



“Golden Gate” Release

ADERANT Expert “Golden Gate” Release brings the power of embedded workflow to law firms. The next generation of ADERANT’s integrated business management suite leverages Microsoft’s revolutionary platform for building workflow-enabled applications, Windows Workflow Foundation, to help law firms create consistency, improve efficiency, and streamline their client and matter opening processes.

Expert File Opening

In most firms the file opening process represents a complex, time consuming exercise that requires coordinated input, collaboration, and action from numerous departments and individuals. There are often several roles involved with this process, varying levels of review and approval, and interaction with multiple business applications and procedures.

Expert File Opening is a next-generation application that leverages Microsoft Windows Workflow Foundation technology to help firms create consistency, improve efficiency, streamline approvals, and reduce errors associated with manual data entry throughout the client and matter opening process. Available with the ADERANT Expert “Golden Gate” Release, it enables firms to capture information it could not do using paper and provides unrivaled visibility into the status of all workflow activities and the overall progress.

Expert File Opening delivers a file opening process template that provides firms with an initial starting point to workflow-enable their new client and matter intake business processes. The application includes accompanying services and workflow activities to better support the file opening workflow processes and allow for flexibility and customization.

Benefits

- Creates consistency
- Improves file opening efficiency
- Reduces firm risk and exposure
- Eliminates errors associated with manual data entry
- Increased visibility and auditability of the file opening process
- Includes malpractice prevention controls

Key Features

- Automates process to streamline capture and approval of new business intake
- Enables front office personnel to initiate, coordinate, and monitor processes
- Ability to monitor, audit, and analyze business processes
- Includes a starter workflow template for file opening
- Allows for customization of starter template to satisfy firm/department requirements

Built on Windows Workflow Foundation

Expert File Opening is built using powerful new Microsoft .NET Framework technologies, including Windows Workflow Foundation (WF). WF is a programming model, engine, and tools that will allow ADERANT to quickly embed workflow capabilities in every ADERANT Expert application.

File Opening Process Template

Expert File Opening includes a standard file opening workflow process template. The starter template provides law firms with an initial starting point while allowing them to easily customize the process to fit their exact needs. It consists of standard ADERANT Expert and WF workflow activities and a user interface form that law firms can use 'as is' or customize to meet their specific needs.

Expert File Opening's standard process template consists of five main phases: matter intake; reconciliation and conflicts check; administrative review and approval; final inception; and rejection.

Matter Intake

The first process phase is matter intake, which involves the primary capture of new client and matter information.

Reconciliation and Conflicts Check

Next, Expert File Opening reconciles client names, parties, and contacts. The application then moves on to a conflict of interest check using Expert Conflicts, which is seamlessly integrated.

There are two possible outcomes of this phase of the process:

- **Reject:** the new client or matter is rejected and the application automatically notifies users via email and any associated data must be reviewed.
- **Proceed:** happens when the outcome of the name reconciliation and conflicts check is either acceptable or it has been mitigated or resolved.

At this point, approval is given for the workflow to proceed. The client or matter is saved to ADERANT Expert's database and from this point on, time can be recorded against the client or matter.

Administrative Review and Approval

This phase includes multiple steps for various reviews and approvals for the new client or matter. The application simultaneously sends matters out for three administrative approvals for:

- Rates
- Accounting
- Receivables

Final Inception

This final phase includes a series of actions regarding the final approval of a new client or matter. Once completed, the client or matter is saved to the ADERANT Expert database in a fully active status and it therefore becomes available for all applications. The process initiator is informed via email that the file opening has been completed.

Rejection

Rejection is an optional stage with a corresponding set of activities that is reserved for when a client or matter has been rejected at some point during the file opening process.

File Opening Activities

Expert File Opening includes a set of workflow activities that support the new client and matter intake process, such as SaveClient, SaveMatter, GenerateConflictSearch, and more. These activities are in addition to the Microsoft Windows Workflow Foundation and standard ADERANT Expert workflow activities.

File Opening Services

Expert File Opening includes a set of customizable services for the workflow process template for Business Entity, Client, and Matter. Firms can extend and customize these services as needed.

Tracking Progress and Status

Expert File Opening enables users to track the progress of any client or matter opening. Users can view new file information at any point in the process. Status reports show detailed information on the activities completed as well as how many files are open, pending, accepted, or rejected. Additionally, the status reports allow users to see which personnel have been involved in each workflow should any questions come up.

Expert File Opening tracks all activities and actions during a process. The application tracks the start and end of every action, who was responsible, and any changes to activity security, such as task reassignment. This data can be reported on, enabling users to analyze the performance for different processes or activities, or to analyze a particular process and what course of action was taken.