



Conference Agenda

2014 User Conference, Stone Mountain – Atlanta, GA

Track 1	Financial Management
Track 2	Practice Management
Track 3	Firm Management

MONDAY, October 20, 2014

7:30 a m – 8:45 a m	Registration & Breakfast (Outside Rotunda Meeting Room)	
8:45 a m – 9:00 a m	Opening Ceremonies (Welcome & Introduction of Orion Staff)	
9:00 a m – 9:45 a m	Keynote Address – Navigating the Next Decade, Ari Kaplan, Ari Kaplan Advisors LLC	
9:45 a m – 10:30 a m	Orion 4.6 & What's New, Paul Yelton, Kevin Harris & Cindy Shirley, Orion	
10:30 a m – 10:45 a m	Morning Short Break	
10:45 a m – 11:45 a m	Orion Reporting Options - Getting the Most Out of Orion, Cindy Shirley, Orion	
12:00 p m – 1:00 p m	Lunch Break	
1:15 p m – 2:00 p m	Orion's *NEW* GL Financial Statement Wizard, Cindy Shirley, Orion	
2:15 p m – 3:00 p m	Orion's Report Builder	AR Collection Techniques Using Orion 4.6
3:00 p m – 3:15 p m	Afternoon Short Break	
3:15 p m – 4:00 p m	Developing Invoice Styles & Email Templates	Essential Functions of Orion
4:15 p m – 5:00 p m	Ask the Experts, Orion Staff	
6:00 p m – 8:00 p m	Dinner – Tribute to the South (Lakefront Deck)	

TUESDAY, October 21, 2014

7:30 a m – 8:45 a m	Breakfast (Outside Rotunda Meeting Room)	
9:00 a m – 10:00 a m	Orion Visual Analytics - Business Intelligence for Law Firms, Carl A. Mack , CEO IntelliMetrics LLC	
10:00 a m – 10:30 a m	Help Us (Attorneys) Help You, Walter Romney, Partner, Clyde Snow & William Dunaway, Partner, CPHLB&S	
10:30 a m – 10:45 a m	Morning Short Break	
10:45 a m – 11:45 a m	No Firm Left Behind – Top 10 Financial Mistakes to Avoid, Michael R. Marget, CEO, 4L Law Firm Services	
12:00 p m – 1:00 p m	Lunch Break	
1:15 p m – 2:00 p m	AP Imaging/Expense Reimbursement Manager FAQ's, Kevin Harris & Cindy Shirley, Orion	
2:15 p m – 3:00 p m	Managing Trust & Staying in Compliance	Law Firm Marketing Techniques Using Orion
3:00 p m – 3:15 p m	Afternoon Short Break	
3:15 p m – 4:00 p m	Reporting – The Power of Grids	Maximize Orion – Custom Tables, Views & Reports
4:15 p m – 5:00 p m	iPad for Lawyers, Steven J. Best, Esq., Partner, Affinity Consulting Group	
6:00 p m – 8:00 p m	Enjoy the Sites of Stone Mountain!	

