DocuDraft

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OVERVIEW

DocuDraft allows you to create any number of prebill, bill, cover letter, reminder statement, and collection letter formats using virtually all information that is available in your firm's database.

Using two components—a word processor and the **DocuDraft** language—you have complete control over the formatting and presentation of your firm's prebills and bills. The word processor is your canvas, **DocuDraft** is your paint, and you are the artist.

In order to become a brilliant artist you must be familiar with your word processor, your firm's formats, and the **DocuDraft** language.

TRAINING OBJECTIVES

During this training session you will learn how to:

1. How to set up the **DocuDraft Paths**
2. How **DocuDraft** works in **Billing**
3. How to find and maintain prebill and bill files created by **DocuDraft**
4. How to create a **DocuDraft** template
5. How to document and maintain your **DocuDraft** templates
6. How to use **DocuDraft** variables
7. How to use **DocuDraft** functions
8. How to use proper syntax with **DocuDraft** functions
9. How to use **DocuDraft** commands
10. How to run a **DocuDraft** template in **Billing**
11. How to breakdown a **DocuDraft** template in various sections
12. How to create a header section
13. How to create a time detail section
14. How to create a timekeeper summary section
15. How to create a disbursement detail section
16. How to create a disbursement summary section
17. How to create other various sections of your template

WHAT IS DOCUDRAFT?

DocuDraft is a document assembly product that brings together the templates you create in your word processor and the information from your database. It all starts with a document, called a "template".

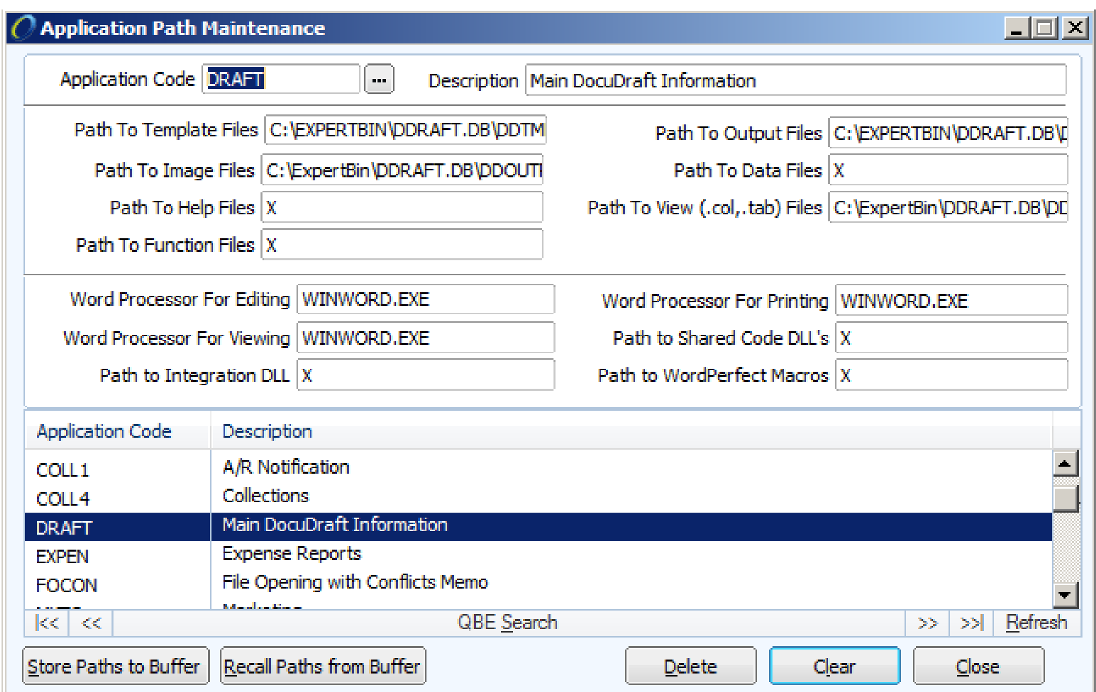
DocuDraft works directly with your word processor and contains a full set of commands and functions that provide you with the functionality required to automate all of your documents including:

- Variables - What is a database variable, a user defined variable, a system variable?
- Operators - Mathematical, text, date, boolean, and logical operators.
- Screen Formatting Codes - For entering hard returns, hard page breaks, hard spaces, indents, and hyphens.
- Commands - Such as IF, REPEAT DRAFT, and SET.
- Clauses - Such as WHERE, AGGREGATES, GROUP BY, and ORDER BY.
- Functions - For formatting variables; such as COMMA, DATE_TO_TEXT, COUNT, and ASK.

ACCESSING DOCUDRAFT PATHS

DocuDraft Paths are used to point to your templates. To access or modify these:

1. From the AppShell, select **Customization and DocuDraft | DocuDraft | DocuDraft Paths**.
2. Click on the **Refresh** Button in the QBE listbox (directly above the **Close** button). A list of all the application codes should appear. Highlight the **DRAFT** application code.



CHECK OUT THE FOLLOWING APPLICATION CODES:

- **DRAFT** - sets the paths for the DocuDraft Toolkit (make sure the "path to view is pointing to the DDVIEW folder).
- **BILL** – sets the paths for the bills (review the path to template and path to output).

BILL FORMATS

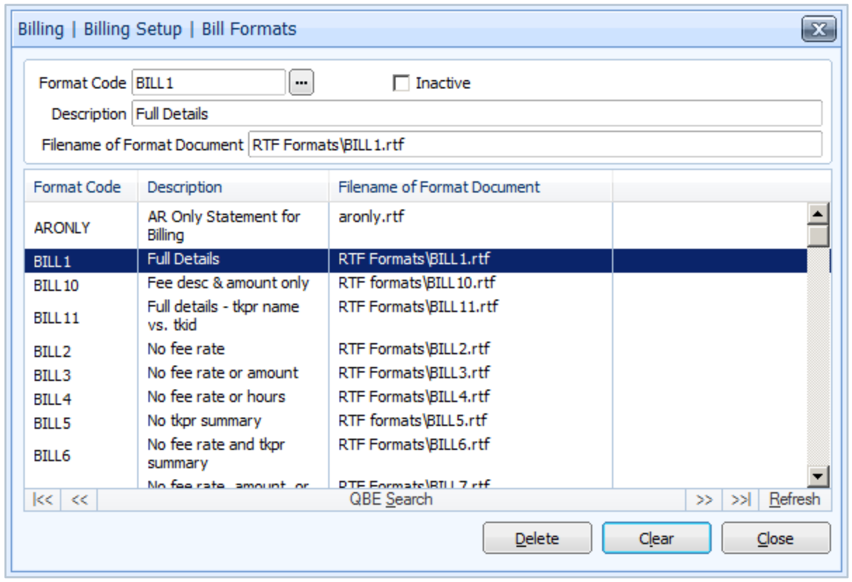
WHICH TEMPLATE IS ASSIGNED TO A BILL

There are three areas where a template (bill format) is associated to a bill:

