



MOMENTUM DENVER 2023 SESSIONS

MASTER CLASS

Master Class: Advanced Design Studio

Learn advanced techniques of customization for Design Studio. This class will cover advanced rules creation/customization and advanced form customization techniques. A strong background in Expert applications and familiarization with Expert functionality and some level of programming background will ensure you have a successful experience.

[Hands On]

Master Class: Conflicts

In addition to providing an overview of Aderant Conflicts and configuration of this new application, this course will provide side-by-side comparisons of commonly used features in Browser Conflicts and how those features will be performed in Aderant Conflicts, from intake to approvals and everything in between.

[Hands On]

Master Class: EA Pro

This class will focus on everything Expert Assistant Professional (EA Pro), the contextual menu that is the "face" of Expert. Join us to learn how to get the most out of this module, including front end usage, how to adapt and create tiles, secure and modify workspaces, and more. As an added bonus, we will delve into how to extend EA Pro with EA Pro+, the integration with Aderant Handshake, that helps users go above and beyond. A strong understanding of the various Expert applications and familiarization with Design Studio functionality is recommended.

[Hands On]

Master Class: Expert Billing

In addition to providing an overview of Expert Billing, we'll go beyond the basics with a closer look at some advanced billing scenarios. We will walk thru topics such as alternative fee arrangements, multi-payor scenarios, split billing options, delayed splits, advanced and courtesy premium discounts, billing rules, and more.

[Hands On]

BILLING

Track: Billing

All About AFAs in Expert Billing

Learn about all of the different Alternative Fee Arrangements (AFAs) available in Expert Billing. We will show you how to maintain these AFAs in Entity Manager and discuss best practices.

[In Person & Virtual]

Track: Billing

All About Splits in Expert Billing

Learn about the many split options available to you in Expert Billing. Highlighting split billing, split details, payor splits, and delayed splits, you'll gain an understanding of the differences and identify which feature works best for each scenario.

[In Person Only]

Track: Billing

Everything you Need to Know About Expert Rates

Ready to learn more about Expert's Rate Hierarchy? Gain a detailed overview of the functionality and general use of the Expert Rates Management module as we highlight the flexibility of the fee rate structures. This session will provide a better understanding of rate valuation along with tips to get the most value out of the application.

[In Person & Virtual]

Track: Billing

Expert Billing Tips & Tricks

Already an Expert Billing user? Attend this session to learn more about its features and hidden gems. See how you can improve billing cycles and increase team efficiencies utilizing Expert Billing.

[In Person & Virtual]

Track: Billing

Expert Billing Workflows

Join this session to learn about the workflows available in Expert Billing like Draft Bill Review, Edits Approval, and WIP Writedown workflows.

[In Person Only]

Track: Billing

 Hands-On: Advanced Split Billing Scenarios

In this hands-on session, you will learn how to implement advanced split billing scenarios utilizing multi-payor splits and other split billing options. We recommend that you first attend the "All About Splits in Expert Billing" session prior to this class.

[Hands On]

Track: Billing

 Hands-On: Customizing Expert Billing Jobs

Learn how to customize Expert Billing jobs utilizing Design Studio and Schedule Manager. The instructor will walk you through step by step some best practice examples of modifying and scheduling the Create Prebills job.

[Hands On]

Track: Billing

 Hands-On: Introduction to Expert Billing Rules

In this hands-on session, attendees will gain a solid introduction to Expert Billing Rules and learn how to configure, customize, and implement rules within the Expert framework.

[Hands On]

Track: Billing

 Hands-On: Modifying Your Bill Template Using DocuDraft

In this hands-on session, a seasoned expert will provide you with an introduction to DocuDraft and walk you through simple bill template modifications.

[Hands On]

Track: Billing

 Hands-On: Introduction to Expert Billing

Experience Expert Billing in a hands-on lab environment. The instructor will lead you through a set of exercises to gain familiarity with Expert Billing and all of the capabilities available to you and your billing team.

[Hands On]

Track: Billing

 Hands-On: Introduction to Paperless Billing

Gain the perfect introduction to Paperless Billing through this hands-on session, playing the role of both the biller and the partner. From launching the paperless prebill workflows and approving edits as a biller, to electronically editing prebills as a partner would, you'll get to experience all the features that Paperless has to offer.

[Hands On]

Track: Billing

Roundtable: Best Practices for Month End Billing

Join this roundtable to discuss your firm's month end billing processes and what practices work best. Talk about the challenges you face during month end and share any tips and tricks with your colleagues.

