ADERANT GLOBAL CONFERENCE
MOMENTUM DENVER'18
HARNESS DATA • ELEVATE EXPERTISE

SESSIONS

BILLING

ENSURE COMPLIANCE WITH CLIENT AGREEMENTS USING GUIDELINES AND BILLING RULES IN ENTITY MANAGER AND EXPERT BILLING

Learn how to reduce costs, billing delays and growing write-offs that frequently result from ensuring compliance to client agreements. Learn about new capabilities within Aderant Expert to assist in tracking, managing and distributing these critical guideline details.

AREA OF INTEREST: BILLING

EXPERT BILLING TIPS & TRICKS

Have you started using Expert Billing? Attend this session to learn more about Expert Billing and capabilities you might not be familiar with yet. See how we can help you reduce billing cycles and improve billing team efficiencies using Expert Billing.

AREA OF INTEREST: BILLING

EXPERT BILLING: AUTOMATION, EFFICIENCY, ACCURACY & PRODUCTIVITY

Attend this session to hear about why you should upgrade to use the new Expert Billing. Learn about automating the billing cycle, streamline distribution, editing and approvals, improve tracking and auditability and more!

AREA OF INTEREST: BILLING

IMPROVE EBILLING MANAGEMENT WITH EXPERT BILLING

Discover how you can improve and automate the management, tracking and visibility of eBills at your firm. Learn about the new eBill Tracking view, eBillingHub Integration and eBilling Vendor Email Monitoring, available within Expert Billing and how taking advantage of these features can improve billing efficiencies and minimize time-consuming interaction with eBilling vendors.

AREA OF INTEREST: BILLING

IMPROVE TRACKING AND VISIBILITY OF WIP AND AR BALANCES WITH ADERANT EXPERT WIP AWARE

In this session we'll show how WIP Aware will help partners better track and manage their matters and, more importantly, take action on critical information or activities requiring their attention using firm and/or client defined policies.

AREA OF INTEREST: BILLING

INSIGHTS ON USING ADVANCED PREMIUM AND DISCOUNT BILLING CAPABILITIES IN EXPERT BILLING

Learn about the new advanced premium/discount capabilities for managing clients, matters and guidelines within Entity Manager. Participants will learn how to manage agreed upon discounts including volume/tiered discounts and gain an overview of these Expert Billing capabilities.

AREA OF INTEREST: BILLING

RATES MANAGEMENT: A METHOD FOR YOUR MADNESS

Review the functionality and general use of the Expert Rates Management module as we highlight our newest features. Learn how the Fee Rate Hierarchy in Aderant Expert can provide you with a better understanding of rate valuation along with tactics to make the most of the application.

AREA OF INTEREST: BILLING

STREAMLINE BILLING PROCESSES AND PREBILL EDITING CYCLES WITH ADERANT PAPERLESS AND ON-THE-GO BILLING

Learn about the value you can gain with Paperless Billing by improving the billing process collaboration between the front and back office. See the improved capabilities and options available with Paperless Billing and we'll show On-the-Go for mobile review and editing of prebills.

AREA OF INTEREST: BILLING

UNDERSTANDING EXPERT BILLING COMPARED TO CLASSIC BILLING DESKTOP

Planning an upgrade to Expert Billing? Find out what's new and different in Expert Billing through this side-by-side comparison of the Classic Billing Desktop and new Billing. Attendees will walk away with key knowledge on how Expert Billing can increase efficiencies, improve bill accuracy and ensure auditability.

AREA OF INTEREST: BILLING

UPDATES IN EXPERT BILLING

Thinking about implementing Expert Billing in 2018? This session will give you a hands-on overview of Expert Billing, highlighting both new and improved capabilities to improve automation, accuracy and auditability.

AREA OF INTEREST: BILLING

WHAT YOU NEED TO KNOW TO PREPARE FOR AN UPGRADE TO EXPERT BILLING

Take this tour to gain all you need to know about preparing for, and upgrading to, Expert Billing! Hear about the strategies for implementing Expert Billing across your firm including set-up options, security, training, workflow, DocuDraft changes and more.