1. System Level
2. Matter Level (using Bill Groups)
3. Billing Desktop Level (at run time)

CREATE A BILL FORMAT CODE

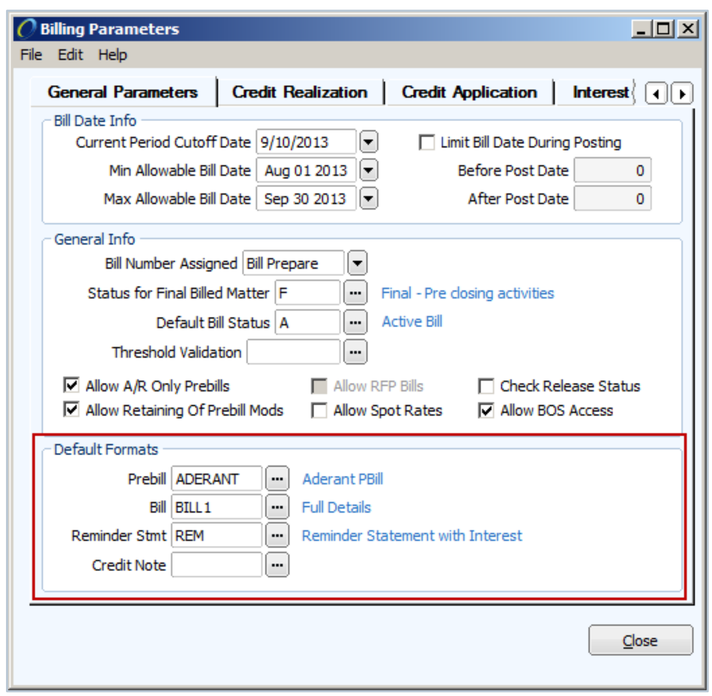
1. From the AppShell, select **Billing | Billing Setup | Bill Format.**
2. Enter a **Format Code** (up to 10 digits).
3. Enter a **Description.**
4. Enter the **Filename** of the template**.**
5. Click **OK.**



ASSIGNING A TEMPLATE AT THE SYSTEM LEVEL

This is done in the **Billing Parameters.**

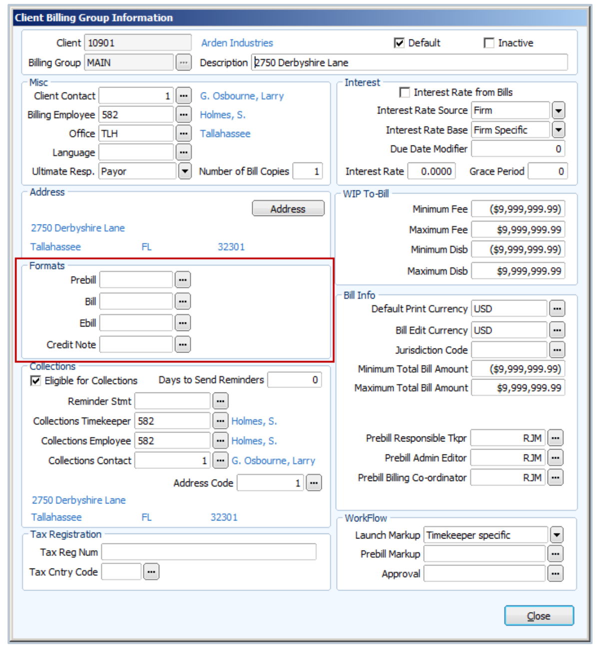
1. From the AppShell, select **Billing | Billing Setup | Billing Parameters | General Parameters**.
2. Enter a bill format code in the **Bill** field. You may also add system level defaults for a **Prebill**, **Reminder Statement**, and **Credit Note**.



ASSIGNING A TEMPLATE AT THE MATTER LEVEL

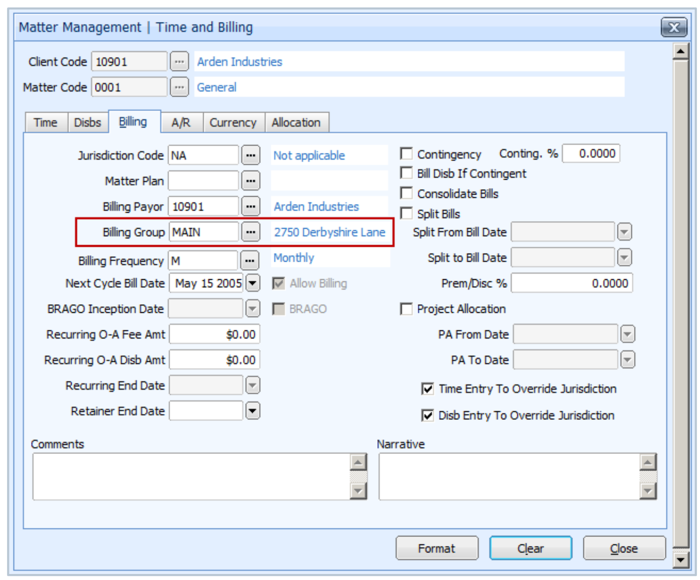
You will assign the format code to the bill group and then attach the bill group to a matter.

Assign a Format to the Bill Group



1. From the AppShell, select **Client Management** | **Bill Groups.**
2. Highlight the bill group and click **Modify**.
3. Enter the **Bill** format code. You may also assign formats for **Prebill**, **Ebill** and **Credit Note**.

Assign a Bill Group to a Matter

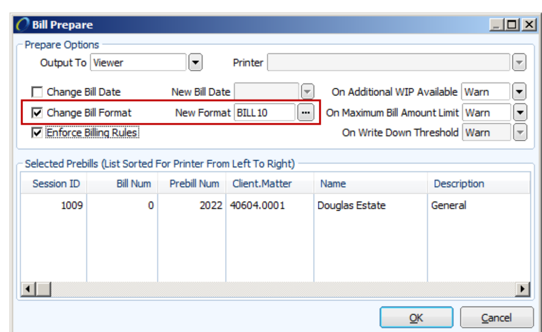


1. Go to **Matter Management** | **Time & Billing** | **Billing** tab.
2. Enter the **Billing Group** code.

ASSIGNING A TEMPLATE AT THE BILLING DESKTOP

This takes place at the time of billing and will override the matter level template.

1. From the AppShell, select **Billing.**
2. Find a prebill.
3. Go to **Actions** | **Prepare Bill**.
4. Check **Change Bill Format** and enter a bill format code in the **New Format** field.



BUILDING BLOCKS OF A TEMPLATE

A template is word processing document containing **DocuDraft** instructions.

DocuDraft instructions are enclosed in braces { }.