[In Person Only]

Track: Billing

Simplify Access to WIP & AR for Attorneys with Expert WIP Aware

In this session, attendees will discover how Expert's WIP Aware module allows partners to better track and manage their matters while freeing administrative teams from producing reports and manually updating data. Learn how lawyers are able to take action on critical information requiring their attention using firm and/or client defined policies.

[In Person Only]

Track: Billing

Transitioning from Classic to Expert Billing

Transitioning from Classic to Expert Billing? Learn what's new and different in Expert Billing with this side-by-side comparison. Attendees will gain an understanding of how the transition can increase efficiencies, improve bill accuracy, and ensure auditability.

[In Person Only]

Track: Billing

What's Next for Expert Billing & Paperless Billing?

Discover the exciting new features coming soon to Expert Billing & Paperless Billing.

[In Person & Virtual]

Track: Billing

A Year in Review, What's New, What's Next

Let's take a look at all the features that have been made available over the past year across all BillBlast modules and a quick peek at exciting new features that are in the works across all modules.

[In Person & Virtual]

Track: Billing

Best Practices When Implementing/Transitioning From One Time & Billing Solution to Another

Join us as we talk with our technical experts. Are you planning to implement BillBlast within the next 12 months? Are you transitioning from one financial system to another? Are you planning to upgrade your current version of Expert as a live BillBlast client? During this session we will be joined with a firm that recently went live with BillBlast and will share best practices, including identifying critical discussions needed.

[In Person & Virtual]

Track: Billing

BillBlast Analytics 101

Basics of types of visuals, interactions with drill through, searching and various filters you can apply through all pages, since page, etc. Basics of each module and high level view into how firms are leveraging each dashboard. If you want to hear how one firm is leveraging, consider joining the Lessons Learned Leveraging Analytics session after this one.

[In Person & Virtual]

Track: Billing

 BillBlast Analytics 102

Deep dive into each dashboard using case studies on how other firms have

leveraged their own data to assist with reporting and understanding how the data can assist them with best practices.
[Virtual Only]

Track: Billing

Common Challenges Firms Face with eBilling and Nuances of the eBill Vendor Sites

There are many challenges in eBilling today. Not only are firms challenged with client requirements but also vendor requirements. Challenges can include new timekeepers being added and approved prior to eBilling, budgets approved prior to eBilling, and following proper LEDES formats. This session will discuss how to identify and resolve those challenges with best practices and tips.
[Virtual Only]

Track: Billing

Common Responsibilities and Criticality of a Firm BillBlast Administrator

Are you responsible for managing the roles of the users in BillBlast and/or managing the onboarding of new billed clients? During this session, we will discuss responsibilities in each module, understanding the options you can select for each user within BillBlast based on their role at the firm, best practices for managing the onboarding on new billed clients, and how to help your users leverage the information provided in each module to streamline the process.
[Virtual Only]

Track: Billing

Learn from a prior auditor how to leverage BillBlast Analytics

Join us for a journey as to how a former auditor leveraged the BillBlast Deduction Analytics..... Are you using BillBlast Deduction Analytics to assist with time entry compliance? Leverage your own data to assist timekeepers with best practices for time entry and understand the impact of not having necessary rules in place at the point of time entry. Gain insight into what the auditors are seeing and learn how imperative it is to leverage that same data.
[In Person Only]

Track: Billing

Round Table Roundup

Join us as we share the results of prior virtual roundtable discussions had with your peers
[In Person Only]

Track: Billing

Split Billingn BillBlast (eBill, Email, Paper Billing)

A deep dive discussion on split billing and how you are able to manage each payor's information within BillBlast. We will discuss expected data being managed in the financial system vs. data that can be managed in BillBlast and provide best practices for both.
[In Person & Virtual]

Track: Billing

Streamline and Automate the Matter Setup Required on eBill Vendor Websites

Join us to learn how BillBlast's new Matter Reconciliation Module is helping law firms to reconcile the firm's internal matter setup to the eBill vendor portal site setup. In this session we will highlight how this module will automate and make

this a proactive process for your firm.
[In Person & Virtual]

Track: Billing

Streamline and Automate the Matter Setup Required on eBill Vendor Websites (Repeated session from Day 1)