AREA OF INTEREST: BILLING

ACCOMMODATING MULTI-PAYOR AND OTHER SPLIT BILLING SCENARIOS IN EXPERT BILLING

Gain an understanding of all the multi-payor and split billing options you may or may not be using in Aderant Expert. Learn how using these options can improve billing efficiencies and overall invoicing accuracy.

AREA OF INTEREST: BILLING

EXTENDING EXPERT (TECH)

CREATING & CUSTOMIZING RULES

In this session, gain a look at how Expert Rules have been applied across different products and how you can fine-tune them to your advantage.

AREA OF INTEREST: EXTENDING EXPERT (TECH)

CREATING EA PRO TILES

Learn how to create your own EA Pro dashboards tailored to different users in your firm, using the web "menuing" system, and create relevant tile content from inquiries, Spotlight and other data sources.

AREA OF INTEREST: EXTENDING EXPERT (TECH)

CUSTOMIZATIONS ON THE WEB

While our customization platform targets both Desktop and Web applications, learn about the specific aspects of web customizations, Web Forms and tricks, EA Pro and the new "menuing" system, and other web-specific items you need to know!

AREA OF INTEREST: EXTENDING EXPERT (TECH)

EXPERT EXPRESSION LANGUAGE: THE KEY TO ANY EXTENSIONS

The Expert Expression Language is used to set behavior in Rules, SmartForms, Inquiries, Reports, EA Pro Tiles and more! Learn the basics to enable your ability to extend.

AREA OF INTEREST: EXTENDING EXPERT (TECH)

INTRODUCING THE NEW REPORTING PLATFORM

Take a look into the new Reporting platform introduced in 8.2. Topics will include a dive into the new reporting home page, creating reports in Design Studio (and potentially extend this in SSRS), incorporate your existing SSRS reports into the platform, and utilize the new summary table infrastructure.

AREA OF INTEREST: EXTENDING EXPERT (TECH)

OVERVIEW OF EXPERT ADMINISTRATION

Learn more about Expert Administration which is used to set up and configure the Services Framework modules. Gain insights into both the product and system settings that will help tailor the applications to best meet your firm's specific requirements.

AREA OF INTEREST: EXTENDING EXPERT (TECH)

SMART FORMS: ALL YOU NEED TO KNOW

Understand all aspects of Expert SmartForms - see how to extend and create new forms simply, the common properties on a form, how you can add/create user and group versions, simple logic expressions to control behavior, and the recommended steps to change, test and roll out changes.

AREA OF INTEREST: EXTENDING EXPERT (TECH)

SUMMARY TABLES IN REPORTS, INQUIRIES & CUSTOMIZATION

Deeper dive into the new summary table infrastructure, which is available for reporting, inquiries and EA Pro Tiles.

AREA OF INTEREST: EXTENDING EXPERT (TECH)

USING DESIGN STUDIO TO CREATE & CUSTOMIZE INQUIRIES

This session will explore Design Studio and the features and functions required to create and customize Inquiries. Our Experts will guide you through tips and tricks to get you on your way.

AREA OF INTEREST: EXTENDING EXPERT (TECH)

WHAT'S NEW IN EXPERT FRAMEWORK

Check out what's new in the Expert Framework for 8.2, including new logging and system monitoring features, iterative deployment enhancements, iterative design studio and customization features, our new EA Pro Mobile application and more!

AREA OF INTEREST: EXTENDING EXPERT (TECH)

FINANCIAL MANAGEMENT

ACCOUNTS PAYABLE

Attend this session for a hands-on experience with the new Accounts Payable module. Learn how to streamline and improve your accounts payable process with the new features and capabilities introduced in the 8.2 release.