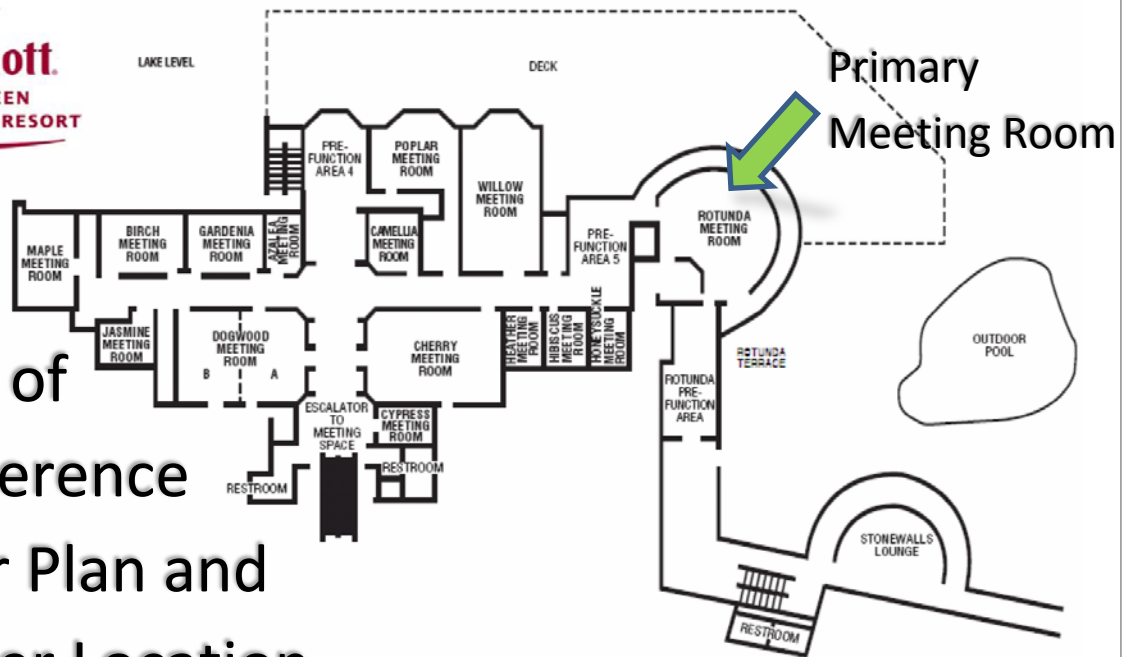


WEDNESDAY, October 22, 2014

7:30 a m – 8:45 a m	Breakfast (Outside Rotunda Meeting Room)	
9:00 a m – 9:45 a m	Understanding Process Mapping, Debbie Foster, Partner, Affinity Consulting Group	
10:00 a m – 10:45 a m	Orion Accounting Basics	Maximize Orion – Expand Orion’s Document Library
10:45 a m – 11:00 a m	Morning Short Break	
11:00 a m – 11:45 a m	Closing Ceremonies & Conference Wrap-Up	
12:00 p m – 1:00 p m	Lunch Break	



Map of Conference Floor Plan and Center Location





2014 ORION USER CONFERENCE SESSION GUIDE

2014 Orion User Conference
Participate. Integrate. Elevate.

October 20-22, 2014

Marriott Evergreen Resort Stone Mountain, Georgia



ORION SESSIONS

MONDAY, OCTOBER 20, 2014

Welcome & Introductions

8:45 AM – 9:00 AM

Paul Yelton, President Orion Law Management Systems, Inc.

Welcome! As many of you know, the focus of the Orion User's Conference is on education. Most of the sessions have been designed to assist you in using the Orion software to its fullest potential and offer tips on improving your firm's procedures. This year is no different. Sit back and relax, learn, interact with our staff and your peers and above all, have fun.

Rotunda Meeting Room

**Keynote Address – Recovery, Renewal & Reinvention:
Navigating the Next Decade**

9:00 AM – 9:45 AM

Ari Kaplan, Ari Kaplan Advisors, LLC

Driven by the dramatic shift in the manner in which professionals practice, value their effort, and deliver their services, there is a new model of creating opportunity, rather than simply making rain, that will propel each profession forward. It is a culture supported by collaborative tools, a flatter global landscape and an increasingly rapid pace of expert analysis. This program guides participants through the catalysts for the change and the techniques they can use to reinvent their profiles in the recovery.

Rotunda Meeting Room

Orion 4.6 & What's New

9:45 AM – 10:30 AM

Orion Staff

Did you know that we've made nearly 800 enhancements/changes to Orion since our last User Conference? In addition, we've released several new features such as iOrion, Reimbursement Management, Credit Card Processing by PayPros®, while taking time to significantly enhance Orion's A/R Collection Manager and A/P Imaging solutions. We'll review each of these as well as to provide you with insight as to what the future holds with Orion. You won't want to miss this session.

Rotunda Meeting Room



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ORION SESSIONS

MONDAY, OCTOBER 20, 2014

Orion Reporting Options – Getting the Most Out of Orion

10:45 AM – 11:45 AM

Cindy Shirley, Vice President, Orion Law Management Systems, Inc.

Reporting has become one of their biggest software challenges for law firms. This challenge is no different for Orion users. In this session we will provide you with a general overview of the many tools and techniques that are available with your Orion software. Learn how to identify what you need and determine the best tools and methods to employ.

Attendees who would like more detailed information on this subject can follow up by attending one of the Breakout sessions on “Orion’s Report Builder”, “Reporting – The Power of Grids” and “Developing Invoice Styles & Email Templates”.

Rotunda Meeting Room

Orion’s New GL Financial Statement Wizard

1:15 PM – 2:00 PM

Cindy Shirley, Vice President, Orion Law Management Systems, Inc.

Orion’s new GL Live Financials Module gives you the ability to design Financial Statement Styles that can be distributed on-line as well as in printed form. Designed as a user-friendly report designer, GL Live Financials makes it very easy to create your financial statements, add accounts, change values you want displayed, distribute reports to individuals and secure each individual report style. The module also provides the ability to create a Cash Flow Statement.

Rotunda Meeting Room



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ORION SESSIONS

MONDAY, OCTOBER 20, 2014

Breakout Session I: Orion's Report Builder

2:15 PM – 3:00 PM

Cindy Shirley, Vice President, Orion Law Management Systems, Inc.