Join us to learn how BillBlast's new Matter Reconciliation Module is helping law firms to reconcile the firm's internal matter setup to the eBill vendor portal site setup. In this session we will highlight how this module will automate and make this a proactive process for your firm.
[In Person & Virtual]

Track: Billing

Streamline Email Invoice Delivery and Tracking with the BillBlast Email Module to Meet Client Delivery Requirements

Do you email your invoices to your client for payment? Are you looking for ways to streamline delivery, track the status, identify bouncebacks quickly to resolve problems, or easily refer back to the original sent item to substantiate client requests? Are you looking for a way to follow up with clients on outstanding invoices? Do you have attorneys who still expect to send them their selves? Join us in a discussion that will show you how BillBlast's Email Module can help you with all these questions and more.
[In Person & Virtual]

DOCKETING

Track: Docketing

Court Rules - Frequently Asked Rules Questions

Wondering if you have the same questions related to court rules as other firms? Our Rules Team will be discussing questions that often come in, highlighting areas of potential risk or confusion to be aware of, and related commentary.
[Virtual Only]

Track: Docketing

Court Rules - Important Changes in 2023

Join this discussion by the court rules team to hear about the top court rules changes of 2023 that your firm needs to be aware of.
[Virtual Only]

Track: Docketing

Docketing Tips and Tricks

Join us as we highlight some scenarios that come up in the Docketing space, and tips and tricks on how to address them efficiently.
[Virtual Only]

Track: Docketing

Management Exception Reporting and Quality Assurance

Learn how to leverage your docketing data to identify areas of risk, data anomalies, and gaps to drive better quality assurance around the function of docketing.
[Virtual Only]

Track: Docketing

The Future of the Docketing Profession

This session will provide a small panel discussion on the intersection of technology and docketing, and what the future holds for the profession as a whole.

[Virtual Only]

Track: Docketing

The Milana Roadmap and Vision

Get an inside look on the latest in the Milana development roadmap and product vision, including sneak a peek of upcoming release items.

[Virtual Only]

EXPLORE ADERANT

Track: Explore Aderant

A "Day in the Life" of an Attorney

Take a closer look at the typical activities an attorney would complete through their day – from dashboard reviews, WIP management and general inquiries, through to time recording, expense capture and billing. We'll show how this can be done in the office or on the go with tips along the way on how to maintain engagement from your users.

[In Person & Virtual]

Track: Explore Aderant

BillBlast - Blast ahead on eBilling

With the increasing number of clients requiring eBilling coupled with their ever-evolving requirements, eBilling has become difficult to manage, even the most sophisticated firms. Attend our BillBlast overview and learn how we can simplify the entire eBilling process, from submission and tracking to appeals and compliance.

[In Person & Virtual]

Track: Explore Aderant

Empowering Collectors: Expert Collections

Learn how this module can empower your firm to better manage receivables—whether you have a collections department or each partner manages their own clients. Expert Collections offers automated to-do lists, proactive alerts, embedded workflows, convenient document preparation, and more.

[In Person & Virtual]

Track: Explore Aderant

Expert AP: It Starts with the A!

This session will explore the Expert Accounts Payable module. We'll discuss automation techniques, configurable workflows, payment options, and even OCR capabilities.

[In Person & Virtual]

Track: Explore Aderant

Expert Billing: AFAs, Approvals, Alerts and more!

This session is a high level tour of Billingn Expert. This introductory session will explore the processes, capabilities, and benefits within the billing module.

[In Person & Virtual]

Track: Explore Aderant

Expert Case: All-in-One Case Management

This session will explore tracking key dates to prevent missed deadlines, enable access to critical data for better collaboration across the firm, and provide real-time updates on case status, overdue work, documents, and financial details as a single source of truth.

[In Person & Virtual]

Track: Explore Aderant

Go vi by Aderant!

Discover the world of difference vi by Aderant is making with applicant tracking, tactical onboarding, performance evaluation, real-time feedback, resource allocation, CLE tracking, and skills management software.

[In Person & Virtual]

Track: Explore Aderant

Information at Your Fingertips with Handshake, Drive and EA Pro+

Attend this session to learn how Handshake, Drive and EA Pro+ fosters information sharing, collaboration, client relationships, client satisfaction, and ultimately retention. Handshake combines information from 40+ different systems into easy-to-manage firm dashboards, promoting agile searching and internal collaboration. Discover how Drive creates scalable collaboration sites while providing a secure way to share case and financial data with your firm's clients.