Examples:

{bill_date}	January 15, 2000
{ REPEAT matter_info }	Read all of the matter records
{p_bill_fees + p_bill_disb}	Add two numbers

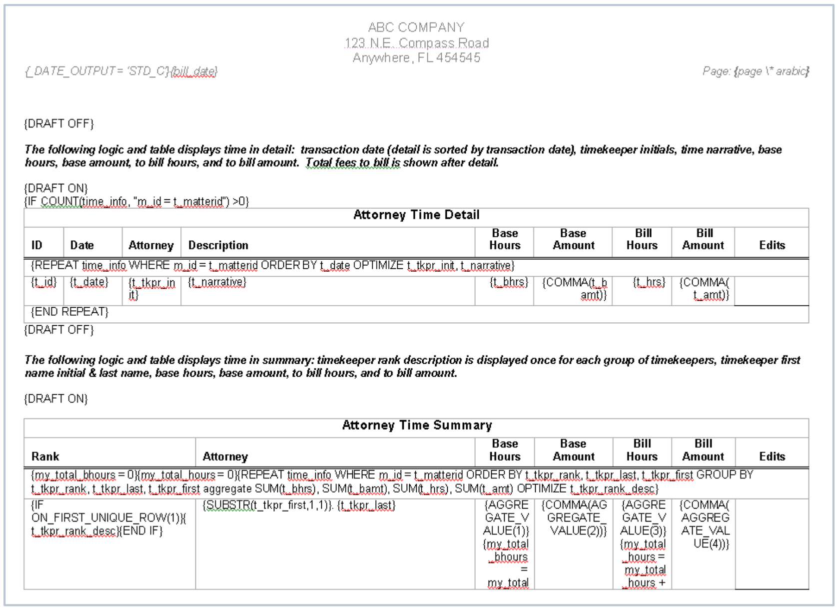
Instructions are Comprised of Variables, Commands and Functions

- **Variables** – created in the DocuDraft toolkit based on columns or calculations.
- **Commands** - are DocuDraft instructions to read or extract data from the database. For example {REPEAT matter_info} will list all matters on the bill.
- **Functions** - are DocuDraft instructions that manipulate data. EXAMPLE: {UPPER(M_NAME)}

TWO TYPES OF TEMPLATES

All in one

All sections (i.e. time detail, disbursement summary) are on one template. This is usually how a prebill is constructed.



ABC COMPANY
123 N.E. Compass Road
Anywhere, FL 454545

{_DATE_OUTPUT= 'STD_C'}{bill_date} *Page: {page * arabic}*

{DRAFT OFF}

The following logic and table displays time in detail: transaction date (detail is sorted by transaction date), timekeeper initials, time narrative, base hours, base amount, to bill hours, and to bill amount. Total fees to bill is shown after detail.

{DRAFT ON}
{IF COUNT(time_info, "m_id = t_matterid") >0}

Attorney Time Detail

ID	Date	Attorney	Description	Base Hours	Base Amount	Bill Hours	Bill Amount	Edits
{REPEAT time_info WHERE m_id = t_matterid ORDER BY t_date OPTIMIZE t_tkpr_init, t_narrative}								
{t_id}	{t_date}	{t_tkpr_init}	{t_narrative}	{t_bhrs}	{COMMA(t_bamt)}	{t_hrs}	{COMMA(t_amt)}	
{END REPEAT}								

{DRAFT OFF}

The following logic and table displays time in summary: timekeeper rank description is displayed once for each group of timekeepers, timekeeper first name initial & last name, base hours, base amount, to bill hours, and to bill amount.

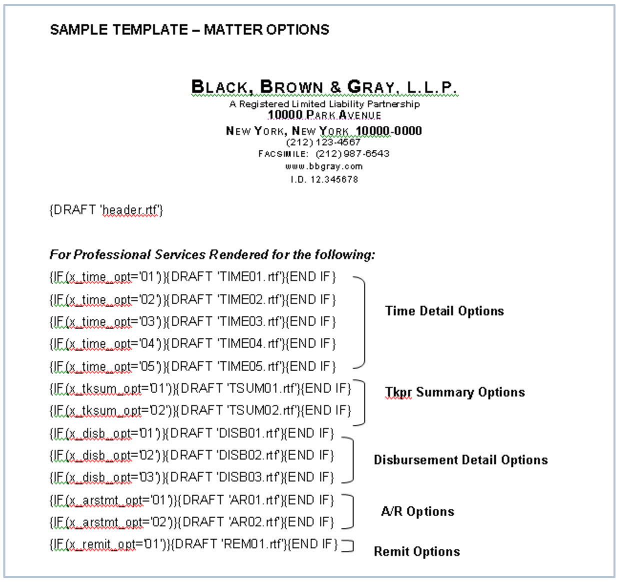
{DRAFT ON}

Attorney Time Summary

Rank	Attorney	Base Hours	Base Amount	Bill Hours	Bill Amount	Edits
{my_total_bhours = 0}{my_total_hours = 0}{REPEAT time_info WHERE m_id = t_matterid ORDER BY t_tkpr_rank, t_tkpr_last, t_tkpr_first GROUP BY t_tkpr_rank, t_tkpr_last, t_tkpr_first aggregate SUM(t_bhrs), SUM(t_bamt), SUM(t_hrs), SUM(t_amt) OPTIMIZE t_tkpr_rank_desc}						
{IF ON_FIRST_UNIQUE_ROW(1)}{t_tkpr_rank_desc}{END IF}	{SUBSTR(t_tkpr_first,1,1)}. {t_tkpr_last}	{AGGREGATE_VALUE(1)} {my_total_bhours = my_total	{COMMA(AGGREGATE_VALUE(2))}	{AGGREGATE_VALUE(3)} {my_total_hours = my_total_hours +	{COMMA(AGGREGATE_VALUE(4))}	

Modular

Modules can be created for any one section. Then you can have a master template call various modules as needed thereby creating the final product – e.g., an invoice.



SAMPLE TEMPLATE – MATTER OPTIONS

BLACK, BROWN & GRAY, L.L.P.
A Registered Limited Liability Partnership
10000 PARK AVENUE
NEW YORK, NEW YORK 10000-0000
(212) 123-4567
FACSIMILE: (212) 987-6543
www.bbgray.com
I.D. 12.345678

{DRAFT 'header.rtf'}

For Professional Services Rendered for the following:

{IF (x_time_opt='01')}{DRAFT 'TIME01.rtf'}{END IF}
{IF (x_time_opt='02')}{DRAFT 'TIME02.rtf'}{END IF}
{IF (x_time_opt='03')}{DRAFT 'TIME03.rtf'}{END IF}
{IF (x_time_opt='04')}{DRAFT 'TIME04.rtf'}{END IF}
{IF (x_time_opt='05')}{DRAFT 'TIME05.rtf'}{END IF}
Time Detail Options
{IF (x_tksum_opt='01')}{DRAFT 'TSUM01.rtf'}{END IF}
{IF (x_tksum_opt='02')}{DRAFT 'TSUM02.rtf'}{END IF}
Tkpr Summary Options
{IF (x_disb_opt='01')}{DRAFT 'DISB01.rtf'}{END IF}
{IF (x_disb_opt='02')}{DRAFT 'DISB02.rtf'}{END IF}
{IF (x_disb_opt='03')}{DRAFT 'DISB03.rtf'}{END IF}
Disbursement Detail Options
{IF (x_arstmt_opt='01')}{DRAFT 'AR01.rtf'}{END IF}
{IF (x_arstmt_opt='02')}{DRAFT 'AR02.rtf'}{END IF}
A/R Options
{IF (x_remit_opt='01')}{DRAFT 'REM01.rtf'}{END IF}
Remit Options

DOCUMENT AND MAINTAIN TEMPLATES

When you are setting up your templates, devise a style or format that your firm will always follow. This will keep your templates structured and easy to modify. Using this approach several "modules" can be created for any one section. Then you can have a "master" template "call" various modules as needed thereby creating the final product – e.g., an invoice.