AREA OF INTEREST: FINANCIAL MANAGEMENT

DON'T LOSE SLEEP OVER YOUR GLED08

This session will explain GL balancing for Aderant Expert and how to trouble-shoot GLED08 issues.

AREA OF INTEREST: FINANCIAL MANAGEMENT

ENHANCED ELECTRONIC BANKING WITH EXPERT ACCOUNTS PAYABLE

Electronic Payment capabilities have been enhanced in 8.2 and now support international banking systems. Flexible configuration settings allow set up of different banking systems, field name, lengths, requiredness, etc. without the need to add custom columns or tables. Electronic bank file and email remittance advice formats are now created using Docudraft, the same formatting tool used for Billing formats. We will also discuss what this means for existing clients who have implemented BACS or custom electronic billing processes.

AREA OF INTEREST: FINANCIAL MANAGEMENT

ENTITY MANAGER

Managing entities such as Clients, Matters and Employees is now available within Expert Entity Manager. Attend this session to gain hands-on experience on using Entity Manager for common actions and learn all about what functionality is included in the latest release.

AREA OF INTEREST: FINANCIAL MANAGEMENT

ENTITY MANAGER: THE NEW CLIENT/MATTER MANAGEMENT

Review what Entity Manager will do as a replacement for Client/Matter Management, what they will do separately, and what still needs to be done solely in Classic.

AREA OF INTEREST: FINANCIAL MANAGEMENT

GL MAPPING DEMYSTIFIED

Learn tips and tricks from the Experts to get a better understanding of the intricacies of the Expert GL Map.

AREA OF INTEREST: FINANCIAL MANAGEMENT

IMPROVING THE BRIDGE BETWEEN THE FRONT AND BACK OFFICE

Collaboration between the firm's attorneys, legal assistants, and the finance team is key for creating visibility, enhancing efficiency and increasing productivity. In this session, we'll review a number of Expert applications that enable and automated sharing of information and actions to improve firm processes such as billing and collections.

AREA OF INTEREST: FINANCIAL MANAGEMENT

IMPROVING VISIBILITY WITH EXPERT COLLECTIONS

Gain hands-on experience with Expert Collections to see how it can help improve the visibility, tracking and management of outstanding accounts receivable balances

AREA OF INTEREST: FINANCIAL MANAGEMENT

INTRODUCTION TO THE NEW EXPERT ACCOUNTS PAYABLE AND EXPERT DISBURSEMENTS

Accounts Payable and Disbursements are the newest modules added to the Services Framework. Enhanced data entry, easily import data using Excel, configurable standard workflows for invoice acquisition and approvals, and ability to create rules to monitor/enforce firm guidelines. See what we have delivered in the 8.2 release plus what is planned for the next release.

AREA OF INTEREST: FINANCIAL MANAGEMENT

REDUCE BAD DEBTS & WRITE-OFFS WITH EXPERT COLLECTIONS

Learn how to effectively utilize collections to reduce bad debts (through other applications, like file opening) and write-offs.

AREA OF INTEREST: FINANCIAL MANAGEMENT

UNDERSTANDING EXPERT ACCOUNTS PAYABLE: WHAT YOU CAN EXPECT FROM AN UPGRADE FROM CLASSIC

Familiar with Classic Accounts Payable? Attend this session to learn about the differences, enhancements and new capabilities in Expert Accounts Payable. See how you can improve data entry, approvals and payment cycles with this new module!

AREA OF INTEREST: FINANCIAL MANAGEMENT

UPGRADING TO 8.2 EXPERT ACCOUNTS PAYABLE & EXPERT DISBURSEMENTS

This session will review what has changed between the Classic and the new Services Framework applications for Accounts Payable and Disbursements, what that entails from an upgrade perspective and strategies for using a phased rollout approach and minimizing disruption.

AREA OF INTEREST: FINANCIAL MANAGEMENT

INFORMATION DELIVERY MANAGEMENT

3 CRITICAL STEPS TO SUCCESSFUL CASE MANAGEMENT WITH EXPERT CASE

We'll review how practice groups can utilize Expert Case for their own needs and practice. You will learn about task flows, appointment/deadline tracking and financial integration.