[In Person & Virtual]

Track: Explore Aderant

Insights About Your Firm Revealed by Benchmarking for BillBlast

Explore how Aderant's first Benchmarking offering can drive performance improvement for your firm. Understand your scorecard, identify areas of potential improvement, track your improvement effort progress, and more. Don't rely on anecdotes; leverage powerful data to inform your views and understand your firm's performance relative to peers.

[In Person & Virtual]

Track: Explore Aderant

Milana: The Next-Generation Cloud Docketing Solution

Bringing the best of CompuLaw and American LegalNet (ALN) together, Aderant's new solution, Milana, is driving continuous innovation in the docketing space. Examine how Milana boosts efficiency and provides protection from malpractice risk by automating and streamlining key processes, bringing a modern experience to law firms.

[In Person & Virtual]

Track: Explore Aderant

Simplicity & Compliance with iTimekeep, OCG Live, and Thrive

Attend this session to learn how iTimekeep provides one, unified timekeeping

experience to assist in ensuring compliance, improved revenue, and more accurate timekeeping. In addition to iTimekeep's simplicity and user experience, learn how Aderant can help you enforce compliance at the point of time entry while Thrive assists in monitoring and enforcing your timekeeping policies. [In Person & Virtual]

FINANCIAL MANAGEMENT

Track: Financial Management
1099s - Avoid the January Panic

It's year-end and you are very busy. Find out what you can do during the year to prepare for 1099 deadline in January. We will walk through the new 1099 reporting and how to send 1099s to a different name and/or address, combine multiple vendors to one 1099, and use the TIN Matching services our 1099 partners offer as part of their service. [In Person & Virtual]

Track: Financial Management
Collections Using Expert Collections Rules

This session explores how to setup and schedule automated jobs for collections to surface timely information that can then be utilized to enhance and improve collection efforts. Get alerts for critical short payments, skipped payments, and high value receivables earlier in the process. See the flexibility that jobs can provide for addressing firm specific collection rules and strategies. [In Person & Virtual]

Track: Financial Management
Electronic Payments in Expert AP

This session will walk through Electronic Payments Setup from start to finish. This is a great session if you are implementing for the first time, looking to migrate from Classic, or if your firm already uses Expert AP electronic payments and you want to understand where all the touchpoints and setup pieces are. [In Person & Virtual]

Track: Financial Management
Expert AP - Migrating from Classic AP

Are you looking to move from Classic to Expert Accounts Payable? Find out what is involved with the transition, and best practice advice on implementation, training and rollout. [In Person & Virtual]

Track: Financial Management
Expert AP OCR

Learn how to streamline and simplify your accounts payable data entry of vendor invoices with Expert's Accounts Payable OCR capabilities. [In Person & Virtual]

Track: Financial Management
Expert Imaging Tips & Tricks + What's Coming Next

We love having images at our fingertips in our Expert applications when we need them. Learn more about the modules available, helpful tips and troubleshooting tricks, and information about the new 2022.01 release. [In Person & Virtual]

Track: Financial Management
Getting Paid Faster with LawPay

Panel discussion with Mellissa Chambers from LawPay on the advantages and benefits of accepting credit cards and electronic checks. [In Person Only]

Track: Financial Management
GL Bank Reconciliation

Speed up the reconciliation process with imported bank transactions, intuitive searching, and automated matching. This session will provide an overview of Expert General Ledger Bank Reconciliation and show you ways to improve the efficiency of your firm's cash management. [In Person & Virtual]

Track: Financial Management
 **Hands-On: Collections**

Gain hands-on experience with Expert Collections and see how it can improve the visibility, tracking, and management of outstanding accounts receivable balances. [Hands On]

Track: Financial Management
 **Hands-On: Import from Excel**

Join this fun Hands-On session using Expert's Import from Excel to import Expert Accounts Payable Invoices, Disbursements, and General Ledger Journal Entries. [Hands On]

Track: Financial Management
Roundtable: Accounts Receivable

In this session, we'll talk about the plans for Expert Accounts Receivable for 2023 and the benefits to your firm. [In Person Only]

Track: Financial Management
Using Custom Rules to enforce Firm Policy

Find out how Skadden leveraged the power of Framework Rules as a part of their Expert Accounts Payable implementation by using Rules to add firm-specific validation to avoid keying errors and ensure firm policy and procedures are followed consistently. See examples of what can be accomplished using Rules, all created in-house by this firm. [In Person Only]

INFORMATION ACCESS

Track: Information Access
Aderant Data in Power BI

Power BI is one of the leading Business Intelligence tools and law firm usage is continuing to grow. In this session we'll explore how you can get the most out of Aderant data using Power BI. [In Person Only]

Track: Information Access

Aderant Drive and Client Collaboration

Aderant Drive has helped firms across the globe collaborate better with their clients. This session will dive into the details of Drive, what it is, what it does, and how it can help you.

