

# DFTECHEXPO2010

REFLECT REFINE REFRESH



Data Fusion's 6th Annual Training Expo  
SURF & SAND RESORT • LAGUNA BEACH, CA • APRIL 26-28



Dear Prospective Attendee,

February 8, 2010

I'm very pleased to invite you and your colleagues to our sixth annual training event: **DFTECHEXPO2010**. Our theme this year is "Reflect Refine Refresh" with a focus on taking stock and renewal of our collective pursuit of Elite system mastery.

Every year we strive to make EXPO the best opportunity for you to increase the depth of your Elite knowledge, learning directly from the leading authorities on the subject matter. Our instructors reformulate and refine their materials to reflect industry changes and present up to the minute information you can use immediately. Our sessions are small and focused and audience participation is encouraged. Participants have opportunities to learn from the instructors, the course materials and each other as common issues are raised and tackled in a distraction free environment.

As in years past, our popular seminars will include hands-on sessions and the Data Fusion team will once again be joined by independent industry experts Andy Relis and Dennis Gerrity. We will also have representatives on hand from Thomson Elite, Omtool, Hildebrandt Baker Robbins, Global Exchange, and Chrome River to demonstrate and discuss their latest product offerings.

Based on your overwhelmingly positive feedback from last year, we've decided to once again host the EXPO at The Surf & Sand Resort in Laguna Beach, California. Dust off your sunglasses, flip-flops and thinking caps and get ready to join us for two and a half days of education and rejuvenation on April 26 – 28, 2010. Take advantage of our early-bird discount and register by March 8th for only \$1,195. This is a limited time offer; space is limited and we may sell out so if you plan on going, secure your approvals today. Go to [www.dftech.com](http://www.dftech.com) or you can call us at 714-777-1800 to register.

See you at The Surf and Sand,

A handwritten signature in black ink that reads "Alan Corcoran". The signature is written in a cursive, flowing style.

Alan M. Corcoran  
President  
Data Fusion Technologies, Inc.

# Monday Sessions

9:00 - 10:30

## Tracking Your Electronic Billing

Led by Bill Marquino and Mary Moroney 

This session will show you how you can track your electronic bill files from bill generation all the way through to acceptance with your e-billing vendors. EBT is the tool that will help you track all of your Firm's e-bills. Using EBT, e-bills are tracked from generation through submission or rejection(s) (if any) and ultimately to acceptance. This information can help the firm identify reoccurring e-billing problems that delay the delivery of the bill to the client and provide the tools you need to make e-billing a smooth process.

## Elite Document Studio – Making Basic Changes

Led by Gary Reichard 

This session will look at the rules within Document Studio that control the creation of your invoices and how you can update or add new rules to control what gets output. Specific examples that will be covered include adding/changing text, controlling the output of rules using triggers, and creating new formats for fees and expenses.

## Get To Know Enterprise 3.7 and 3.8

Led by Andy Relis

If you're getting ready to upgrade to the next Enterprise release, this class is for you. In this session you will learn about the most popular features in 3.7 and 3.8 and how they will help you to get your work done faster and more efficiently.

## IntelliStat Rollout

Led by Ray Conti and David Hang

This session will walk you through considerations for rolling out IntelliStat to the user community. We will also review setup and configuration options that will help with user adoption, while maintaining data security.

## International Payments & Cost Recovery Integration

Led by Anthony Loicano

Many of today's law firms send funds internationally. Typically, these international payments are for the firms' Intellectual Property group, foreign offices, foreign vendors, global payroll, and various other worldwide transactions. These international transactions also must be recorded in the firms' financial and billing systems. As a result, this process is timely, complex, and costly – and must involve a bank or secondary provider when remitting funds throughout the world.

This session will explore innovative solutions for this complex, costly, and mandatory task. Experience the difference of an FDIC regulated provider specializing in law firm payment solutions with full integration into Elite®. From outsourcing your invoice entry, to reviewing invoices online for flexible payment release, to an online vendor interface – the firm will enjoy the highest level of value, experience, and risk free global payment solutions in the industry. As a division of Fulton Bank, N.A. Global Exchange Group has the distinction of offering any size firm an array of cost effective payment solutions that protect the firm at the federal banking level – There is a difference.

LEGEND

 New Session

 Hands-On Session

# Monday Sessions

10:45 - 12:15

## Elite Document Studio – Using the Data Join & Fragment Rules

Led by Gary Reichard



During this hands-on session we will cover examples for when the Data Join & Fragment Rules will be necessary to implement and how to set up the rules in order to achieve your desired output.

## IntelliStat Reporting Introduction

Led by Ray Conti and David Hang



This hands-on session will walk you through the basics of creating and distributing IntelliStat reports. Topics will include selecting a report level, selecting statistics, options and field filters, distribution of reports via shortcuts.

