is an information exchange regarding technical topics where ProLaw subject matter experts and other clients will be available to answer questions and facilitate information sharing.

4:00 P.M. – 5:30 P.M.

ProLaw in the Cloud: Things to Consider
Presented by Scott Arnold
This panel session will cover strategy and technical issues with running ProLaw within a third party hosted environment. Participating in this discussion will be a representative from the following hosting partners: Advanced Legal, LevelCloud, ProCirrus Technologies, Uptime Legal, and WAMS, Inc.

2:45 P.M. – 3:45 P.M.

Introduction to ProLaw .NET Report Design
Presented by Lisa Piccuta
Learn the basics of using and designing ProLaw .NET reports using the SSRS report builder.

2:45 P.M. – 3:45 P.M.

ProLaw Back Office Round Table
Presented by Gina Lague, Lenora Neu, and Lisa Piccuta
Join us for this information exchange regarding back office topics. Back office subject matter experts will be available to facilitate this client discussion on using ProLaw back office features.

2:45 P.M. – 3:45 P.M.

Control Data Quality: Managing Your ProLaw Contacts
Presented by Lenora Neu
This session will cover strategies for taking contacts to the next level to help manage your relationships. This includes best practices for maintaining the data quality of your contacts database, using contacts for marketing and CRM functions, and implementation considerations specifically for contacts.

2:45 P.M. – 3:45 P.M.

Managing the E-bill Process Using ProLaw
Presented by Lisa Piccuta and Greg Nilsen
Your firm may be required by one or more of your clients to submit their bills in an electronic data format by uploading them to a specific Web site. Electronic billing is gaining ground as a major billing method. This session will review how to properly set up e-bills in ProLaw. We also will show the validation between ProLaw and eBillingHub.

2:45 P.M. – 3:45 P.M.

ProLaw User Groups and More
Presented by Gary Columb, Shawn Scott, Valencia Saffold from Santa Clara County Counsel, and Sandra Haislet from Warner Angle Hallam Jackson & Formanek, PLC
Learn how you and your firm can benefit from participation in a ProLaw user group. Hear from actual clients about their experiences and learn about the many user groups around the nation, how to join, or how to get one started, and what we can do to help.

2:45 P.M. – 3:45 P.M.

Security Classes: From Full Access to Read-only
Presented by Randall Miles
Is it time to review your security classes? Are you in the dark about setting up ethical walls? This session will delve into best practices regarding both of these topics.
PROLAW SESSIONS

TUESDAY, MAY 24, 2016

9:45 A.M. – 10:45 A.M.

Gain Efficiencies Using the Events Module
Presented by Dianne Flynn

Learn how attorneys, paralegals, and support staff can become efficient using the Events module. Tools include searching multiple matters and contacts; the documents search, including full text searching; the Document Worklist; transferring events; copying and checking out documents; emailing multiple documents; and more.

Change Management
Presented by Brian Clay

Back by popular demand. Change is inevitable and can be difficult. Learn what drives change and what you can do to help ease changes in your firm.

ProLaw Groupware Integration for Exchange Options and Best Practices
Presented by Derwin Cupp

Join us as we discuss requirements and limitations as well as best practices for the whole process from pre-planning to testing and maintenance. We also will review the Agent interface, discussing various settings and their effect on the system.

11:00 A.M. – 12:00 P.M.

Analysis and Tuning of Your MSSQL Database
Presented by Austin Gabaldon

In this session, we will use MSSQL to show you different ways of optimizing and improving the overall health of your database.

ProLaw Reports: Troubleshooting and Maintenance
Presented by Shaunna Johnson

This session is designed to assist in common troubleshooting scenarios and report maintenance using SSRS. We will delve into such problems as report loss, common error messages, and unintentional blank pages on reports.

Using ProLaw for Your Firm’s Marketing
Presented by Lisa Piccuta

Discover how to take advantage of customization in ProLaw to help with your organization’s marketing. Learn how to use contacts and matters to track the marketing efforts in your firm and share best practice tips and tricks.

ARCS2G: Implementing and Managing Financial Strategies
Presented by Joe Zoghbi, MiniSoft, Inc.

Discover how you can efficiently and effectively implement strategic account management solutions.
1:45 P.M. – 2:45 P.M.