[In Person & Virtual]

Track: Information Access

BillBlast Analytics & Intelligence

BillBlast Analytics took the industry by storm when it was introduced 3 years ago. Learn more about this exciting product set and its sister product, Aderant Intelligence

[In Person & Virtual]

Track: Information Access

ConnectX; Best Practices from Fireman & Co. and Handshake

ConnectX is the latest collaboration between Fireman & Co (Now Epiq) and Aderant. This long-standing partnership has already produced valuable insights for law firms for almost 20 years. ConnectX brings a best practice KM portal to all law firms, big and small.

[In Person Only]

Track: Information Access

Data Theory; Data Warehouses, Lakes, and More

Data is the new oil - learn how to drill in and find your fortune. In this session we will explore different methods and products for mining data and putting it to use.

[In Person Only]

Track: Information Access

Developing a Best Practice Profit Methodology Using Spotlight Analytics

Join us for a discussion on how to establish a profit methodology for your firm using best practices. Learn about the different profitability models used by firms and what our experts believe is the best approach. We'll discuss approaches for allocating costs, measuring client profitability, handling equity compensation, and more.

[In Person Only]

Track: Information Access

EA Pro+: Handshake & EA Pro does more

EA Pro provides users with a great starting point in Expert and removes much of the complexity of the Expert Model. This session shows you how to extend EA Pro when you ADD Handshake to the mix

[In Person & Virtual]

Track: Information Access

Expert Inquiry Customization

Interested in Expert Assistant Professional (EA Pro) Tiles and Expert Inquiries customizations, including the new column driven inquiries? Join us to learn how your firm can tailor this software to fit your unique needs.

[Hands On]

Track: Information Access

Hands-On: Spotlight Analytics - Using Excel to Interrogate Spotlight Cubes

Dive into Spotlight Cubes using Microsoft Excel. This hands-on session is for those familiar with basic Excel functionality who want to use Spotlight Cubes to interrogate and analyze firm data directly in Excel. Topics will range from how to connect to a cube to designing reports and analysis.

[Hands On]

Track: Information Access

In-depth Customization for Inquiries and EA Pro (AAC)

What can be done with Inquiries and EA Pro? A Lot! Join this session for advanced customizations of Inquiries and EA Pro from the field.

[In Person Only]

Track: Information Access

Overview of Handshake & Drive

Handshake is one of the most exciting products in the Aderant portfolio. This session will provide an overview of the past, present, and future plans including Handshake Portals, Aderant Drive, and EA Pro+.

[In Person & Virtual]

Track: Information Access

What's New in Reports and Inquiries

Are you up to date on the latest reports and inquiries? In this session we'll review the recently released financial management reports for Inventory, Realizations, Profitability, and Financial Statements. We'll also explore the General Ledger inquiries for Expert Inquiries.

[In Person & Virtual]

Track: Information Access

What's What in Information Access

This session will explore the different tools available to surface Expert & Sierra data; from core reporting and inquiry tools, to business intelligence and analysis, custom dashboards and integrations with other productivity tools.

[In Person & Virtual]

MATTER COMPLIANCE/MANAGEMENT

Track: Matter Compliance/Management

Aderant Conflicts: Streamline While Managing Risk

Learn how Aderant's Conflicts solution can streamline conflicts checks and reduce the risk to your firm.

[In Person & Virtual]

Track: Matter Compliance/Management

Client Compliance Made Easy

See how Aderant can simplify your compliance management process while improving your effective billing rate.

[In Person & Virtual]

Track: Matter Compliance/Management

Effective Legal Project Management Using Expert MatterWorks

Join this session to learn how Expert MatterWorks can help your business track and manage matters by utilizing best practice project management processes for the legal world.

[In Person Only]

Track: Matter Compliance/Management

Expert Case: Improved Collaboration Between the Front & Back Office

Explore Expert Case, a solution that allows for easy collaboration between front and back office users. Expert Case provides a centralized workspace where users can access both pertinent case and matter related information as well as the corresponding financial data, all within efficient, user friendly dashboards. Additionally, learn about the multiple automation options in Expert Case, and increase efficiencies across the firm with our document assembly and Taskflow task automation.