## It's a Brave New World – Invoice Level UDF's

Led by Andy Relis



This session will introduce you to the new Invoice level UDF functionality. You will learn how to setup various types of invoice UDF's and how to populate and report on them.

## Managing Better with Dashboards

Led by Sonny Yoon and Don Gibson



So now that your firm has put in a data warehouse and reporting package, has that solution resulted in a better, smarter firm? This presentation will show you how to leverage your business intelligence investment to drive better performance and change behavior. We will discuss how to enhance current off-the-shelf solutions using visual indicators to publish actionable information and predictors using clear succinct measures customized to address business drivers throughout your organization. Examples include identifying early trends in payment behaviors that could

indicate client relationship issues or highlighting how trends in a certain group's utilization could affect longer range cash flow.

## Strategies for a Successful Enterprise Upgrade and Case Conversion

Led by Dennis Gerrity and Debbie Mills

The first topic that will be covered in this session is an Enterprise upgrade and the tasks that should be done during the five phases of an upgrade. The phases include planning and budgeting, pre-migration work, test migration, training/testing, and the final migration. The second topic we will cover is an actual task in the test migration - the change to case insensitivity. We will explore in detail what is involved in the conversion to case-insensitivity, how to properly plan for it, the advantages of operating in a case-insensitive environment, how the conversion works, and the impact of the conversion on your data and your users. A sample budget worksheet will be provided as part of this session.

*"I thought it was one of the best I have attended. It was obvious that DF was interested in learning from its clients how to better meet their needs as opposed to plotting a course for product enhancements just for the sake of upgrading."*

*Kurt Harmon  
Quarles & Brady*

# Monday Sessions

1:45 - 3:15

## Connecting Excel to Enterprise

Led by Rich Mogy



In this session you will learn how to set up reports in Excel using data from the tables in your Elite system. Every aspect of this function will be explored and practical samples will be set up and shown during the session. Attendees will see how to access the report settings in order to add columns (expressions) and tables, limit data with where and having clauses, and organize the output using the group by and order by options as well as join many tables to use the full power of the relational database system.

## Elite Administration Extras - Part I of 2

Led by Dennis Gerrity

A heavy dose of helpful Elite server administration tidbits to make you indispensable. Learn a few extra administrative tasks to help ensure a healthy application and database server, as well as tips and tricks for diagnosing server problems. Gain familiarity with database tools such as SQL Server Profiler. Learn how to read and interpret Elite's EIS log files. Bring your laptop for a live look at your server's EIS logs.

## Introduction to Data Fusion Financial Reporting (DFFR)

Led by Jeff Suhr

In this session you will learn how you can create, modify and distribute elegant financial reports using Data Fusion's Financial Reporting solution. In addition, you will see how existing FRx templates can be imported into the system and how you would go about modifying the "matrix" components of each of these reports (rows, columns trees). Finally, you will see how reports can be previewed for final accuracy before being published via SQL Reporting Services to the users of the firm.



# Monday Sessions

1:45 - 3:15 CONTINUED

## Introduction to SQL

Led by Ling Liu

This session is an overview of SQL and what it can do for you. You will be given examples so you can see how easy it is to learn. By the end of the class, you'll be able to extract simple data from the Elite database!

## Understanding the Rate Hierarchy and Volume Discounts

Led by Andy Relis

In this session you will gain an understanding of the rate hierarchy and volume discounts as well as other useful rate features that are available in Enterprise 3.7 and higher.

## Elite Balancing - The Necessities

Led by Debbie Mills

This session will provide you with the steps to find the areas in the Elite system that need to be balanced based on your masking set ups. You will also learn how to set up your balancing spreadsheet and how to set up existing reports and/or create custom reports to assist with balancing. A sample balancing worksheet will be provided as well as sample custom general SQL reports .

3:30 - 5:00

## Additional Topics in SQL

Led by Allen McPheeters

Designed for the student with some SQL experience, this hands-on class will cover temporary tables, three of the most dangerous commands in SQL, and other topics as time permits.

## Data Structure - Finding Fee and Expense Values in the Elite Database

Led by Gary Reichard

Every firm uses custom reports and/or queries to gather information on fees and expenses. Understanding where that data is stored, and which tables to use for certain reports, is crucial for getting the correct values. From matter level work in progress to client level accounts receivable to timekeeper collections we will look at the tables that hold the data and which ones to use for which reports. We will also review the billing process and which database tables are updated at key points along the way. We will also look at associated tables that affect reporting and identify important elements needed to gather the desired data.

