

Karpel Solutions National User Group Agenda April 8 – 10, 2025

Tue. AM	Versailles 1&2 General Sessions	Matterhorn- Templates Track	Versailles 2- Attorney Track	St. Moritz/Bern- Report Track
7:30-8:30	Registration- Versailles Foyer			
8:30 – 9:00	Welcome– With Jeff Karpel Meet the trainers and learn more about their skill sets along with an update on the Karpel Foundation and the projects that have been awarded.			
9:00-10:30	2025 Tips and Tricks <i>With Pippa Barrett and LeeAnn Karpel</i> Features in PbK and DbK that can save you Time and Effort!			
10:30-10:45	Break			
10:45-11:30	State Breakout Gather with your peers and discuss unique challenges within your state with a trainer.			
11:30 -Noon	What Do You Want to Learn This Week? <i>Moderator Jeff Karpel and LeeAnn Karpel</i> Interactive session for you to share your challenges and what you hope to learn this week.			
Tue. PM	Lunch on your own			
1:30 – 2:25	Victim Engagement Platform <i>With Mike Stendebach</i> Join Mike Stendebach as he showcases the new Victim Engagement Platform (VEP) and dive into the NEW possibilities to streamline Victim Services and Victim Notifications.	Templates 101 <i>With Heather Blank</i> *Laptop Required Learn approaches to create basic templates and data source utilization. You will learn to a motion.	Best Courtroom Practices for Prosecution and Defense <i>(Panel) With Christian Bahn and Erin Crouch</i>	Improve Data Integrity <i>With Tyler Ingham, Ezekiel Kaufman</i> We will discuss the ever growing Data Integrity Report. It's a free report that your office can request to help you find and clean up bad data and orphaned, duplicate and missing information.

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2:30-3:30	External Agency Portal- Setting Up for Success <i>With Kelly Camilleri, Joe Wright</i> Learn how to set up and implement the LE Portal for better communication with your Law Enforcement partners.	Templates -Charging and Victim Templates <i>With Heather Blank</i> <i>*Laptop Required. Must have prior document template knowledge.</i> Learn how to construct a charging document, subpoena, and a victim letter.	DbK and the new Client Engagement Platform <i>With Randy Knopf</i> Learn more about DbK's functionality including a demonstration of the new Client Engagement Platform to better communicate with clients.	What Canned Reports Can Do For You - <i>With Tyler Ingham, Ezekiel Kaufman</i> We'll show you the best approach using canned reports to answer internal and external questions along with a new report, Cases Handled, using visualization techniques to show volume of work handled year after year.
3:30 – 3:45	Break			
3:45- 4:45	Grand Jury Scheduler <i>With Joe Wright</i> Learn how to set up and implement the Grand Jury Scheduler.	Templates – Civil Templates <i>With Heather Blank</i> <i>*Laptop Required</i> Review and understand how civil templates work, and how to effectively design and produce various civil templates.	Not Just For Criminal Cases, PbK is for Civil Too! <i>With Kelly Camilleri, Erin Crouch</i> Are you laboring under the yoke of civil cases? Do you thrash about trying to work a civil case? Fear not! Let Erin and Kelly help you fight those fears, so you no longer have to toil under the burden of your civil cases.	Reports Lab <i>With Tyler Ingham, Ezekiel Kaufman</i> Open lab with Tyler and Ezekiel to answer questions and troubleshoot existing reports.
6:00 -8:00	Welcome Reception- Patio/Zurich Ballroom (lower level)			

Alpine 1 & 2 (lobby level). 1:30 – 4:45 PM. Open Lab including Template Lab. Take advantage of our lab option throughout the entire conference. Meet with Scott Crause and members from our help desk for some one-on-one assistance with an issue, or “how to” instructions on any subject.