[In Person & Virtual]

Track: Matter Compliance/Management

Manage your Important Entities using Expert Entity Manager

Entity Manager gives you the ability to manage your clients, matters, employees, and other important entities. With mass edit and modeling features, Entity Manager allows firms to efficiently create and update their clients, matters, and employees. In this session we will do a walk through and discuss future roadmap plans for the product.

[In Person Only]

PEOPLE MANAGEMENT

Track: People Management

5 Ways to Utilize Your LMS for Attorney Learning and Development

By taking the plunge and implementing a Learning Management System, law firms can open up new doors of opportunity for their attorneys. Make use of this powerful tool for training, development, and peer learning at your firm, and learn how you can leverage these advantages to overcome any hurdles that may arise, helping all attorneys to reach their full potential!

[Virtual Only]

Track: People Management

How to Develop and Retain Attorneys with the Right Work Opportunities and Feedback

In this session, we will discuss the role that work opportunities and feedback play in the development and retention of attorneys. We will provide practical tips for creating a work environment that supports the growth and well-being of your team. Whether you are a law firm leader, a practice manager, or a HR professional, this session will provide valuable insights and strategies for fostering a culture of professional development and retention within your firm.

[Virtual Only]

Track: People Management

How to Foster Attorney Engagement and Belonging in a Hybrid Work Environment

Learn insights and strategies for overcoming the challenges of sustaining attorney engagement and belonging during hybrid work. From day one when

attorneys are hired, it is essential that your firm has an integration plan that can help attorneys thrive and feel welcome. After the initial integration phase, regular check-ins with partners can provide feedback, coaching and recognition for attorneys and help them build meaningful and lasting working relationships. Gain practical tips for integrating your attorneys successfully and cultivating lasting connections in an inspiring work environment.

[Virtual Only]

Track: People Management

Mastering viEval: How to Use the Software Like a Pro, with Walkthroughs of Key Features and Real-life Client Use Cases

In this session, we will provide a comprehensive training on how to use our performance evaluation software, viEval, like a pro. We'll walk you through the key features of viEval, and show you how other law firms are using it to save time and effort, and improve their performance evaluation processes. You will learn how to set up and use viEval for maximum impact, and how to integrate it into your existing workflow.

[Virtual Only]

Track: People Management

Maximizing Attorney Development with viRTF: A Training on How to Set Up Effective Real-time Feedback Processes for Attorneys

Feeling like your feedback process for attorneys could be better? Learn how to set up effective real-time feedback for attorneys using our software, viRTF. We will discuss common workflows used by law firms to facilitate matter-based feedback, and how firms are using this feedback to enhance their annual performance reviews. We will also provide some best practices in training attorneys to give and receive feedback.

[Virtual Only]

Track: People Management

Operating in an Uncertain Economy: Why Your Firm Needs Better Resource Management, and How To Do It

Operating in an uncertain economy can be challenging for law firms, especially when it comes to resource management. Without a proper process in place, it can be difficult to predict workloads and ensure that your attorneys are not burned out or underutilized. In this session, we will discuss the common challenges in resource management at law firms, and provide practical tips and strategies that can help you make better decisions about your firm's staffing and resources.

[Virtual Only]

Track: People Management

Overview of The vi People Management Platform - What's New and What's Coming

The vi platform addresses the entire people management lifecycle for law firms – from recruiting and onboarding to strategic resource allocation and ongoing learning and performance management.

Join this session to learn about our vision, our technology, and our latest innovations empowering law firms with a more intelligent approach to people management. Plus, you'll get a preview of what's coming in the future.

[Virtual Only]

Track: People Management

Staffing Attorneys on Matters: How to Ensure Profitability While Keeping Clients and Your Team Happy

Staffing attorneys on matters can be a delicate balancing act, especially when it comes to ensuring profitability while keeping clients and team members happy. In this session, we'll cover the challenges and opportunities of properly staffing attorneys on matters, and provide practical tips and strategies for achieving the best possible outcomes.