## Data Fusion Financial Reporting (DFFR) Internal Review

Led by Kenneth Borrowdale

The intent of the session is to provide a look at key internals of the system including the database design, conversion from FRx, and a close look at the mechanics of the reporting engine.

## Elite Administration Extras - Part 2 of 2

Led by Dennis Gerrity

See description on page 3.

## IntelliStat Reporting Advanced Topics

Led by Ray Conti and David Hang

This hands-on session will walk you through advanced topics in IntelliStat Reporting, such as: Using Outer Join logic; Including transaction detail timecard, cost card, invoices in reports; Including full narrative descriptions for transactions and complex filters.

# Tuesday Sessions



9:00 - 10:30

## Advanced SQL – Intriguing Table Relations

Led by Gary Reichard 

Gathering data from your Elite system is sometimes not as intuitive as you would like it to be. This hands-on session will take a look at some of the table relations where folks stumble when writing their SQL statements against Elite tables.

## Advanced VBA

Led by Kenneth Borrowdale

This session will provide an in-depth look at VBA capabilities within

the Enterprise framework. The time will be spent reviewing real-world VBA code that has been developed and deployed within the past year.

## Customizing Your System With Tools and Options

Led by Andy Relis

This session will provide you with all of the necessary tools required to customize your queries, screens and data dictionary. You will also get an overview of the many options that control your system that aren't always covered in the upgrade documentation.

## Elite Data Integrity - A Step Further - Part 1 of 2

Led by Debbie Mills

This is the first of two sessions where you will learn how to run data integrity programs that are essential to keeping your data clean. We will cover the standard Elite Enterprise programs that are accessible from the client as well as those that are run in the back-end and we will review the custom Data Fusion integrity and balancing SQLs used in our advanced integrity reviews. The areas of focus will be master files, transactional tables and summary tables both in the Billing and Financial systems. Script files for running back-end programs and SQLs will be provided.

## IntelliStat Financial Planning (ISFP) – Employee Expense and Revenue Modeling

Led by Emily Hartwig 

This hands-on course is designed to assist ISFP administrators with creating and updating the employee expense model for a new budget year. We will also cover the creation of standard expenses, taxes (FICA, FUTA, SS) and unique expense rules. We'll wrap up with an overview of the Revenue Model and how to get started.

# Tuesday Sessions

10:45 - 12:15

## Best Practices in Profitability Analysis Using IntelliStat

Led by Jeff Suhr

In this session you will learn Best Practices in use today for analyzing and applying profitability analysis across the business units of your firm. We will explore different cost allocation strategies and how they can be tailored to help promote positive behavioral change within your firm's financial management function. In addition, you will learn how IntelliStat can be leveraged to measure specific revenue metrics, and to allocate costs throughout the firm by integrating ELBS, FMS, Payroll, Budgeting, Partner Compensation and HR systems.

## Elite Data Integrity - A Step Further - Part 2 of 2

Led by Debbie Mills

See description on page 5.

## Elite Server Virtualization

Led by Dennis Gerrity

If you're not virtualizing, you should be considering it. Learn why. Virtual server technology, including VMWare and MS Virtual Server, is undergoing an implementation explosion in the IT infrastructure. Virtualization will allow you to efficiently manage hardware resources and can vastly simplify DR planning. Discuss why VMWare is increasingly being used by Elite customers to deploy Elite servers and create hardware-independent images for DR, and learn how not to use it.

*"In comparison to PeopleSoft/Oracle/Ariba, this conference was significantly smaller, but did a better job of providing training and answering questions. Great instructors! Ken, Debbie and Andy were terrific!"*

*Jeanne Walker  
DLA Piper*

## Introduction to Extend

Led by Ling Liu

In this hands-on session we will learn what Extend is, what it can do and how to do it. We will work on a few of the pre-set notifications so that notices will automatically be sent to you!

## User Access Untangled

Led by Andy Relis

This session will focus on the various levels of user-access. We will look at the standard ELBS and FMS controls and you will learn how to use Form Editor to provide a more comprehensive system security. When you return to your office you'll be able to tighten up the access to gain some control over the system.

## Using the SQL Table Report

Led by Gary Reichard

This session will look at how to set up and store reports using the SQL Table Report in Elite. We will identify the report options and how they affect output as well as look at the components of the report and what they are used for.

# Tuesday Sessions

1:45 - 3:15

## **Additional Topics in Extend**

*Led by Allen McPheeters*

Building on the Intro to Extend class this hands-on session will focus on customizing events and creating new custom events using Simple Query and SQL Select.

## **Business Benefits of Expense Report Processing Automation**

*Led by Alan Rich*

The legal industry leaders of Chrome River have leveraged their many years of experience and market awareness to build a new set of Software as a Service technologies targeted specifically at solving the issues of expense reporting within professional service firms, including policy compliance, receipt image integration and approval routing. Come review and analyze the specific benefits and direct costs savings associated with expense report processing automation.