Most bills have common sections. First, review your bills to determine what sections they have in common. For example, if you use the same header on all bills, that is considered a section. Most bills have a header section, fee detail section, expense summary or detail section, and a billing summary at the beginning or end of the bill. DocuDraft instructions can be entered into a template to create a module or section. The modules become the "building blocks" for your master templates.

CONTROL WHEN A SECTION OF THE TEMPLATE SHOULD PRINT OR NOT

- {IF COUNT(time_info,'t_matterid=m_id and t_prt='Y’'")<>0}{DRAFT 'timesummary01.rtf'}{END IF}
- {IF m_bill_disb<>0}{DRAFT 'disbdetail01.rtf'}{END IF}

TEMPLATE DOCUMENTATION

It is important to document your templates. Using the %, REM or DRAFT OFF commands you can record changes and updates to your template without printing this information on the output document.

The following is an example which should be placed at the top of your template to identify the contents and changes:

{DRAFT OFF}
The command in the preceding line turns the printer off

Filename:	BILL1.TMP
Author:	John James
Purpose:	Standard single & consolidated bill format. First page includes totals on the bill as well as AR. Second page lists attorney summary (timekeeper/ hours/amount/rate) and cost summary (cost description/amount) for all matters on the bill. Remaining pages show time detail (date/hours/ timekeeper/narrative) and cost detail (date/ narrative/amount) by matter. Costs are summarized depending on the summarize flag. This bill has a header showing client, matter number and page number.
Modification Log:	

Date	**Initials**	**Description**
02/05/06	TAB	Added date format before printing time detail on pg 2

{DRAFT ON}

DOCUDRAFT VARIABLES

DATABASE VARIABLES

Database variables pull information from the database, such as bill number, matter code, bill amount, fee details, disbursement details, etc.

A listing of all the variables is located in the **DocuDraft Toolkit** and identifies each field in the database.

Examples:	{bill_date}	The date printed on the bill
	{bill_number}	The bill number printed on the bill
	{p_code}	Payor Code
	{m_code}	Matter Code

USER DEFINED VARIABLES

You can define your own name and value of a variable; we suggest using a prefix of "xx_" on all user defined variables for readability and identification.

Example: { xx_ total=m_bill_fees + m_bill_disb }

Create International Dates using a User Defined Variable

```
{xx_ukday=NUM_TO_TEXT(DAY(Bill_Date))}
{IF xx_ukday ="1","21","31"}{xx_suffix="st"}
{ELSE IF xx_ukday ="2","22"}{xx_suffix="nd"}
{ELSE IF xx_ukday ="3","23"}{xx_suffix="rd"}
{ELSE}{xx_suffix="th"}
{END IF}
{xx_ukmonth=TEXT_MONTH(Bill_Date)}
{xx_bmonth= NUM_TO_TEXT(MONTH(Bill_Date))}
{xx_ukyear=NUM_TO_TEXT(YEAR(Bill_Date))}
{xx_bill_date=xx_ukday+ xx_suffix +" "+ xx_ukmonth +" "+xx_ukyear}
```

SYSTEM VARIABLES

_FORMAT

Is an assignable system variable used to assign default values for the numerical function. NOTE: If you want a comma to appear in the value you should use the function **FORMAT** in front of the database variable.

Example: {_FORMAT="CD2("}
{ FORMAT (m_bill_total)} Returns: 10,000.00

_DATE_OUPUT

Valid values are ANSI (YY/MM/DD), US (MM/DD/YY), CDN (DD/MM/YY), LEGAL (14th day of June) and STD (June 14, 2006).

Example: {_DATE_OUTPUT="US"}

COMMANDS

Commands are **DocuDraft** instructions to read or extract data from the database.

Examples

- {REPEAT time_info WHERE m_id = t_matterid AND t_prt ='Y' OPTIMIZE t_narrative}
- {REPEAT disbursement_info WHERE m_id = d_matterid AND d_prt = 'Y' AND d_cost='phone' ORDER BY d_cost_desc, d_date OPTIMIZE d_cost_desc}

List of Common Commands

Command	Description
%	Comment a DocuDraft template
DRAFT	Process another template and return when completed
DRAFT OFF	Stop writing output text to the output document
DRAFT ON	Start writing output text to the output document
FOR	Process a loop a specified number of times
IF	Process a block of text & commands based on a condition
SQL EXECUTE	Execute a SQL command on a given connection
REPEAT	Loop through all records in a one to many database relationship

FUNCTIONS

Functions are **DocuDraft** instructions that manipulate data.

Examples

- {UPPER (DATE_TO_TEXT (t_date) }
- {COMMA(t_amt)}
- {IFF(ON_FIRST_ROW(),"$ ","")}

List of Common Functions

Function	Description
AGGREGATE_VALUE()	Used in a REPEAT with a GROUP BY clause to retrieve a total
COMMA()	Convert a number to text formatted with commas
COUNT()	Count the number of records in a one to many relationship
DATE_TO_TEXT()	Convert a date value to text
ON_FIRST_ROW()	Check if you are on the first row of the current REPEAT
ON_FIRST_UNIQUE_ROW()	Check if you are on the first unique row of the current REPEAT
ON_LAST_ROW()	Check if you are on the last row of the current REPEAT
ROUND()	Round a numeric value to a specified precision
UPPER()	Convert a text value to upper case characters

FORMATTING

Formatting Code

DocuDraft supports document formatting with the use of text formatting codes. Each code is delimited by an opening and closing square bracket, "[ ]" (NOTE: All instructions to DocuDraft must be enclosed inside of curly braces { }).

The following is a list of common formatting codes:

- [HPG] Adds a hard page break to the text. All text immediately following is displayed on the next page.
- [HRT] Adds a hard return to the text. All text immediately following is displayed on the next line.

For Example:

> {DRAFT FEES003.RTF}{"[HPG]"}
> {DRAFT DISB005.RTF}
>
> In this example the DocuDraft instructions in the file FEES003.RTF would be performed, then a page break would be performed and then the DocuDraft instructions in the file DISB005.RTF would be performed.