[Virtual Only]

Track: People Management

The Benefits of Moving Your vi Modules to the Cloud, and How Our Team Can Help You Make This Move

Join us in this session to learn about the advantages of a cloud migration for vi clients, including improved performance, scalability, and security. We will also provide an overview of our implementation process, and show you how other firms have successfully migrated their vi modules to the cloud. Don't miss this session to learn how you can maximize your vi investment and enhance your team's capabilities with cloud migration.

[Virtual Only]

Track: People Management

Unleashing the Power of viRecruit: A Comprehensive Training with Walkthroughs of Key Features and Real-life Client Use Cases

Get ready to unleash the full potential of viRecruit with our training on how to get the most out of its robust features. We will also showcase the latest updates and features in the Wave version, and demonstrate how other law firms are using viRecruit to streamline their processes, save time and effort, and improve their recruitment outcomes.

[Virtual Only]

Track: People Management

viLMS + CLE Training: Best Practices in Using the Software for Maximum Impact, and Latest CLE Rules Updates

Learn how to get the most out of viLMS + CLE with our training on the software's most commonly used features. We will cover how law firms use the software for improved collaboration, learning, and growth for attorneys and staff. Plus, we'll provide updates on the latest CLE rules and requirements, and how to ensure compliance with these rules using viLMS.

[Virtual Only]

TECHNICAL ADMINISTRATION

Track: Technical Administration

Advanced Design Studio

Join to further your knowledge of Design Studio as we cover advanced rules creation and forms customization.

[In Person Only]

Track: Technical Administration

Advanced Expert API's

Expert's RESTful API's provide a multitude of ways to get information into the Expert system. See some of the nuances and real world examples in this advanced API course.

[In Person Only]

Track: Technical Administration

Configuring Expert Monitoring

Learn about configuring and using the Expert Monitoring Database, as well as some hints on querying the tables and understanding logging capabilities.

[In Person Only]

Track: Technical Administration

Creating and Scheduling Jobs in Design Studio

Explore Jobs in Design Studio and understand how to create, schedules, and monitor the jobs.

[In Person & Virtual]

Track: Technical Administration

Effectively Managing Expert Upgrades

Looking to find out how to better manage your Expert upgrades? We'll discuss the upgrade process and testing requirements for your firm, and tips to successfully complete an upgrade.

[In Person & Virtual]

Track: Technical Administration

Expert Database Administration

Gain an understanding of standard management tasks, recommendations, and shadow logging. We will also cover the limits to customizations and naming conventions with Expert Database Administration.

[In Person Only]

Track: Technical Administration

Security Hardening of the Expert Environment

Tips and tricks to harden the Expert environment and make sure you are running in TLS 1.2, and the latest security enhancements.

[In Person Only]

Track: Technical Administration

SQL Server Performance

Insights into SQL Server performance, including examples of Expert support for creating and maintaining filegroups.

[In Person & Virtual]

Track: Technical Administration

Using the Query Service Programmatically

Understanding the Expert Query Service and how to effectively use it for custom integrations

[In Person & Virtual]

Track: Technical Administration

Utilizing Custom Workflows for Simple Tasks

Creating parameter driven workflows and using Expert rules and configuration values to drive simple tasks or perform Expert Actions.

[In Person Only]

THINK TANK

Track: Think Tank

Driving Adoption Through the Right Approach to Training & Change Management

Rollout success starts long before go live day - in this session we'll discuss practical ways to pave a smooth path towards change at your organization as well as techniques to efficiently and effectively train your staff.

[In Person & Virtual]

Track: Think Tank

ESG: Partners for the Future

In our constant journey to be excellent stewards of our clients' trust, Aderant, like many of your firms, officially launched our Environment, Social & Governance (ESG) Steering Committee in 2021. In this discussion-based session, we will share what we have learned and engage in an open conversation about priorities, challenges, ESG goals, and how we can partner on this journey together.

[In Person & Virtual]

Track: Think Tank

Life in the Trenches of the InfoSec Function

In this presentation, we will share with you some useful tips and lessons learned throughout various different information security related experiences. From building a successful training and awareness program to responding to security incidents, this informative session will provide attendees with real world guidance on how the implementation of a structured and ever-evolving security program contributes to overall organizational success and client confidence.

[In Person & Virtual]

Track: Think Tank

Plan to Succeed: Implementation Best Practices

Whether you are rolling out an entirely new practice management system or just updating one or two modules, planning and defined implementation steps are key to success. In this session we will hear from a successful client and discuss best practices you can use as you start the planning process.