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

EFFORTLESSLY CONFIGURE EXPERT CASE TO FIT UNIQUE FIRM DATA REQUIREMENTS: A BEGINNERS GUIDE

Expert Case can easily be adapted to provide a unique user experience for each of the practice groups in your firm. In this session we will take you through how Expert Case enables you to effortlessly expand law types to meet the needs of each practice group within your firm and enable your firm to meet individual practice area requirements.

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

EXPERT ASSISTANT PROFESSIONAL AND INQUIRIES: WHAT'S NEW & WHAT'S NEXT

Join us as we introduce you to Expert Assistant Professional and Expert Inquiries while we present the newest features found in 8.2.

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

EXPERT ASSISTANT PROFESSIONAL: BRING YOUR OWN TABLET!

Attend this BYOT (bring your own tablet) session to learn all about the new EA Pro mobile application and associated applications designed for the professional to use on their mobile device. Use applications such as On-the-Go Time, WIP Aware, Inquiries and more!

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

EXPERT CASE MANAGEMENT: WHY EVERY FIRM ISN'T USING IT & WHY THEY SHOULD BE

In this not to be missed session, you will learn how this innovative solution streamlines the operational process to centralize all of your case and financial information into one system. See how the intuitive design and navigation has been created to improve your firm's organizational agility through mobility, automation and collaboration.

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

IMPLEMENTING A LPM & PRICING SOLUTION: BEST PRACTICES

Satisfy client demands and expectations for competitive pricing and predictability by utilizing best practices of Legal Project Management (LPM) and Pricing. Join us as we discuss what best practices result in a successful implementation and the trends emerging in the industry.

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

INFORMATION ACCESS: SO EASY ANYONE CAN DO IT!

Expert has made the ability for professionals to access information a priority. See just how easy it has become! EA Pro, Expert Inquiries, WIP Aware, and more; These products provide an integrated and intuitive approach to understanding what you need to know without all the noise.

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

INTRODUCTION TO MATTERWORKS

In this hands-on session, we will introduce you to Expert MatterWorks, a full-featured LPM, and Pricing solution. We will take you through the simple steps of creating a MatterWorks forecast from the bottom up using historical data as well as building a plan utilizing a top-down pricing approach.

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

SPOTLIGHT ANALYTICS IN EXCEL

Advance your knowledge in creating actionable reports and analysis using Aderant Spotlight. This hands-on session will allow participants to expand abilities using Excel Analysis and the Spotlight Cubes. Basic Excel skills (including familiarity with pivot table setup and usage) are a pre-requisite.

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

SPOTLIGHT IN 6 WEEKS: IMPLEMENTATION BEST PRACTICES

Join us as we walk through the knowledge we have gained in our implementation process of Spotlight Analytics. Use these best practices to make your implementation both successful and quick.

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

SPOTLIGHT: PROFITABILITY, PERFORMANCE, & THE POSSIBILITIES

With the release of Spotlight's new accrual profitability module, the possibilities provided to improve performance and profits have grown exponentially. In this session, we will walk you through how to buff up your bottom line and get the most bang for your buck. Be prepared for useful examples and an afternoon of a lot of alliteration.

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

SPOTLIGHT: WHAT'S HERE, WHAT'S NEW, & WHAT'S COMING

Whether you are new to Spotlight or an existing client, this session is for you. We will introduce you to Aderant's Business Intelligence solution, talk about what is new for the most recent release, and what is coming in the future. This jam-packed session will move quickly and feature one of the most handsome and talented presenters at this year's Momentum. The session will conclude with an autograph session (limit one autograph per attendee).

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

WHAT'S NEW IN EXPERT'S MATTER MANAGEMENT OFFERINGS: CASE AND MATTERWORKS

Join us as we explore the exciting world of Matter Management. Learn about the new features delivered in MatterWorks and Case. Hear about our plans for 2018 and beyond.