See how the latest Rich Internet Application architectures and Business Rules Engines used with Chrome River Expense have been tailored to deliver an exciting new application that administrators and users truly enjoy, with the full features and functionality of traditional desktop applications. These major innovations have made this unique service immediately exciting to many leading law firms including 18 of the AmLaw 100 law firms and many customers with under 100 lawyers as well.

## **Elite Role Manager & SQL Server Security**

*Led by Dennis Gerrity*

How Elite security works under the covers and why you don't want your auditors to know. Elite's security model won't impress anyone

at cocktail parties but it is functional. It does tend to raise the eyebrows of security auditors, however. Learn about some gaps in the standard security model and how to salve the nerves of auditors by implementing SQL Server application roles using Elite Role Manager.

## **IntelliStat 6 Administration**

*Led by Ray Conti and David Hang*

This session will focus on common administrative tasks and the new concepts and approaches for data security. We will also review the differences in v6 administration, compared to past versions.

## **Success Stories On Automating the Partner/Attorney Evaluation Process**

*Led by Bill Marquino*

In this session you will hear success stories from your peers that have successfully implemented an automated evaluation process. We will review the various aspects of partner evaluations which are often driven largely by quantitative information such as performance as a billing, working, and/or originating attorney. We will also cover the associate evaluation process which typically has a quantitative component but is driven more by qualitative information such as partner reviews and recommendations.

# Tuesday Sessions



3:30 - 5:00 CONTINUED

## 7 Cool Features of Windows 7 NEW

Led by Alan Corcoran

A light look at some of the features of Windows 7. This is not for technical power users, it is aimed at curious casual users that have not yet upgraded to Windows 7. Features will be described and, to the extent feasible, demonstrated. Ideally users may gain some insight with regard to the overall value of upgrading.

## Document Capture and Routing Solutions Extends to Vendor Invoice Processing (VIP) NEW

Led by Thaddeus Bouchard

This session will discuss how you can expand your document capture (scanning) infrastructure to efficiently capture, distribute, approve, archive, and ultimately manage, your firm's invoices and other client-billing related documents. As a result, you will increase time to revenue, increase productivity, and have confidence in a reliable electronic archive system to store of all your billable documents.

## IntelliStat Architecture, Sizing, and Performance Tuning

Led by Jim Buyens and Phil Dearmore

Get the hottest information and recommendations on choosing servers that maximize IntelliStat performance and reliability. Learn what has worked and what hasn't at a broad base of IntelliStat sites. Become proficient at diagnosing problems from system and application logs. Includes both hardware selection and software configuration.

## Retrieving Key Budget Data through IntelliStat Financial Planning (ISFP) NEW

Led by Emily Hartwig

In this class you will learn how to retrieve key budgeting data in ISFP and how to manage and distribute end user reports such as the variance and profit & loss report. We will also show you how to create your own ad-hoc reports using ISFP's Custom User Procedures and SQL Stored Procedures.

## SQL Server Reporting Services: IntelliStat Integration NEW

Led by Jonn Bogart

In this class we will demonstrate some new & exciting ways SSRS has been integrated into IntelliStat at some of our client sites. Features that will be covered are the SSRS Menu Handler and the SSRS Report Viewer. The remainder of the session will be open for discussion on possible directions and client needs for further integration into IntelliStat.

# Wednesday Sessions

9:00 - 10:30

## IntelliStat User Group & Product Roadmap

Led by Jeff Suhr

In this session we will review the advancements made with our product line over the last year and we will discuss and preview current and future software initiatives. This session also serves as a forum to communicate the features that you would like to see implemented in future product releases so we ask that you bring all of your ideas so that they can be shared with your peers as well as our technical team.

## It's A Brave New World – Invoice Level UDF's NEW

Led by Andy Relis

See description on page 2.



10:45 - 12:15

## IntelliStat 6 Beneath the Hood NEW

Led by Jim Buyens and Phil Dearmore

Get the inside scoop on the performance, features, and flexibility that make IntelliStat 6 the best release ever. Learn how to configure and utilize IntelliStat 6 to gain the maximum advantage for your firm.

## SQL Server Reporting Services: Intro to Building Reports & Models Using IntelliStat Reporting Data NEW

Led by Jonn Bogart

In this SSRS training course, you will learn how to use SQL Server Reporting Services to create, execute, and manage reports using all of the SSRS components provided through Microsoft. You will learn how to create & publish tabular, matrix (cross-tab), and chart reports, utilizing IntelliStat data, in Visual Studio and SQL Server Business Intelligence Studio. You will also learn how to create & publish an SSRS Model utilizing IntelliStat data for use by report developers.