Using Functions v. Word Possessing tools

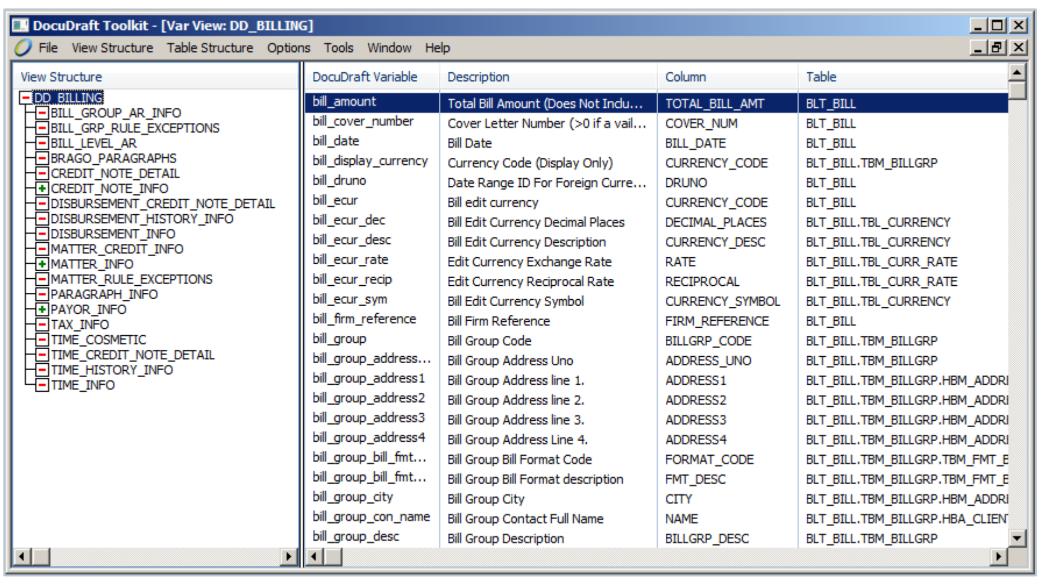
Functions: {UPPER(m_name)} v. Word:

- Select your text and click on the **Format** option in the main menu of Word. Click **Font** menu option. On the **Font** tab, in the **Effects** section, click the **All Caps** checkbox to place a checkmark.
- Underlines- Using tables – borders & shading.

DOCUDRAFT TOOLKIT

Accessing the Toolkit and the Billing Variables

1. From the Bin directory, find **Toolkit.exe**. Add a Shortcut to your desktop.
2. Launch the Toolkit. Go to **File | Open | Variable View** and select **DD_BILLING**.



Add Variables (onto the Template) from the Toolkit

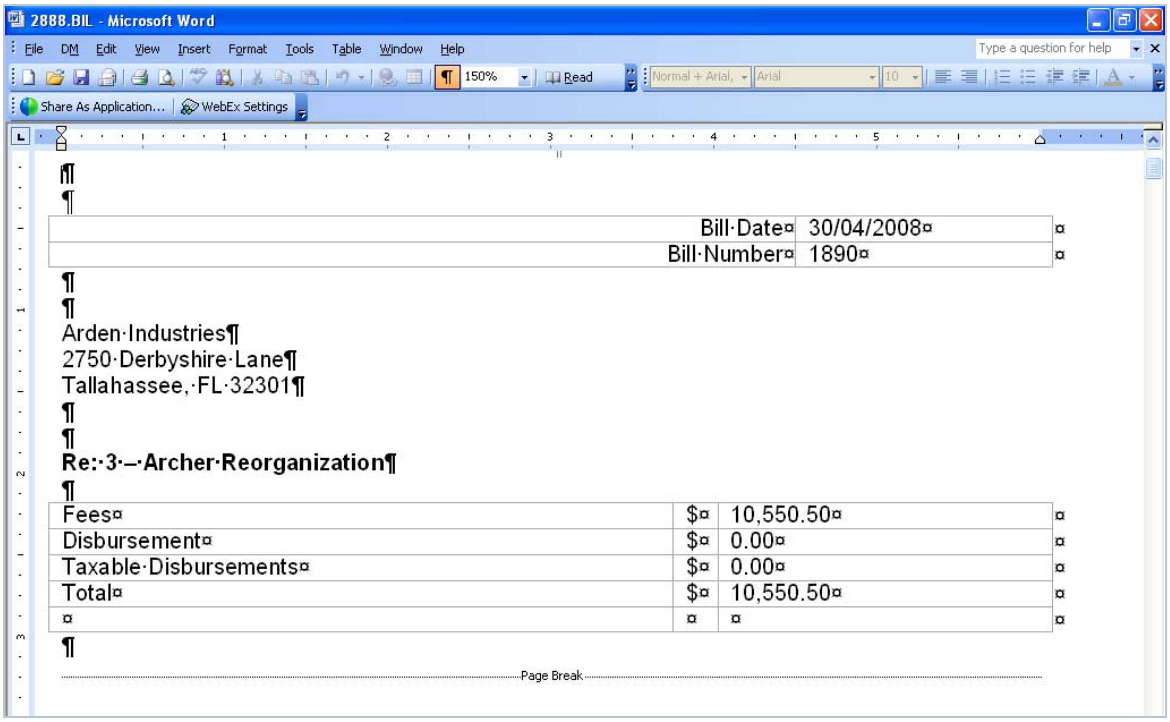
1. Within Toolkit, go to **Options** | **Add Braces.**
2. Double click on a variable. Note: The variable will be added directly to the word processor.

TEMPLATE CREATION

INTRODUCTION SECTION: HEADER

Most bills include introductory information pertaining to the bill such as bill date, bill number, billing attorney, payor code, payor name, payor contact and address. Often times, you might opt to print fields such as the payor name, bill date and bill number on each page of the bill. This is accomplished simply by including the appropriate codes in the header of the template. The payor and bill information is retrieved using variables with the "P_" prefix, the "Bill_" prefix, and others.

Header – Example One: Creating a Header for a bill or prebill.



CREATE A HEADER

1. Start with a table.
2. Create a Table with 2 columns and 2 rows. In the first row, second column enter Invoice : {bill_number}
3. Repeat the similar action for the Bill Date.
4. Below the table, add lines for the Contact and Address variables. Add a line: For Professional Services - RE: {m_long_name}
5. Above the table, enter the system variable for Dates and Amounts.

Sample Template Section

{ _FORMAT = "CD2(" }
{_DATE_OUTPUT='US'}

	Invoice: { bill_number }
	Bill Date: { bill_date }

{ p_contact_first } { p_contact_last }
{ p_long_name }
{ p_address1 }
{ p_address2 }
{ p_city }, { p_state_prov_code } { p_zip_code }

For Professional Services Rendered – RE: { m_long_name }

Header – Example Two: Working with override names, person v. organizations, empty address lines and a matter summary.