AREA OF INTEREST: INFORMATION DELIVERY MANAGEMENT

KNOWLEDGE MANAGEMENT

ADDING NEW DATA SOURCES WHILE MAINTAINING & INCREMENTALLY GROWING YOUR SEARCH INDEX

Keep your search environment happy, healthy and growing. Learn best practices on expanding your search environment as well as keeping it in a healthy state using crawls and reporting tools.

AREA OF INTEREST: KNOWLEDGE MANAGEMENT

ADVANCE TOOLKIT TRAINING

In this advanced session, go beyond simple SQL Select expressions in the toolkit. It will cover, among other topics: Stored Procedures, Common Table Expressions, Aggregations and User/Application Options variables.

AREA OF INTEREST: KNOWLEDGE MANAGEMENT

BUILDING AND MAINTAINING A DESIGN FRAMEWORK FOR YOUR INTRANET PORTAL

Designing the user experience in a SharePoint/Handshake environment has some unique challenges. This session will provide some best practices and techniques for creating a proper framework for your Intranet design.

AREA OF INTEREST: KNOWLEDGE MANAGEMENT

BUILDING EFFECTIVE AND ATTRACTIVE CHARTS IN HANDSHAKE

Handshake provides a number of Kendo Charting options, with 100s of properties you can control. This session will walk through the process of creating charts and fine tuning them for the specific look and feel you wish to achieve.

AREA OF INTEREST: KNOWLEDGE MANAGEMENT

GENERATING ADDITIONAL VALUE FROM YOUR SEARCH

Up your search game by integrating additional content using Handshake skins, implement tools and techniques to adjust result ranking, and using guided search to point users to the most relevant content

AREA OF INTEREST: KNOWLEDGE MANAGEMENT

HANDSHAKE PIPELINE

Learn how to leverage Handshake Pipeline to augment your LOB data and integrate content back into your intranet or search environment.

AREA OF INTEREST: KNOWLEDGE MANAGEMENT

HTML5 CONTROLS: GUIDELINES & TECHNIQUES

Attend this overview of all current HTML5 controls provided in the Handshake Content Designer, particularly the new addition of the HTML5ListView control. We will focus on real-world implementation challenges of the various controls and discuss best practices.

AREA OF INTEREST: KNOWLEDGE MANAGEMENT

LIFECYCLE MAINTENANCE OF DEVELOPMENT & PRODUCTION ENVIRONMENTS

Most firms will have 2, often 3 SharePoint/Handshake Environments in their data center. This session will discuss best practices for moving the components of a SharePoint/Handshake solution from one environment to another, and provide information to overcome real-world challenges.

AREA OF INTEREST: KNOWLEDGE MANAGEMENT

LIST GURU: A-TO-Z TECHNIQUES & STRATEGIES

This session will demonstrate and provide hands-on experience with implementing and using List Guru to expose SharePoint content through Handshake Skins. From basic mirroring to advance techniques in combining data, this will be a comprehensive review of this widely used feature for both On-Prem and Office 365.

AREA OF INTEREST: KNOWLEDGE MANAGEMENT

OVERVIEW OF CONTENT MANAGEMENT GOVERNANCE & STRATEGIES

Handshake is an environment that provides a very clear separation between the management of content and the presentation of that content. This session will demonstrate the various options you have to either centralize or decentralize the management of content within your portal.

AREA OF INTEREST: KNOWLEDGE MANAGEMENT

SHAREPOINT ONLINE: WHAT YOU NEED TO KNOW

SharePoint Online has some unique configuration needs to allow Handshake to provide visibility into your internal line of business systems, as well as using the advance presentation tools in Handshake to display SP Online content. This session will cover what you need to be aware of with respect to using Handshake in a SharePoint Online vs On-Prem environment

AREA OF INTEREST: KNOWLEDGE MANAGEMENT

NEW TO EXPERT

DEMONSTRATION OF EXPERT EXPENSES

Overview of Expense Management module including On-the-Go, Approvals, and credit card imports.