[In Person Only]

Track: Think Tank

The Sierra Lift & Shift Experience

What can you expect as you start your Life & Shift journey from Expert to Expert Sierra? This session will provide a review of the process and project to help make your transition smooth.

[In Person & Virtual]

Track: Think Tank

Upgrade Experience in Expert Sierra

This session offers a detailed review of the process for completing upgrades in an Expert Sierra deployment.

[In Person & Virtual]

Track: Think Tank

Why Expert Billing? Explore the Benefits and How to Manage the Classic to Expert Billing Transition Smoothly

Wondering if you should take the time to move from Classic Billing to Expert Billing? Wondering how you'd go about doing it well? Join this discussion to hear proven benefits and tips for a smooth rollout from our experts at Aderant.

[In Person & Virtual]

TIME & EXPENSES

Track: Time & Expenses

A Day in the Life of a Mobile Timekeeper

In today's busy world, timekeepers being able to work on the go is a necessity, not a luxury. Join us as we show you how they can do so with our end-to-end mobile process, from recording time to reviewing bills, and more!

[In Person Only]

Track: Time & Expenses

Automation in Law Firms - Roundtable

Where do you see the future of automation inside a law firm? Join this roundtable to discuss and share your thoughts on how/ where automation can improve firm processes.

[In Person Only]

Track: Time & Expenses

Ensure Accurate Time Capture & Improve Compliance Using the Rules Framework in Expert Time

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

[In Person Only]

Track: Time & Expenses

Expert Time & Expenses Better Together

Using Expert Time & Expenses together is the best way to improve usage and adoption rates, become more efficient, and, in the end, be more profitable. Attend this session to see how similarities in Time and Expenses give firms a quick adoption advantage. Featuring rich, consistent user interfaces for desktop and On The Go applications, condensed training, and availability across the Expert Framework are just a few of the compelling features that give timekeepers and legal assistants a unified experience when using Expert products together.

Join us as we walk you through several examples of just how easy it can be.

[In Person Only]

Track: Time & Expenses

Expert Time Administration

Join this session for a complete overview of the daily processes involved in Expert Time from an administrator's perspective. Best practices, a presentation on ad hoc time reporting, and an explanation of basic troubleshooting tips to make the administrative process easier will all be included.

[In Person Only]

Track: Time & Expenses

Expert Time: What's New Since Version 8.2.2

Let's take a look at all the new features that have been made available throughout 8.2.2 in Expert Time and OTG Time. We'll review usability

improvements, including visual improvements when a user is offline, new Go to Exact Date action, and more.
[In Person & Virtual]

Track: Time & Expenses

Expert's Working Timekeeper Approval Capabilities: Improve Invoicing Accuracy & Minimize eBilling Rejections

Are unapproved timekeepers commonly cited as the source of rejections on invoices submitted to your eBilling vendors and clients? Find out how Expert Advanced Working Timekeeper capabilities can help your firm tackle this challenge with automated notifications using workflow and/or email.
[In Person Only]

Track: Time & Expenses

Hands-On: Expert Time - Your Firm's Unique Time Card

Attend this session to learn how to easily customize your time cards in Expert Time, and see how customizing SmartForms is now easier than ever. We'll demonstrate the most common time card customizations and the upgrade utility, as well as discuss the types of customizations that can be managed through Design Studio.
[Hands On]

Track: Time & Expenses

Hands-On: iTimekeep & Compliant Time Entry

In this workshop session, attendees will experience just how simple time entry can be with iTimekeep (iTimekeep). We'll showcase how iTimekeep helps improve timekeeping behaviors by directing users to provide compliant time entry descriptions, saving billers from going back to correct entries. We'll cover iTimekeep on both desktop and laptop, and within our app built specifically for phones and tablets.
[Hands On]

Track: Time & Expenses

Hands-On: Time Compliance in Expert Time using Rules

This hands-on session will allow attendees to gain an understanding of how Expert Time utilizes the Rules Framework including firms rules, matter rules, and outside council guideline rules. We'll walk through several 'out of the box' rules as well as how to set up and configure custom rules to meet unique firm requirements.
[Hands On]

Track: Time & Expenses

Simplify Compliant Time Entry

Discover why iTimekeep is ranked as the #1 mobile time entry tool for law firms, year after year. Attendees will learn how iTimekeep guides users to compliant time entry, saving their firm's bottom line from write-offs and appeals!
[In Person & Virtual]

*Momentum 2023 Session Schedule is subject to change.