## IntelliStat Reporting Advanced Topics - Encore NEW

Led by Ray Conti and David Hang

See description on page 4

## Understanding the Rate Hierarchy and Volume Discounts NEW

Led by Andy Relis

See description on page 4.

# Industry Experts

**Jonn Bogart**, Lead Software Developer, is responsible for developing and integrating new technologies and functionality in the various Data Fusion Product lines and services. Having over 17 years of experience in the IT industry; in software and system development, team management, database design and administration, & Network and System administration. Jonn has been involved primarily in developing and administering large data analysis system for both government and commercial entities. He has worked and developed extensively in SQL Server Reporting Services since it's inception in SQL 2000.

**Kenneth Borrowdale** has been working in the legal software industry for more than 25 years having joined Thomson Elite in 1991. As Director of Software Development for Thomson Elite, he led a staff responsible for developing and maintaining all applications in the financial and practice management systems. As a lead developer with Thomson Elite he was the principle designer of the Elite Accounts Payable and General Ledger systems. He also designed and programmed the key components of the Elite Globalization Release (EGR). Kenneth was the primary designer and developer of the FRx DirectLink Interface and designed the 1099 Generator. Kenneth is now a Senior Consultant for Data Fusion.

**Thaddeus Bouchard**, a 20-year veteran of the software and hardware industry, is responsible for directing all aspects of technology, business-process improvement, and system development. He brings extensive systems development and information management expertise along with a wealth of project-management experience. Bouchard joined Omtool in 1998 as director of product management and quickly rose to vice president of products in 1999. Previously, Bouchard was founder and CEO of NetValu Corp., a Web-based provider of technology and services for profiling the interests of Internet users. Thaddeus has also held product-management, marketing and engineering positions for AT&T and Lotus Development Corp.

**Jim Buyens**, Chief Technology Officer, is responsible for Data Fusion's overall technical direction and product development. He has over 20 years of IT experience as System Developer, System Architect, Server Administrator, and Development Team Leader, primarily involving financial systems. An early proponent of the Web, he's also written thirteen computer books on Web Design, Web Programming, Windows SharePoint Services, Visual Studio, and Beginning Programming.

**Ray Conti**, Product Specialist for Data Fusion's IntelliStat Group, has over 25 years of experience with law office automation systems. In the course of his career, Ray has been involved in development, training and support of a wide variety of systems. His extensive industry experience with the Elite suite of applications greatly benefits the IntelliStat client support team.

**Alan Corcoran's** collaboration with Larry Laing spans two companies, three billing systems and 27 years. In that time there are few aspects of legal technology he has not encountered. He currently serves as Company President and remains an active member of the Data Fusion consulting team.

**Philip Dearmore** has worked as an Application Developer for Data Fusion for almost five years. Philip has over 10 years worth of experience with software development over a wide range of applications, including financial reporting, project management, health care, and other intranet based products.

**Dennis Gerrity** has worn several hats since becoming a prop top in 1980, including software architect and developer, computer-telephony integration, business finance analyst and IT manager. He has worked in the legal environment since 1986 and in 1995 formed Syndet Business Technologies. Syndet specializes in Elite server engineering, administration and troubleshooting. Syndet wrote the book (literally) on building Elite servers and has performed Elite system installations and migrations for 15 years. In 2000 Syndet and Elite partnered to build and manage Elite's hosted offering, e-Connect, which provides a secure Internet-based hosted environment for Elite's applications.

**Don Gibson** is the architect of Hildebrandt Baker Robbins' unique Business Intelligence service, which includes designing advanced management reporting systems that align business goals with targeted metrics designed to drive behavior to best achieve results. In recent projects, Don has delivered graphical user interfaces or dashboards, which present the user with information in readily understandable formats and enable direct action on the part of the individual. Don holds a BBA, and has over twenty years experience in law firm information systems and business operations management. He has extensive technical and end-user expertise in the major law firm accounting systems including Elite Enterprise, Elite 3E and Aderant CMS.

# Industry Experts

**David Hang**, Director of Implementation for Data Fusion's IntelliStat Group, is responsible for over-seeing all IntelliStat operations, support and consulting services. He has nearly 12 years of experience in management consulting, systems implementation, and project management. Prior to joining Data Fusion, he was a Consulting Manager with Interwoven responsible for business development, client services, and project management for the West Coast.

**Emily Hartwig**, Implementation Consultant for Data Fusion's IntelliStat Group, specializes in IntelliStat Financials and IntelliStat Profitability. She performs ISFP and Profitability installations, upgrades, customizations, troubleshooting, and provides general support for these modules. Prior to joining Data Fusion, Emily worked in the legal environment for over 10 years with 6 years of experience in Elite and other various accounting system applications.