AREA OF INTEREST: NEW TO EXPERT

DEMONSTRATION OF EXPERT TIME

Overview of all aspects of Time capture including On-the-Go, Found Time, and Timers.

AREA OF INTEREST: NEW TO EXPERT

DEMONSTRATION OF MATTERWORKS

In this session, we'll review Aderant's pricing and legal project management module. From creating a detailed budget from scratch to building a quick budget from a partner's 'back of the napkin' approach, we'll show how firms are leveraging MatterWorks to first build matter budgets and then monitor actual performance against budget in real-time.

AREA OF INTEREST: NEW TO EXPERT

INTRODUCTION TO MYADERANT SUPPORT PORTAL AND ADERANT ACADEMY

Find out about all the resources available to your firm from Aderant, including software training courses, support case submission, and more! We will also be discussing Aderant's highly secure remote method SecureLink, which is recommended for all clients.

AREA OF INTEREST: NEW TO EXPERT

INTRODUCTION TO SPOTLIGHT ANALYTICS

Join Jeff and Dan for an interactive review of Aderant's business intelligence suite, Spotlight Analytics! In this fun-filled hour, Jeff's AKA 'Wild-eyed, Over-worked Controller' life gets a lot easier by being able to readily access Spotlight's analytic cubes and easily respond to partner requests while no longer being bog-downed by taking a week every month to publish monthly reports. We'll also follow the story of Dan, AKA 'Disillusioned Big City Partner', as he realizes his book of business isn't quite as profitable as he thought it was by leveraging output from Spotlight's profitability model.

AREA OF INTEREST: NEW TO EXPERT

OVERVIEW OF ACCOUNTS PAYABLE

Introduction to Accounts Payable including enhanced features in 8.2.

AREA OF INTEREST: NEW TO EXPERT

OVERVIEW OF BILLING

High-level introduction to Expert Billing including paperless prebill editing and approvals.

AREA OF INTEREST: NEW TO EXPERT

OVERVIEW OF ENTITY MANAGER

Learn about Entity Manager including managing guidelines and AFAs.

AREA OF INTEREST: NEW TO EXPERT

OVERVIEW OF EXPERT COLLECTIONS

Overview of Collections module.

AREA OF INTEREST: NEW TO EXPERT

OVERVIEW OF RATES

Learn about Rates Management including the Fee Rate Hierarchy and other time-saving features.

AREA OF INTEREST: NEW TO EXPERT

TECH ADMINISTRATION

ADERANT TABLE STRUCTURE: GOT QUESTIONS? WE'VE GOT ANSWERS!

A walk-through and explanation of the SQL tables including how they link and flow.

AREA OF INTEREST: TECH ADMINISTRATION

CONFIGURING & CUSTOMIZING DESIGN STUDIO

Come to the hands-on lab to try first-hand configuration and customization via the Design Studio application. Edit forms, implement Rules and validation, create inquiries and reports and other Design Studio features.

AREA OF INTEREST: TECH ADMINISTRATION

CUSTOMIZING EXPERT: BEST PRACTICES

Join the Experts and see customization best practice at all layers of the system, setting up your data, enforcing rules and validation to suit your firm, as well as changing the look and feel of the applications to suit your needs both on the desktop and web.

AREA OF INTEREST: TECH ADMINISTRATION

ENHANCED SECURITY OPTIONS IN EXPERT

Understand the new enhanced security features added to Expert in 8.1.1 including Data masking capabilities, encrypted network traffic, enhanced service accounts including gMSA, application auditing, multi-factor authentication for web applications and other items to meet ISO 27000 certification.

AREA OF INTEREST: TECH ADMINISTRATION

ENVIRONMENT OPTIMIZATION: BEST PRACTICES

General tips and tricks for optimizing your firm's environments, best practices around load balancing, optimizing environments for performance, mobility set up and best practice for client-side installations.