This session is a follow-up to the "**Orion Reporting Options – Getting the Most Out of Orion**" session and is designed to provide you with more in-depth information and specific examples of editing reports using Orion's report writer and other tools for data mining and reporting out of Orion. Several topics within this class will assume a general understanding of the Orion Reporting System and the Orion report writer.

Rotunda Meeting Room

Breakout Session II: AR Collection Techniques Using Orion

2:15 PM – 3:00 PM

Kevin Harris, Project Manager, Orion Law Management Systems, Inc.

You probably already know that Orion can be used to generate past due reports and send reminder notices. But did you also know that Orion can be used to generate letters, follow-up ticklers and payment status updates? This session provides a practical guide to using the Orion software to effectively monitor and manage your accounts receivable collections. We'll also review the enhancements offered in Orion 4.6.

Cherry Meeting Room

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ORION SESSIONS

MONDAY, OCTOBER 20, 2014

Breakout Session I: Developing Invoice Styles & Email Templates

2:15 PM – 3:00 PM

Kevin Harris, Project Manager & Cindy Shirley, Vice President, Orion Law Management Systems, Inc.

This session is a follow-up to the “**Orion Reporting Options – Getting the Most Out of Orion**” session and is designed to provide you with more in-depth information and specific examples of creating and editing invoice styles and email templates (for Email Bill Delivery and AR Collections) using Orion’s report writer and email template manager. Several topics within this class will assume a general understanding of the Orion report writer.

Rotunda Meeting Room

Breakout Session II: Essential Functions of Orion

2:15 PM – 3:00 PM

William J. Dunaway, Shareholder, Clark, Partington, Hart, Larry, Bond & Stackhouse

This breakout session focuses on what functions of Orion that all attorneys should know and be using most often. This would be akin to a “60 Apps in 60 Minutes” presentation that many of you have attended at either an ALA, ALM or ABA conference, but focused on the features of Orion. It’s a fast-paced session geared toward educating you on the features of Orion that everyone should know about.

Cherry Meeting Room

Ask the Experts

4:15 PM – 5:00 PM

Orion Staff

“I didn’t know Orion could do that”! We hear it all the time. What can we do to make your job easier? Join the experts for short demonstrations of several time savers and software tricks. We guarantee that you’ll see lots of time savers and interesting new ways to use your software. Have a tip or trick to share? Let us know. A great prize could be in your future!

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ORION SESSIONS

TUESDAY, OCTOBER 21, 2014

Orion Visual Analytics – Business Intelligence for Law Firms

9:00 AM – 10:00 AM

Carl A. Mack, CEO, IntelliMetrics LLC

Just a few weeks back many of you were introduced to Orion Visual Analytics through a very well attended Webinar hosted by Orion. If you missed the Webinar, you're probably asking "what is Orion Visual Analytics (or OVA for short)?"

The Orion Visual Analytics platform provides Users easy-to-understand, concise insight into complex business questions. Orion Visual Analytics will give your Firm quick access to financial performance information at a variety of levels including; Firm Level, Location, Practice Group, Department and Attorney Level Client/Matter level. Monitoring the financial performance of your law firm is critical and a crucial component in effectively communicating to the firm's financial status to management. Creating a Monthly Financial Package is a key element. This session will provide insight into the primary items that should be included, why it should be evaluated and how it should be presented.

Rotunda Meeting Room

Help Us (Attorneys) Help You

10:00 AM – 10:30 AM

Walter A. Romney, Jr., Partner, Clyde Snow

William J. Dunaway, Shareholder, Clark, Partington, Hart, Larry, Bond & Stackhouse

During this session, we'll focus on what the managing partner needs from the accounting staff... and what can be done to help make attorneys more productive and able to find information on their own. Gain insight from two attorney's perspective as to what they find important and how, with at least two attorneys, they've found themselves at-ease locating this information on their own!

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ORION SESSIONS

TUESDAY, OCTOBER 21, 2014

No Firm Left Behind – Top 10 Financial Mistakes to Avoid

10:45 AM – 11:45 AM

Michael R. Marget, CEO, 4L Law Firm Services

It's a great time to be a law firm manager – if you're into problem-solving and like a good challenge. Creatures of precedent, firms tend to recycle the same old business plans and repeat the same management missteps year-after-year. Mike has distilled these challenges into a Top 10 List of persistent practices holding back firms from meeting their long-term financial goals. Over the course of a fast-paced general session, Mike will offer practical advice to help law firm managers identify these management missteps and suggest methods for addressing them in your firm.

Rotunda Meeting Room

A/P Imaging & Expense Reimbursement FAQ's

1:15 PM – 2:00 PM

Kevin Harris, Project Manager & Cindy Shirley, Vice President, Orion Law Management Systems, Inc.