**Larry Laing** is the Chairman and Founder of Data Fusion Technologies. Larry has over 30 years of experience in Law Office technology, and is one of the leading independent technical authorities on the Elite system. In addition to performing most of the early large-firm database conversions, Larry is widely regarded as one of the foremost experts on report development and database management in the Elite community. Larry was the original architect of the IntelliStat Business Intelligence system.

**Ling Liu**, Programmer and Analyst for Data Fusion, brings 12 years of experience in web development and design as well as database management to the Elite Program Enhancements Group. She is well versed in writing in various languages including Cold Fusion and Visual Basic. Since her start at Data Fusion, her primary focus has been working with custom VBA programming, Extend, and our own Electronic Billing Interface product suite. She also works on custom reports, Whitehill, bill and proforma templates.

**Anthony F. Loiacono, Jr.**, President, Sales & Marketing is the co-founder of Global Exchange Group and brings more than 21 years in international banking, legal, and business development experience to his current role. As president, Sales & Marketing, Mr. Loiacono is accountable

for all aspects of strategic growth and planning as well as business development and also has responsibility for client integration and new product development for the company. Prior to forming Global Exchange Group, Mr. Loiacono held positions in corporate foreign exchange with Thomas Cook; client development with Thomson Reuters; and district management with Automatic Data Processing. Mr. Loiacono holds dual degrees in Information Sciences and Business Management from Temple University, and is a member of the board of directors for Global Exchange Group and the Chester County Economic Development Council.

**Bill Marquino** is a Senior Consultant at Data Fusion. Bill has nearly 25 years experience in the computer hardware and software industry, with the last 10 years focused exclusively on the Elite Professional Billing System. Bill's skills in Web development have been focused on creating custom applications such as G/L Inquiry, E-Bill Tracking, Custom Client Billing Arrangement Systems, and firm-specific Attorney Evaluation modules, all using the standard Web browser to access information in the Elite database.

**Allen McPheeters**, Manager of Data Fusion's Elite Program Enhancements Group, has nearly 18 years of experience in software development for major software publishers like Sierra On-Line and Microsoft. His expertise covers user-interface design, software development, and project management. His primary focus is in custom 4GL, SQL, and Visual Basic programming, as well as Whitehill template development and Extend event notification management.

**Debbie Mills**, PMP, Senior Project Manager for Data Fusion's Consulting Services Group, has more than 25 years of experience in law office accounting, with the last 18 years focused on Elite. Debbie manages the Consulting Services Group which focuses on Elite software upgrades, platform migrations, database mergers, conversions, and complex balancing issues. Prior to joining Data Fusion, Debbie spent 8 years at Elite working as the Large Firm Implementation Team Manager in charge of over 100 implementations.

# Industry Experts

**Rich Mogy**, Senior Project Manager for Data Fusion's Consulting Services Group, has more than 18 years experience working with the Elite Professional Billing System. Prior to joining Data Fusion he worked as a Financial Analyst for Proskauer Rose. During this time he managed their billing system and was responsible for their EGR upgrade, multi-company/currency implementation and reporting needs. Rich also worked as a support representative and systems consultant for Thomson Elite for 13 years. He has extensive knowledge of the Elite system and specializes in FRx, VB Scripting, and Excel report writing.

**Mary Moroney** is a Senior Applications Analyst with Sidley Austin LLP. Mary has over 10 years of Law Firm Billing experience with both the front end of bill generation to the back-end bill processing in Elite. For the past 7 years Mary has worked on implementing over 100 clients from paper billing to electronic billing at Sidley.

**Gary Reichard**, Director of Training for Data Fusion's Consulting Services Group, is a professional educator with over 13 years of teaching experience. During his tenure with Data Fusion, Gary has developed hands-on and lecture style classes aimed specifically at using the Elite software with other 3rd-party programs like IQ Objects and Crystal. He has led training seminars covering nearly every aspect of the Elite system.

**Andy Relis** has over 26 years of experience as an Elite consultant/trainer on hundreds of Elite implementations and conversions. Andy has experience in every version of ELBS and FMS from inception to present. She has experience as a project manager and has been responsible for over 30 manual conversions. She has been involved in many multi-company, multi-currency, multi-office implementations for both Legal and non-Legal firms. She provides on-site support, database troubleshooting and advanced training.

**Alan Rich** is co-founder and CEO of Chrome River. Alan also co-founded Elite Information Group which provided numerous financial and practice management applications for the professional services markets including the worldwide market leading Elite Enterprise. He guides software design and has worked with numerous organizations globally to implement innovative technology and provide expertise in financial management systems.