	Invoice: 1203
	Bill Date: 06/30/06

Williams, Gregory W.
This is the override name
2750 Derbyshire Lane
Tallahassee FL32301

Fees	15,334.00
Disbursements	417.65
Total	16,857.76

USE THE OVERRIDE NAME VS. THE PAYOR NAME

1. To see if the override name is being used, enter {IF NOT EMPTY(p_address_name)}{p_address_name}
2. To see if the payor name is a person vs. organization, enter {ELSE} {IF p_name_type="O"} {p_long_name} {ELSE}{IF NOT EMPTY(p_prefix)}{p_prefix}{END IF}{p_first}{IF NOT EMPTY(p_middle_name)} {p_middle_name}{END IF}{p_last}{IF NOT EMPTY(p_suffix)}, {p_suffix}{END IF} {END IF}{END IF}

NOTE: there should be 3 {END IF} at the very end of the payor name instruction:

1. To close the {IF NOT EMPTY(p_suffix)}, {p_suffix} instruction, enter {END IF}
2. To close the "IF p_name_type='O' instruction, enter {END IF}
3. To close the {IF NOTEMPTY (address_name)}, enter {END IF}

WORK WITH EMPTY ADDRESS LINES

1. Enter {p_address1}
2. {IF NOT EMPTY(p_address2)}{p_address2}{'[HRT]'}{END IF}{IF NOT EMPTY(p_address3)}{p_address3} {'[HRT]'}{END IF}{IF NOT EMPTY(p_address4)}{p_address4}{'[HRT]'}{END IF}{p_city} {p_state_prov_code} {p_zip_code}
3. Use {'[HRT]"} formatting codes to ensure the proper carriage returns between address lines.
4. Use {IF NOT EMPTY…} instructions to see if the address line is being used.

ADD A MATTER SUMMARY

1. Create a table with 3 rows and 2 columns. In the first row, first column, enter the word FEES - In the first row, second column, enter the variable {FORMAT(m_bill_fees)}
2. Repeat similar action for both DISBURSEMENTS and TOTAL rows.

Sample Template Section

{_FORMAT = "CD2(" }
{_DATE_OUTPUT='US'}

	Invoice: { bill_number }
	Bill Date: { bill_date }

{p_contact_name}
{IF NOT EMPTY(p_address_name)}{p_address_name}{ELSE} {IF p_name_type="O"} {p_long_name} {ELSE}{IF NOT EMPTY(p_prefix)}{p_prefix}{END IF}{p_first}{IF NOT EMPTY(p_middle_name)}{p_middle_name}{END IF}{p_last} {IF NOT EMPTY(p_suffix)}, {p_suffix}{END IF} {END IF} {END IF}
{p_address1}
{IF NOT EMPTY(p_address2)}{p_address2}{'[HRT]'}{END IF}{IF NOT EMPTY(p_address3)}{p_address3}{'[HRT]'} {END IF}{IF NOT EMPTY(p_address4)}{p_address4}{'[HRT]'}{END IF}{p_city} {p_state_prov_code}{p_zip_code}

Fees	{FORMAT(m_bill_fees)}
Disbursements	{FORMAT(m_bill_disb)}
Total	{FORMAT(m_bill_total)}

CREATING A FEE DETAIL SECTION

The Fee Detail section displays the time entries on the bill. You can include any of the fields from the time entry: date, timekeeper, hours, rate, value, narrative, action code, phase code, task code, location. Furthermore, you can choose the sorting order of the entries. For example, you can sort by date and then timekeeper or by phase, date and timekeeper, etc. It is recommended that you use a table to set up the Fee Detail section. This ensures that the columns will align properly and also allows you to specify column headings that will repeat on subsequent pages.

FEE DETAIL – EXAMPLE ONE

Time Detail

Date	Tkpr	Narrative	Hours	Rate	Amount
01/09/2007	J. Ireland	Client Development activities	2.50	59.24	$148.10
01/09/2007	P. Edwards	General case preparation and other pertinent activities in relation to project	2.00	77.95	155.90
08/09/2007	J. Ireland	Client Development activities	1.80	59.24	106.63
11/09/2007	J. Ireland	General Research activities	3.30	59.24	195.49
12/09/2007	J. Ireland	Client Development activities	1.80	59.24	106.63
12/09/2007	J. Ireland	Review and revise related case douments	1.00	59.24	59.24
17/09/2007	J. Ireland	General Research activities	3.80	59.24	225.12
16/09/2007	J. Ireland	General Research	2.80	59.24	165.87

Sample Template Section

Date	Tkpr	Narrative	Hours	Rate	Amount
{REPEAT time_info WHERE m_id=t_matterid AND t_prt='Y' ORDER t_date,t_tkpr_name OPTIMIZE t_narrative}					
{t_date}	{t_tkpr_name}	{t_narrative}	{t_hrs}	{t_rate}	{COMMA(t_amt,2)}
{END REPEAT}					
Total					{COMMA(m_bill_fees,2)}

FEE DETAIL – EXAMPLE TWO

Time Detail by Timekeeper

Timekeeper Date	Narrative	Hours	Rate	Amount
PAT EDWARDS				
01/09/2007	General case preparation and other pertinent activities in relation to project	2.00	125.00	250.00
24/09/2007	General case preparation and other pertinent activities in relation to project	3.50	125.00	437.50
25/09/2007	General Research activities	3.30	125.00	412.50
26/09/2007	Telephone conversation with client regarding case	3.50	125.00	437.50
29/09/2007	Review and revise related case douments	0.80	125.00	100.00
02/10/2007	Review file	5.00	250.00	1250.00
01/02/2008	General case preparation and other pertinent activities in relation to project	2.00	0.00	0.00
24/02/2008	General case preparation and other pertinent activities in relation to project	3.50	0.00	0.00
25/02/2008	General Research activities	3.20	0.00	0.00
26/02/2008	Telephone conversation with client regarding case	3.50	0.00	0.00
29/02/2008	Review and revise related case douments	0.70	0.00	0.00
01/03/2008	General case preparation and other	2.00	0.00	0.00

Sample Template Section

Time Detail by Timekeeper
{xx_hrs=0}{xx_tamt=0}

Timekeeper Date	Narrative	Hours	Rate	Amount
{REPEAT time_info WHERE m_id=t_matterid AND t_prt='Y' ORDER BY t_tkpr_name,t_date OPTIMIZE t_narrative}				
{IF ON_FIRST_UNIQUE_ROW(1)} **{UPPER(t_tkpr_first)} {UPPER(t_tkpr_last)}** {END IF}				
{t_date}	{t_narrative}	{t_hrs}{xx_hrs=xx_hrs+t_hrs}	{t_rate}	{t_amt}{xx_tamt=xx_tamt+t_amt}
{END REPEAT}				
Total		{xx_hrs}		{xx_tamt}

CREATING A FEE SUMMARY SECTION

The Fee Summary section allows you to summarize the time entries on the bill. Fee hours are typically summarized by timekeeper, by rank, and/or by phase/task.