AREA OF INTEREST: TECH ADMINISTRATION

EXPERT SYSTEM MONITORING: BEST PRACTICES

Understand the Expert System monitoring tools, learn what is monitored, what actions to take when issues are identified, dive into the logging and instrumentation tools, and how you could extend the monitoring out.

AREA OF INTEREST: TECH ADMINISTRATION

INTRODUCING THE NEW EXPERT CONSOLIDATED LOGGING

Look into the new logging and instrumentation features in 8.2. Understand best practices around monitoring and administering your system, including finding and troubleshooting issues.

AREA OF INTEREST: TECH ADMINISTRATION

SETTING UP YOUR FIRM WITH MDM

Understand your options in connecting the suite of Expert Mobile Applications to your environment, how Mobile Device Manager can be used, and other options when working with our mobile applications.

AREA OF INTEREST: TECH ADMINISTRATION

SIMPLIFYING THE UPGRADE PROCESS

Discover best practices for how you can simplify upgrades from Expert 8.1 to Expert 8.2 and lay the groundwork to capitalize on the evolution of our deployment and technology processes.

AREA OF INTEREST: TECH ADMINISTRATION

THE NEW DOCUDRAFT

Attend this hands-on session to gain experience with the new DocuDraft. We'll take you on a tour of the new DocuDraft Word Addin to simplify template creation and management.

AREA OF INTEREST: TECH ADMINISTRATION

USING THE EXPERT SCHEDULER

Understand the Expert scheduler, examples of how we use it within our applications to run jobs and perform maintenance, and how you can utilize it to schedule your firms needs.

AREA OF INTEREST: TECH ADMINISTRATION

USING WORKFLOW ADMINISTRATION AND TROUBLESHOOTING

Attend this session to learn more about the Workflow system, best practice around administration, the tools available to troubleshoot any issues that may arise, how to gather workflow usage statistics, and understand bottlenecks in your workflow process.

AREA OF INTEREST: TECH ADMINISTRATION

THINK TANK

DRIVING FIRM-WIDE ADOPTION WITH THE RIGHT APPROACH TO TRAINING

Whether you are rolling out a new module or replacing your entire practice management system with Expert, employee adoption is key to ensuring your firm's success. In this session, Aderant's professional training staff will walk through key instructional design techniques you can use to create an easy to deploy and impactful training plan for your firm. From the hard to reach partner to the busy biller, these ideas will help your firm get the most from your investment from day one.

AREA OF INTEREST: THINK TANK

IMPLEMENTATION PHASING & ROLLOUT: BEST PRACTICES

Upgrading or replacing your firm's financial system is a big effort and requires thoughtful planning to execute the change well. In this session, Professional Services leadership will walk through best practice recommendations for timing, phasing and roll out that drive speed to value for your firm.

AREA OF INTEREST: THINK TANK

IMPLEMENTING PAPERLESS BILLING: A CASE STUDY WITH AKD LAWYERS

Attend this session to hear how AKD Lawyers have streamlined their billing processes with their implementation of Aderant Expert Paperless Billing. Gain an understanding of their process, benefits achieved and lessons learned.

AREA OF INTEREST: THINK TANK

SPEED TO VALUE: HOW TO GO LIVE WITH COLLECTIONS IN 30 DAYS

You've invested in Expert Collections, so how can you ensure you're getting full value quickly? In this case study oriented discussion we'll walk through the key steps to have you live on Expert Collections in 30 days.

AREA OF INTEREST: THINK TANK

TIME & EXPENSES

A TIMEKEEPER'S DREAM: 3 WAYS TO IMPROVE TIME TRACKING WITH EXPERT TIME

Join us for tips & tricks on using Expert On-the-Go Time to help keep your timekeepers agile in the workforce.