**Jeff Suhr**, Senior Product Specialist for Data Fusion's IntelliStat Business Intelligence Suite, has over 15 years of legal/financial systems experience. In his role at Data Fusion, Jeff is involved in the management, marketing and consulting areas for IntelliStat Business Intelligence, Budgeting and Financial Reporting products. He maintains in-depth data mining skills which enable information to be gathered from a number of Legal Practice Management Applications (Elite, Aderant, Javelan & others) while also possessing a fundamental understanding of general law firm business analysis and accounting practices.

**Sonnie Yoon** has extensive experience with business process change recommendations and reengineering, as well as conducting needs assessment and analysis studies. Her nineteen years of professional experience, including sixteen years of international system implementation, software training, and project management experience are instrumental in her role as the Practice Leader of Hildebrandt Baker Robbins' Financial Systems Practice. Her primary specialties include project management of large-scale system implementation and advising on a wide range of international implementation issues. Sonnie holds a BS in Accounting from DePaul University, is a registered Certified Public Accountant and Project Management Professional (PMP). She is also a member of the American Institute of Certified Public Accountants.

# Schedule at a Glance

Sunday, April 25						
4:00 - 7:00	Early Check-In & Welcome Reception					
Monday, April 26						
6:00 - 7:00	Yoga - On the Beach					
7:00 - 8:30	Welcome Breakfast & Check-In					
9:00 - 10:30	Tracking Your Electronic Billing	International Payments & Cost Recovery Integration	IntelliStat Roll-Out	Elite Document Studio - Making Basic Changes	Get To Know Enterprise 3.7 and 3.8	
10:45 - 12:15	Managing Better with Dashboards	Strategies for a Successful Enterprise Upgrade and Case Conversion	IntelliStat Reporting - Introduction	Elite Document Studio - Using the Data Join & Fragment Rules	It's a Brave New World – Invoice Level UDF's	
12:30 - 1:30	Lunch - Peer Group Topics and Special Lunchtime Session					
1:45 - 3:15	Elite Administration Extras (Parts 1 & 2)	Elite Balancing: The Necessities	Connecting Excel to Enterprise	Introduction to SQL	Understanding the Rate Hierarchy and Volume Discounts	Introduction to Data Fusion Financial Reporting
3:30 - 5:00		To Be Announced	IntelliStat Reporting - Advanced Topics	Additional Topics in SQL	Data Structure - Finding Fee & Expense Values in Elite	Data Fusion Financial Reporting Internal Review
6:00 - 10:00	A Taste of Laguna					
Tuesday, April 27						
6:00 - 7:00	Yoga - On the Beach					
7:00 - 8:30	Breakfast and Special Session					
9:00 - 10:30	Advanced VBA	Elite Data Integrity: A Step Further (Parts 1 & 2)	ISFP - Employee Expense & Revenue Modeling	Advanced SQL – Intriguing Table Relations	Customizing Your System With Tools and Options	
10:45 - 12:15	Elite Server Virtualization		Using the SQL Table Report	Introduction to Extend	User Access Untangled	Best Practices in Profitability Analysis Using IntelliStat
12:30 - 1:30	Lunch - Peer Group Topics and Special Lunchtime Session					
1:45 - 3:15	Elite Role Manager & SQL Server Security	Thomson Elite - To Be Announced	IntelliStat Administration For Version 6	Additional Topics in Extend	Business Benefits of Expense Report Processing Automation	Success Stories On Automating the Partner/Attorney Evaluation Process
3:30 - 5:00	IntelliStat Architecture, Sizing, and Performance Tuning	7 Cool Features in Windows 7	Retrieving Key Budget Data Through IntelliStat Financial Planning	SQL Server Reporting Services - IntelliStat Integration	Document Capture & Routing Solutions Extends to Vendor Invoice Processing	
6:00 PM	Cocktail Reception and Mardi Gras Madness Gala Event					
Wednesday, April 28						
6:00 - 7:00	Yoga - On the Beach					
7:00 - 8:30	Breakfast					
9:00 - 10:30					It's a Brave New World – Invoice Level UDF's (Encore)	IntelliStat User Group & Product Road Map
10:45 - 12:15	IntelliStat 6 - Beneath the Hood		IntelliStat Reporting - Advanced Topics (Encore)	SQL Server Reporting Services - Introduction to Building Reports & Models Using IntelliStat Reporting Data	Understanding the Rate Hierarchy and Volume Discounts (Encore)	
12:30 - 1:30	Lunch - Grab & Go					



# Registration, Hotel & Air

## Registration and Payment

To register visit our home page at: [www.dftech.com](http://www.dftech.com) under "Upcoming Events" or go to <http://bit.ly/DFTECH2010>. All fees are in USD.