FEE SUMMARY – EXAMPLE ONE

Timekeeper	Hrs	Rate	Amount
Curran, Stephen	30.00	175	$5250.0000
Edwards, Pat	12.50	185	2312.5000
Fountain, Bill	16.10	185	2978.5000
Ireland, Jill	20.80	175	3640.0000
Total For timekeepers	79.40		$15334.00

Sample Template Section

{xx_hrs=0}

Timekeeper	Hrs	Rate	Amount
{repeat time_info where m_id=t_matterid and t_prt='Y' order by t_tkpr_name GROUP BY T_tkpr AGGREGATE SUM(t_hrs), SUM(t_amt)}			
{t_tkpr_name}{xx_hrs =xx_hrs+aggregate_val ue(1)}	{format(aggregate_value(1))}	{format(aggregate_value(2)/aggregate_value(1))}	{IFF(ON_FIRST_RO W(),"$"," ")}{format(aggregate_ value(2))}
{end repeat}			
Total For timekeepers	{xx_hrs}		${m_bill_fees}

FEE SUMMARY – EXAMPLE TWO

		TIMEKEEPER SUMMARY					
Atty	Status	Timekeeper	Avg Rate	Hours	Std Value	Time Value	Last Entry
297	Associate	Edwards, Pat	185.00	15.80	4,882.50	2,923.00	May 20, 2003
398	Associate	Fountain, Bill	185.00	16.10	4,960.00	2,978.50	May 21, 2003
291	Research Assistant	Ireland, Jill	175.00	23.90	4,347.50	4,182.50	May 30, 2003
903	Research Assistant	Curran, Stephen	175.00	30.00	5,503.75	5,250.00	May 29, 2003
		TIME TOTAL		85.80	$19,693.75	$15,334.00	

Sample Template Section

{x_hrs_amt=0}{x_std_amt=0}

		TIMEKEEPER SUMMARY					
Atty	Status	Timekeeper	Avg Rate	Hours	Std Value	Time Value	Last Entry
{REPEAT TIME_INFO WHERE m_id=t_matterid GROUP BY t_tkpr ORDER BY t_rank Aggregate sum(t_hrs),sum(t_samt),sum(t_amt), max(t_date)} {x_hrs_amt=x_hrs_amt+aggregate_value(1)}{x_std_amt=x_std_amt+aggregate_value(2)}							
{t_tk pr}	{t_tkpr_rank_desc}	{t_tkpr_name}	{aggregate_valu e(3)/aggregate_v alue(1)}	{aggreg ate_valu e(1)}	{comma(ag gregate_valu e(2))}	{comma(aggr egate_value(3))}	{aggregate_ value(4)}
{END REPEAT}							
		TIME TOTAL		{x_hrs_ amt}	${comma(x _std_amt)}	${comma(m_ bill_fees)}	

CREATING A DISBURSEMENT DETAIL SECTION

The Disbursement Detail section displays the disbursement entries on the bill. You can include any of the fields from the disbursement entry: date, disbursement type, description of disbursement, timekeeper, quantity, dollar value, narrative, phase code and task code. Furthermore, you can choose the sorting order of the entries. For example, you can sort by date and then disbursement type or by phase, date and disbursement type, etc.
It is recommended that you use a table to set up the Disbursement Detail section. This ensures that the columns will align properly and also allows you to specify column headings that will repeat on subsequent pages

DISBURSEMENT DETAIL – EXAMPLE ONE

Cost	Desc	Amount
COPY	Photocopies	200.0000
FAX	Facsimile	100.0000
MILE	Auto-Mileage	117.6500
Total		417.6500

Sample Template Section

Cost	Desc	Amount
{REPEAT disbursement_info where d_matterid=m_id and d_prt="Y" ORDER BY d_cost GROUP BY d_cost AGGREGATE SUM(d_amt)}		
{d_cost}	{d_dsp_cost_desc}	{FORMAT(aggregate_value(1))}
{END REPEAT}		
Total		{FORMAT(m_bill_disb)}

DISBURSEMENT DETAIL / SPLITTING HARD AND SOFT – EXAMPLE TWO

Soft Disb			
Date	Cost	Narrative	Amount
04/09/2007	FAX	Copy of deposition Facsimile	87.65
04/09/2007	FAX	Letters for signature Facsimile	87.65
04/09/2007	FAX	Letters for approval Facsimile	87.65
04/09/2007	FAX	Letters Facsimile	87.65
04/09/2007	FAX	Documents Facsimile	87.65
04/09/2007	FEDEX	Letters Shipping Fees	87.65
25/09/2007	FEDEX	Motion filing Shipping Fees	87.65
30/09/2007	FEDEX	Ship documents Shipping Fees	80.35

Hard Disb			
03/03/2008	CRENT	Car Rental	657.41
30/03/2008	ONLINE	General Online Research Online Research	0.00
Total			1,351.31

Sample Template Section

Date	Description	Amount
SOFT DISBURSEMENTS		
{REPEAT disbursement_info where d_matterid=m_id AND d_prt="Y" AND d_disb_type="S" ORDER BY d_cost_desc, d_date OPTIMIZE d_narrative}		
{d_date}	{IF NOT EMPTY(d_narrative)}{d_narrative}ELSE {d_dsp_cost_desc}{END IF}	{IFF(ON_FIRST_ROW(),"$"," ")}{FORMAT(d_amt)}
{END REPEAT}		
HARD DISBURSEMENTS		
{REPEAT disbursement_info where d_matterid=m_id AND d_prt="Y" AND d_disb_type="H" ORDER BY d_cost_desc, d_date OPTIMIZE d_narrative}		
{d_date}	{IF NOT EMPTY(d_narrative)}{d_narrative}ELSE {d_dsp_cost_desc}{END IF}	{IFF(ON_FIRST_ROW(),"$"," ")}{FORMAT(d_amt)}
{END REPEAT}		
Total Disbursements		{FORMAT(m_bill_disb)}

CREATING A DISBURSEMENT DETAIL SECTION

The Disbursement Summary section allows you to summarize the disbursement entries on the bill. The disbursements are typically summarized by date, by disbursement type, and/or by phase/task.

DISBURSEMENT SUMMARY EXAMPLE

Photocopies	200.00
Facsimile	100.00
Auto-Mileage	117.65
	$417.65

Sample Template Section

Summary of Disbursements
{REPEAT DISBURSEMENT_INFO where d_matterid=m_id and d_prt='Y' ORDER BY d_cost GROUP BY d_cost AGGREGATE SUM(d_amt)}

{d_cost_desc}	{aggregate_value(1)}
{END REPEAT}	
	${m_pcur_bill_disb}

USER DEFINED VARIABLES AND CALCULATIONS

Working user defined variables and calculations in a header.

