



Steere BudgetManager

Overview

BudgetManager© is an effective business tool for streamlining the creation of matter budgets, tracking budget to actuals (fees and disbursements), profitability, alerts, data warehousing time history, predictive coding, and managing projects. BudgetManager© is fully integrated with Aderant and Elite (Enterprise and 3E).

Budgeting

Simple to complex budgets. Budget with or without phases and tasks. Alternative fee arrangements, versioning, budget-to-actuals, templates, Gantt charts, milestones, and alerts are some key BudgetManager© features.

Scenarios

Scenarios are a series of quick questions a user answers when creating a budget. Scenarios can calculate a budget and capture data that can be later mined for information. It allows the firm to refine the budget with minimal input from the attorneys.

Legal Project Management (LPM)

Create and monitor milestones to be completed for a budget. Each milestone may be assigned to an individual with a deadline date. A status may be assigned along with a % complete based on hours or % of task, begin date and completion date.

Reporting

BudgetManager© has a diverse variety of standard budget to actuals reports. The 19 standard reports are built in SSRS and can be customized by, or for, the firm. Some of the reports are Dashboard, Attorney, Client Status, Allocations, Attorney, Gantt, Compare Budgets, Line Chart, etc.

Allocations

Allocations show where you are against the budget to-date, not just the full budget. Budget across periods of time to determine when various tasks might be billed. Periods may be weeks, months, quarters, semiannually, annually or life-to-date.

Features

- Attorney Viewer
- Wide array of Alternative Fee Arrangements: Fixed Fee, Blended, Collar, Fee Cap, Volume, etc.
- Tight Aderant and Elite Integration
- Types of Budgets: Summary, Quick, Phase Tasks, Import, Allocation, Parent, Top Down, Leverage and Research
- Future rates
- Versioning
- Templates
- Profitability
- Alerts
- Scenarios
- Disbursement Support
- Legal Project Management (LPM)
- Predictive Modeling
- Expandable Reporting (SSRS)
- Integration with EIS, Aderant Bill Formats, PrebillManager, AlertManager

Pricing Analytics

Pricing Analytics allows you to data mine time entries from your time and billing system into BudgetManager© for sophisticated data analysis. The data warehouse or data mining feature allows you to copy time entries into warehouse tables within BudgetManager© and quickly scrub and massage this data for accurate analysis.

Features

- Quick and easy time entry imports
- Narrative indexing
- Easy linking of matters, clients, or parent clients
- Advanced, efficient narrative searching
- Block billing processing
- Narrative updates
- Staffing level updates
- Multi-tasking
- Custom scrub routines
- Warehousing with key metrics
- Phase task coding not on original time entry
- Create Budget from Warehouse
- Compare up to 10 Warehouses for analysis
- Compare Budget to Warehouses