AREA OF INTEREST: TIME & EXPENSES

CUSTOMIZING TIME CARDS IN EXPERT TIME

Customizing SmartForms is now easier than ever. Attend this session to see how you can easily customize your time cards in Expert Time. We will demonstrate the most common time card customizations, the upgrade utility, and discuss the types of customizations that can be managed through Design Studio.

AREA OF INTEREST: TIME & EXPENSES

ENSURE ACCURATE TIME CAPTURE & IMPROVE COMPLIANCE WITH BILLING GUIDELINES USING THE RULES FRAMEWORK IN EXPERT TIME

Come and hear how you can improve billing efficiencies and invoicing accuracy by ensuring time entries comply with outside counsel guidelines - at the point of time entry!

AREA OF INTEREST: TIME & EXPENSES

EXPERT EXPENSES

Gain hands-on experience with Expert Expense Management to better understand how to streamline expense capture, implement and track approvals, ensure compliance with firm and client rules and speed reimbursement.

AREA OF INTEREST: TIME & EXPENSES

EXPERT EXPENSES: AN IMPLEMENTATION CASE STUDY WITH ORRICK, HERRINGTON & SUTCLIFFE

Hear from Orrick, Herrington & Sutcliffe on the benefits that Expert Expenses can bring to your firm, including insight, experience and lessons learned from their implementation.

AREA OF INTEREST: TIME & EXPENSES

EXPERT TIME

Are you still using Classic Time or Enhanced Time Entry? Attend this session to experience, hands-on, Aderant's Expert Time application to learn how to improve time capture while offering tailored attorney experiences based on personal preferences.

AREA OF INTEREST: TIME & EXPENSES

EXPERT TIME MANAGEMENT ADMINISTRATION TIPS & TRICKS

Get a complete overview of the daily processes involved in Expert Time from an administrator's perspective. Included in the discussion will be best practices, a presentation on ad hoc time reporting, and an explanation of basic troubleshooting tips to make the administrative process easier.

AREA OF INTEREST: TIME & EXPENSES

IMPLEMENTING EXPERT TIME: EVERYTHING YOU NEED TO KNOW

Realize the benefits that Expert Time can bring to your firm. In this session, gain an understanding of a typical implementation process - whether moving from Classic, Enhanced, or Browser Time or from a third party application.

AREA OF INTEREST: TIME & EXPENSES

MASTERING EXPERT TASK-BASED BILLING: BEST PRACTICES

Get an in-depth look at task-based billing in Aderant Expert and learn best practices for setting up new phase/task matter plans, budgets and reports.

AREA OF INTEREST: TIME & EXPENSES

MAXIMIZE & SIMPLIFY TIME CAPTURE WITH RECONSTRUCTION CAPABILITIES IN FOUND TIME

Discover how your timekeepers can maximize their capture of billable time while simplifying the creation of time entries. Learn about Aderant's Found Time module which passively and actively tracks a timekeeper's activities which can be managed both from a desktop and your mobile device.

AREA OF INTEREST: TIME & EXPENSES

ON-THE-GO TIME: IMPLEMENTATION OPTIONS

Thinking about implementing On-the-Go Time? Attend this session to gain an understanding of the various deployment and implementation options with On-the-Go Time.

AREA OF INTEREST: TIME & EXPENSES

REDUCING UNAPPROVED TIMEKEEPER REJECTIONS

Are unapproved timekeepers a common rejection reason on invoices submitted to your eBilling vendors and clients? Find out how Expert capabilities can improve the management of this challenge with automated notifications and streamlined approvals for tracking additional timekeepers on client work.

AREA OF INTEREST: TIME & EXPENSES

SUPPORTING THE AGILE PROFESSIONAL WITH ON-THE-GO TIME

Interested in mobile time capture? Attend this session to find out everything you need to know about using and implementing On-the-Go Time. Hear about the latest developments included in the 8.2 release of Aderant Expert.

AREA OF INTEREST: TIME & EXPENSES

* Session topics are subject to change.