Williams, Gregory W.
This is the override name
2750 Derbyshire Lane
Tallahassee FL32301

Fees	15,334.00
Discount	4,359.75
Disbursement	417.65
TAXABLE DISBURSEMENT	217.65
Total	16,857.76

CREATE A USER DEFINED VARIABLE TO TOTAL THE MATTER LEVEL TAXABLE DISBURSEMENTS

1. To the matter summary table and add a row below Disbursements.
2. Enter in the first row, first column the phrase “Taxable Disbursements”.
3. In the first row, second column enter the variable {FORMAT(xx_disb_tax)}
4. Within Draft OFF, define the xx_disb_tax variable | Enter {xx_disb_tax=0}{xx_disb_tax=SUM(disbursement_info, "d_amt", "m_id=d_matterid AND d_cost_taxable='Y'")}

CREATE CALCULATION USING A USER DEFINED VARIABLE TO TOTAL DISCOUNTS

1. To the matter summary table, add a row below FEES.
2. Enter in the first row, first column enter the word “Discount”.
3. In the first row, second column enter the variable {FORMAT(xx_standard-m_bill_fees)}
4. Within Draft OFF, define the xx_standard variable | Enter {xx_standard=0}{xx_standard=SUM(time_info, "t_samt", "m_id=t_matterid")}

Sample Template Section

{DRAFT OFF}
{_FORMAT='CD2('}
{_DATE_OUTPUT='CDN_C'}
{xx_disb_tax=0}{xx_disb_tax=SUM(disbursement_info, "d_amt", "m_id=d_matterid AND d_cost_taxable='Y'")}
{xx_standard=0}{xx_standard=SUM(time_info, "t_samt", "m_id=t_matterid")}
{DRAFT ON}

{p_contact_name}
{IF NOT EMPTY(p_address_name)}{p_address_name}{ELSE} {IF p_name_type="O"} {p_long_name} {ELSE}{IF NOT EMPTY(p_prefix)}{p_prefix}{END IF}{p_first}{IF NOT EMPTY(p_middle_name)}{p_middle_name}{END IF}{p_last}{IF NOT EMPTY(p_suffix)}, {p_suffix}{END IF} {END IF} {END IF}
{p_address1}
{IF NOT EMPTY(p_address2)}{p_address2}{'[HRT]'}{END IF}{IF NOT EMPTY(p_address3)}{p_address3}{'[HRT]'}{END IF}{IF NOT EMPTY(p_address4)}{p_address4}{'[HRT]'}{END IF}{p_city} {p_state_prov_code}{p_zip_code}

Fees	{FORMAT(m_bill_fees)}
Discount	{FORMAT(xx_standard-m_bill_fees)}
Disbursement	{FORMAT(m_bill_disb)}
TAXABLE DISBURSEMENT	{FORMAT(xx_disb_tax)}
Total	{FORMAT(m_bill_total)}

SHADING

To create alternating shaded lines on detail lines of certain sections of the bill or prebill.

Time Detail						
Time ID	Date	Init	Narrative	Hours	Rate	Amount
1862	01/01/08	PPE	Review contract drafts; telephone conversations with client	1.00	300.00	$ 300.00
1863	01/02/08	PPE	Review contract drafts; telephone conversations with client	1.00	300.00	300.00
1864	01/03/08	SSH	Review draft of contract; discuss with Don Edwards	1.00	150.00	150.00
1865	01/04/08	MMB	Meeting with Howard & Smith representatives	1.00	230.00	230.00
1866	01/05/08	MMB	Meeting with Howard & Smith representatives	1.00	230.00	230.00
1867	01/06/08	GT	Conversation with Avis Arden regarding counter offer	1.00	350.00	350.00
1868	01/07/08	GT	Conversation with Avis Arden regarding counter offer	1.00	350.00	350.00
1869	01/08/08	JJJ	File response	1.00	125.00	125.00
1870	01/09/08	ACC	Phone negotiation with Allan Arden regarding purchase price	1.00	290.00	290.00
1871	01/10/08	ACC	Phone negotiation with Allan Arden regarding purchase price	1.00	290.00	290.00

Time Detail						
Time ID	Date	Init	Narrative	Hours	Rate	Amount
			Total	10.00		2,615.00

Create Shading for Every Other Row

1. Create a user-defined variable (e.g., xx_flag) and initialize it to _TRUE.
2. Inside the REPEAT command create the IF statement as shown below with one line of detail without shading as the true statements and one line of detail with shading as the false statements.
3. In Microsoft Word, to shade the row, highlight the row and then select **Format – Borders - Shading** menu option. When the pop-up screen appears, click the **Shading** tab. Select the 10% Gray cell and then click **OK**.
4. Include the xx_flag=_FALSE instruction as part of the unshaded row and the xx_flag=_TRUE instruction as part of the shaded row as shown in the table below.

Sample Template Section

{xx_flag=_TRUE}{ xx_thrs=0}

Time Detail						
Time ID	Date	Init	Narrative	Hours	Rate	Amount
{REPEAT time_info WHERE t_matterid = m_id ORDER BY t_date, t_atkpr } {xx_thrs=xx_thrs + t_hrs}**{IF xx_flag}**						
{t_id}	{t_date}	{t_atkpr_init}	{t_narrative}**{xx_flag=_FALSE }**	{t_hrs}	{t_rate}	{IFF(ON_FIRST_ROW(),"$ ","")}{FORMAT(t_amt)}
{ELSE}						
{t_id}	{t_date}	{t_atkpr_init}	{t_narrative}**{xx_flag=_TRUE }**	{t_hrs}	{t_rate}	{IFF(ON_FIRST_ROW(),"$ ","")}{FORMAT(t_amt)}
{END IF} {END REPEAT}						
			Total	{xx_thrs}		$ {FORMAT(m_bill_fees)}

QUIZ TIME

1. [T / F] In order to point to the location of the actual DocuDraft files, you must create DocuDraft Paths.
2. A bill format can be assigned in
    a. Billing Parameters
    b. Bill Groups
    c. Billing Desktop
    d. All of the Above
3. DocuDraft instructions are enclosed in
    a. Braces { }
    b. Brackets [ ]
    c. Parentheses ( )
    d. Quotes " "
4. There are two types of templates: All in one and ____________________.
5. [T / F] If you want to prevent comments from being printed on the actual document, but want them there for reference it is best to use the {DRAFT OFF} command.
6. [T / F] You can only use database variables, user defined variables are not allowed.
7. Which command should you use to loop through all records in a one to many database relationship?
    a. DRAFT
    b. FOR
    c. IF
    d. REPEAT
8. UPPER, COMMA and COUNT are known as ________________________.
9. The DocuDraft ___________________ is used to add predefined variables.
10. [T / F] Tables are often used to organize a template.

QUIZ ANSWERS

1. True
2. D. All of the above
3. A. Braces
4. Modular
5. True
6. False
7. D. REPEAT
8. Functions
9. Toolkit
10. True