## Group Discount

Firms that register three or more individuals will receive a \$50 discount per person retroactive to the first person.

## The Full Learning Experience

\$1,195 – Early-bird rate if you register by March 8th

\$1,395 – Regular price effective March 9th

Price includes admission to all sessions, session materials, meals & social activities.

## Single Day Pass

\$695 - Monday or Tuesday

Price covers a single day of entry to sessions, materials, meals, and activities.

## Substitutions and Cancellation Policy

Registrations may be transferred to another member of your firm at no charge. Cancellations received in writing before March 15th will receive a 50% credit on account, no credit can be given after that date. Cancellations of travel and hotel reservations are the responsibility of the registrant.

## Car Rental

You won't need a car unless you're planning to leave the area. Our hotel is in the middle of a very active town and there are plenty of things to do and see all within walking distance. But if you must, you can reserve a car from the hotel for \$69.99 per day. Contact the Resort Concierge for details at (800) 524-8621.



## Air Travel

The most convenient airport to fly into is Orange County Airport (also known as Santa Ana or John Wayne- airport code SNA). The hotel is approximately 17 miles or 30 minutes south of the airport. Other local airports are, Long Beach (LGB - approx. 35 miles) & Los Angeles (LAX - approx. 54 miles).

## Hotel

We have reserved a block of rooms at the Surf & Sand Resort at the discounted rate of \$230 per night plus applicable taxes. If you want to extend your stay, please make arrangements with the hotel as early as possible. Our discounted rate is good three days before & after EXPO (subject to availability). You can reserve your room by using the link provided on our event website or by calling the Resort at (800) 524-8621 – make sure to say that you are attending Data Fusion's DFTECHEXPO event. In order to receive our discounted rate you must reserve your room by April 9th.

# Networking & Social Events

## Networking & Social Events

We go to great lengths to make sure that we have a good mix of networking and fun during social activities so you'll want to attend as many as possible.

### LinkedIn

Make sure to join our LinkedIn group so you can start connecting with other attendees, staff, and sponsors. Go to [www.linkedin.com](http://www.linkedin.com) and search Groups for "DFTECHEXPO".

### Get To Know EXPO Intro & Orientation

Whether you're considering DFTECHEXPO or you are already registered and want to get started with planning your trip, this call is for you. We'll review the flow of the event, what is included with registration and what you can expect from the Data Fusion staff, our instructors, and the Resort. We'll also answer questions on sessions, the best airport to fly into, and things to help make your trip go smoothly. The call is scheduled for February 23rd at 8am Pacific, register at: [www.dftech.com](http://www.dftech.com)

### Welcome Reception & Conference Check-In

On Sunday from 4-7pm you're invited to join us for our Welcome Reception and early check-in. Drinks and a light meal will be served.

### Family & Friends Breakfast

On Monday while you're in your first session we'll host your guests for breakfast & introductions. This is a great opportunity for the people that are traveling with you to get together with other guests in our group. The Resort Concierge will be on-hand to answer questions about the surrounding area and things to do.

### Peer Group Luncheons

The learning doesn't stop when we leave the classroom. Every day we'll host lunch tables with a subject matter expert and each table will be marked with topics like Alternative Billing Arrangements, Whitehill, Multi-Currency, Financial Reporting, etc.

### A Taste of Laguna

On Monday evening we'll lead you on a taste & tour of Laguna Beach where you'll have the opportunity to savor the flavor of two local restaurants. We'll end our evening at a an art gallery for desserts and after-dinner drinks.

### Start Your Day Right

Whether you're a seasoned Yogi, beginner, or just want to try this out - meet us on the sand at 6am for stretches and poses that will help get your mind ready to absorb the lessons of the day. This is a private group session and will be led by a certified yoga instructor. Loose pants/leggings/sneakers/socks/bare feet are all appropriate. We will provide you with a mat, towels, and water.

### Ready, Set, Mardi Gras

You have to have a little "just for fun" so to help get you ready for our Gala Event, Larry Laing and Bill Marquino have prepared a couple of sessions to help you beat the odds when you hit the tables on Tuesday night. Session information can be found on the "Social Networking" tab at <http://bit.ly/DFTECH2010>

### Mardi Gras Gala

Fat Tuesday in April? It's Mardi Gras so we can do what we want! We'll meet at the Surf & Sand's Bourbon Street for cocktails at five o'clock and then follow the crowd to our very own French Quarters for food and fun. Jambalaya, Crawfish Etouffee, Beignets, Gambling, Hurricanes, Palm Readers, and more - Laissez les bon temps rouler!



# S p o n s o r s



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Register by March 8th  
for \$1,195  
See you at EXPO!!