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Wed. AM	Versailles 1- General Session	Matterhorn- Templates Track	Versailles 2- Attorney Track	St. Moritz/Bern- Report Track
7:30-8:30	Breakfast- Zurich (lower level)			
8:30 – 9:30	Case Page Templates <i>With Pippa Barrett</i> Learn how to customize pages in PbK and DbK to work for your particular office.	Templates 101 <i>With Heather Blank</i> <i>*Laptop Required</i> Learn approaches to create basic templates and data source utilization. You will learn to a motion.	DbK Roundtable <i>With Randy Knopf</i> Join Randy for a discussion focusing on how your office leverages DbK that might benefit others, expanding DbK centric reporting and better use of automated notifications to clients and witnesses.	What Canned Reports Can Do For You - <i>With Tyler Ingham, Ezekiel Kaufman</i> We'll show you the best approach using canned reports to answer internal and external questions along with a new report, Cases Handled, using visualization techniques to show volume of work handled year after year.
9:35-10:35	Media Management <i>With LeeAnn Karpel</i> Learn how to play different media types, use automatic transcription, redact faces, and more with PbK and DbK built-in audio and video streaming and editing tools.	Templates Charging/Victim Templates <i>With Heather Blank</i> <i>* Laptop Required. Must have prior document template knowledge.</i> Learn how to construct a charging document, subpoena, and a victim letter.	DbK- Calendaring, communicating, reducing FTA <i>With Randy Knopf</i> Learn how to use Outlook effectively to calendar court dates and appointments and how to reduce FTAs by texting clients upcoming court dates along with using Setting Control and the Court Face Sheet in the courtroom.	Improve Data Integrity <i>With Tyler Ingham, Ezekiel Kaufman</i> We will discuss the ever growing Data Integrity Report. It's a free report that your office can request to help you find and clean up bad data and orphaned, duplicate and missing information.
10:35-10:50	Break		Versailles 2-General Sessions	
10:50 -11:50	My View-How to Customize <i>With Pippa Barrett</i> Learn how to customize My View to suit users' particular needs, and how to use My View to manage cases from referral to disposition.	Templates Tips and Tricks <i>With Heather Blank,</i> <i>* Laptop Required. Must have prior document template knowledge.</i> Learn about Event Questions, Bookmarks, IF statements and other cool Tips and Tricks I have gathered from coding documents for 6+ years.	External Agency Portal-Setting Up for Success <i>With Kelly Camilleri, Joe Wright</i> Learn how to set up and implement the LE Portal for better communication with your Law Enforcement partners.	Reports Lab <i>With Tyler Ingham, Ezekiel Kaufman</i> Open lab with Tyler and Ezekiel to answer questions and troubleshoot existing reports.
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2:30-3:30	Obscure features of PbK/DbK <i>With Krista Boston, Kelly Camilleri</i> This session will introduce obscure features that you may not know about in PbK/DbK.	Templates Tips and Tricks <i>With Heather Blank</i> * Laptop Required. Must have prior document template knowledge. Learn about Event Questions, Bookmarks, IF statements and other cool Tips and Tricks I have gathered from coding documents for 6+ years.	My View -How to Customize <i>With Pippa Barrett</i> Learn how to customize My View to suit users' particular needs, and how to use My View to manage cases from referral to disposition.	Reports Lab <i>With Tyler Ingham, Ezekiel Kaufman</i> Open lab with Tyler and Ezekiel to answer questions and troubleshoot existing reports.
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6:00 -9:00	Westport Social			

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Thur. AM	Versailles 1&2- General Sessions			
7:30-8:30	Breakfast- Zurich (lower level)			
8:30 – 9:30	Introduction to 7.5 <i>With LeeAnn Karpel</i>			
10:30-10:45	Break			
10:45 -Noon	What Did You Learn and What Are You Going to Do About It? <i>Moderator Jeff Karpel</i> Tell us what you learned and how you plan to utilize it in your office.			
End				

Alpine 1 & 2 (lobby level)- Open Lab from 8:30 AM – 2:00PM.

LOBBY LEVEL