**ProLaw Support: Basic Troubleshooting**
*Presented by Julian Cortez and Lisa Vedrani*

This session will cover the top 10 basic troubleshooting steps before calling ProLaw Support.

**Technical Administration of .NET Pro Filing and Mobile**
*Presented by Derwin Cupp*

Join us to better understand the technical setup behind the ProLaw .NET pro filing and mobility integrations and learn about some common issues that arise.

**Billing and Collection Efforts Using Front Office Features**
*Presented by Ginny Sutherland*

Learn how docketing, documents, and notes can assist your firm in collection efforts and help ensure proper and on-time billing in your first pass.

3:15 P.M. – 4:15 P.M.

**Making a Business Process Review Enhance Your Workflow**
*Presented by Sharon Winston*

Is your firm using ProLaw to its full potential? See how a Business Process Review can enhance your firm’s workflow and internal processes.

**ProLaw Agent: Let It Work for You**
*Presented by Lisa Vedrani*

In this session, you will learn about the ProLaw Agent, what’s needed to set it up, and how you can make it work for you. From running your pre-bills to ensuring your documents are indexed, learn how to make the Agent work for you!

4:30 P.M. – 6:00 P.M.

**Custom Tab Setup in ProLaw**
*Presented by Dianne Flynn*

In this session, we will review how to analyze existing database structure, forms, and document templates to design custom tabs that properly store data, are easily searchable, and facilitate document production. We also will discuss custom tab redesign to help you manage your firm’s ongoing custom tab needs.

**Best Practices for ProLaw Conflicts Checking**
*Presented by Ginny Sutherland*

The key to managing conflicts of interest is to develop and use a good conflicts checking system. This session will offer ideas, tips, and best practices to help you fine-tune ProLaw to meet your conflicts checking needs.
PROLAWS SESSIONS

WEDNESDAY, MAY 25, 2016

10:30 A.M. – 12:30 P.M.

Disaster Recovery: Are You Ready?
Presented by Sid Solano and Jason Davey from Sessions, Fishman, Nathan & Israel
Not only is your ProLaw database a major part of your firm’s daily operations, but so are all of your documents, office products, servers, and workstations. Join us for a look at best practices for disaster recovery for all the technical aspects of your firm. This session also will have a client speaker who will discuss their firm’s Disaster Recovery plan.

CUMBERLAND 3

1:30 P.M. – 2:30 P.M.

A Conversation with ProLaw Product Management
Presented by Maurice Williams and Cynde Carley
Here is your chance to meet with the Product Management Team and ask your questions regarding the current and future development of ProLaw.

CUMBERLAND 1

Advanced ProLaw Billing Functions
Presented by Courtney Markham
Learn how to run paperless prebills, how to edit prebills from the dashboard, and how to perform mass edits to transactions in order to streamline the billing process.

CUMBERLAND 2

3:00 P.M. – 4:00 P.M.

.NET Pro Filing and Outlook View Functionality in ProLaw
Presented by Randall Miles
Discover how to use the functionality of Pro Filing for Outlook, Word, and Excel. Discuss the steps needed to implement Pro Filing in your firm. We also will discuss the Outlook View functionality and how to use it successfully.

CUMBERLAND 3

ProLaw Product Update and Roadmap
Presented by Maurice Williams and Cynde Carley
Attend this session to learn about the ProLaw product roadmap. We will provide general information on our plans for potential future enhancements and share updates on the lifecycles of ProLaw products.

LEGENDS G
PROLAW.
BECAUSE THE NEED FOR CRITICAL DATA DOESN’T STAY IN THE OFFICE.

RUN YOUR BUSINESS FROM WHEREVER YOU ARE. ProLaw® Mobile from Thomson Reuters Elite™ moves at the speed of business to help you make the most of every minute. You can view current matter information and documents, schedule and save appointments, and save emails and attachments. Enter your time when you’re in transit or between appointments. And know your entire team is current because the unified ProLaw database is always up to date. It’s software on the move for lawyers on the go.

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## EXHIBITORS/SPONSORS

### VANTAGE EXPO HALL HOURS
- Monday, May 23: 9:30 A.M. – 7:45 P.M.
- Tuesday, May 24: 8:30 A.M. – 4:45 P.M.
- Wednesday, May 25: 8:00 A.M. – 3:00 P.M.

### EXHIBITOR BOOTH

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