Today's law firms depend on automation and tightly integrated software solutions to improve workflow between attorneys, legal staff and the accounting department, freeing-up the accounting staff for more critical business needs. Managing paper-based copies of vendor invoices, reimbursement requests and associated receipts is not only time-consuming but can be highly expensive when considering the costs associated with storage. In this session, we'll discuss how A/P Imaging and Expense Reimbursement are designed to eliminate the need to store physical copies while creating a workflow that improves efficiencies for the front office as well as the back office.

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ORION SESSIONS

TUESDAY, OCTOBER 21, 2014

Breakout Session I: Managing Trust & Staying in Compliance

2:15 PM – 3:00 PM

Michael R. Marget, CEO, 4L Law Firm Services

This Client Trust Accounting Session is designed for law firm managers whose job includes assisting lawyers in meeting their legal and ethical responsibilities whenever money or other property is held in trust. It is imperative that law firm managers thoroughly understand the client trust accounting rules and the obligations imposed upon the lawyers - whose license may be at risk if those rules are not followed. This breakout session will focus on basic client accounting trust procedures and recordkeeping requirements generally applicable in every jurisdiction.

Rotunda Meeting Room

Breakout Session II: Law Firm Marketing Techniques

2:15 PM – 3:00 PM

Kevin Harris, Project Manager, Orion Law Management Systems, Inc.

There are many aspects of law firm marketing: Contacts/Relationships, “Holiday Card” lists, tracking referral sources, newsletter distribution, task/appointment scheduling, follow up alerts. Orion can help you manage your marketing efforts. Learn how to use Orion for effective law firm marketing. This will include proven techniques for gathering the critical information and using that information to effectively communicate with current and potential clients.

Cherry Meeting Room

Breakout Session I: Reporting – The Power of Grids

3:15 PM – 4:00 PM

Paul Yelton, President, Orion Law Management Systems, Inc.

This session is a follow-up to the “Orion Reporting Options – Getting the Most Out of Orion” session and is designed to provide you with more in-depth information and specific examples of creating and using various “manager” views in Orion to generate reports.

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ORION SESSIONS

TUESDAY, OCTOBER 21, 2014

Breakout Session II: Maximize Orion – Custom Tables, Views & Reports 3:15 PM – 4:00 PM

Kevin Harris, Project Manager, Orion Law Management Systems, Inc.

Did you know that you can configure Orion to track and report on almost anything? During this session you will learn how you can use Orion to create custom screens, tabs and views so that you can enter, monitor, query, export and report virtually any kind of information related to your Contacts, Clients and Matters. Several topics within this class will assume a general understanding of databases.

Cherry Meeting Room

iPad for Lawyers

4:15 PM – 5:00 PM

Steven J. Best, Esq., Partner, Affinity Consulting Group

This session will highlight the coolest iPad tips, tricks and apps to improve productivity and enhance customization on your iPad. Steve shows you how to make your iPhone/iPad work best for you. Learn the best options for documents and data storage, accessibility options, encryption, scanner apps, office productivity options, trial/research apps, and etc.

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ORION SESSIONS

WEDNESDAY, OCTOBER 22, 2014

Understanding Process Mapping

9:00 AM – 9:45 AM

Debbie Foster, Partner, Affinity Consulting Group

“How do we do what we do?” It’s an important but daunting question. When it comes to mapping out the processes we follow, we know we should but it seems to be too large of an undertaking. This session will show you practical tools and techniques to get your processes documented in a manageable way. We’ll also talk about the value of taking the time to document processes for your teams and keeping them current.

Rotunda Meeting Room

Breakout Session I: Orion Accounting Basics

10:00 AM – 10:45 AM

Cindy Shirley, Vice President, Orion Law Management Systems, Inc.

Do you need a refresher on General Ledger basics? This session helps you understand how Orion processes bills, receipts and checks and tracks their flow through the various programs and how it update the General Ledger. There will also be a general discussion on basic financials statements and reconciliation techniques.

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ORION SESSIONS

WEDNESDAY, OCTOBER 22, 2014

**Breakout Session II: Maximize Orion – Expand Orion’s
Document Library**

10:00 AM – 10:45 AM

Jon D. Yelton, Consulting Services, Orion Law Managements Systems, Inc.

Law firms seem like they are built on the documents they produce: Engagement letters, contracts, pleadings, mailing labels. Did you know that Orion’s document assembly can help you accomplish these tasks and perform many, many other functions? This session will teach you the basics of document assembly and provide a primer on how to create custom templates and manage your document library.

Juniper Meeting Room (*note: this is a different location from previous breakout sessions*)

