User Guide

Contents

Welcome to the iDraft CL1 User Guide

Thank you for choosing iDraft software. iDraft CL1 has been designed to be intuitive and easy to use, though we expect that the user will have knowledge of costs drafting and this User Guide is not intended to be a guide on how to draft Claim1s and Claim1As.

Running iDraft CL1:

Once installed you can access the software either through the desktop or quick launch icons (if you chose to create a link from those places) or by clicking Start, All Programs, iDraft CL1 1.1, iDraft CL1.

Example Documents:

To aid your getting to know the program, a number of example CL1 files can be found in the 'Example Files' folder within the Program folder
(normally C:\Program Files\iDraft CL1 1.1).

Standard Features

Character Count Boxes

Initials: [   ] [6]   Surname: [   ] [17]

As the Claim1 and Claim1A forms are created to a fixed template, iDraft CL1 includes a handy way of estimating the amount of text that can be entered before problems occur. Character Count Boxes will never restrict the amount of characters you may that type, the number shown is purely advisory.

If the number shown is in brackets, this means that on exceeding the recommended character count an overrun sheet will be generated for this field.

As you type you will notice the number reducing with each stroke. A colour is used to indicate the status of the box.

Green / Orange: Below recommended character count.
Red: Over recommended character count.
Blue: Over recommended character count, so an overrun sheet will be generated.

Spell Check
Most text boxes within iDraft CL1 contain an inbuilt spell check function. Any unrecognised words will be underlined in red. Right-clicking on the underlined word will present the following options:

- A number of alternative spellings (if available).
- An option to add the word to the list of accepted words.
- An option to ignore all instances of the word.

Replacements
Most text boxes within iDraft CL1 contain an inbuilt Replacements function. Replacements are a convenient tool for saving time on typing commonly used phrases. Replacements can be set up from the Preferences screen (see Preferences section) or by right-clicking in a text box and selecting 'Edit Replacements...'

To use a Replacement simply type in the defined Input Text and press the space-bar. The Input Text will be replaced by the defined Output Text.

Grids

Extended functions are available on most Grids throughout iDraft CL1 via right-clicking items in the Grid. In most cases the option to delete items is accessed via the right-click function.

Tab Ordering / Default Function

On opening most windows within the program, where an 'Add' button is available it will generally be the default button. Therefore, on pressing 'Enter', the 'Add' button's function will be called without the need to click on the button with the mouse.

The Tab key on your keyboard can be used to move between the various fields and buttons on any form. The order in which the Tab button moves from field to field has been specifically designed to suit the most commonly used functions.

Previous / Next Buttons

When completing the form, clicking the Previous / Next buttons at the bottom left of the screen will automatically save the information entered and launch the next or previous section of the form.

Sliding Boxes

Sliding Boxes have been designed to allow large amounts of options to be displayed in an uncluttered manner. To switch between different Boxes simply click on the Box's header. The example above contains 3 Sliding Boxes (General Settings, Solicitor Details and Rates).

Re-ordering Arrows

The order of most Grid items within iDraft CL1 can be changed by using the Re-ordering Arrows to the top-right of the Grid. In most cases, the order of items within a Grid will have a direct effect on the order in which they appear in the Bill. Where the Re-ordering Arrows are available, non-date-ordered items may be moved to any position in the Grid. Any date ordered items may be moved within a common date. This is so that dated items remain in a chronological order. To move an item, select it

within the Grid and click the corresponding Arrow for the direction you wish to move the item.

Date Boxes
Date fields within iDraft CL1 give the option to attach no date. To remove the date from an item simply uncheck the Date tickbox. Any undated items will appear at the end of any chronologically ordered items.

Date boxes remember year of the last date entered, e.g. 21/04 will display 21/04/1999 following a previous input of 20/04/1999. A subsequent input of 19/03/2001 will result in the default year becoming 2001.

Time Boxes
Time can be entered in 3 ways:

1. Units: iDraft CL1 calculates units in 6 minute intervals. Each unit has a value of 0.1, e.g. 1.5 equals 15 units and results in 01:30 or 1.55 equals 15½ units and results in 01:33.
2. Hours and Minutes: Enter time in the format (h)h:(m)m to directly enter hours and minutes, e.g. 1:6 results in 01:06.
3. Minutes: Round numbers display as minutes, e.g. 100 results in 01:40.

Type-ahead Boxes
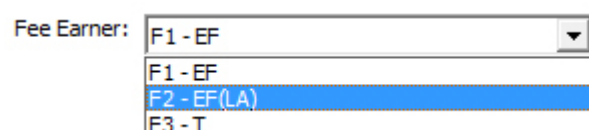Where possible, iDraft CL1 will try to pre-empt commonly entered text.

To select a result from the list of possibilities, use the up and down cursor keys to highlight the item required and press 'Enter'.

Fee Earner Selector Box

Where it is necessary to specify a fee earner, a Fee Earner Selector Box will be provided. For quick access each fee earner is allocated a keyboard shortcut, which is displayed to the left of the fee earner's reference.

Program Menus

You will more than likely recognise some of the more standard features of iDraft CL1 from the usual Windows interface. Below is an explanation of some of the functions available from the menu system.

File Menu

- New: Create a new Form.
- Open: Open an existing Form.
- Save / Save As...: Save the current Form.
- Export to Word: Export documents to Microsoft Word (See Export to Word section).
- Exit: Leave the program.

Tools

- Preferences: Edit general preferences (See Preferences section).
- Check For Blank Time / Values: Check the Bill for Schedule of Time items and Disbursements with zero values.

Preview

See Preview section

Help

- User Guide: Open the full iDraft CL1 manual.
- Keyboard Shortcuts List: Open the iDraft CL1 Keyboard Shortcuts document.
- Make a Suggestion: Complete our online suggestion box.
- About: About iDraft CL1.

Tracking Time Spent on a Form

The bottom-right of the iDraft CL1 Main Screen contains a simple stopwatch system, handy for calculating time spent working on a Form.

When stopped, the time can be overwritten manually, should it be left on or off accidentally.

Completing Your Form

The program is split into four main sections.

- Form Options
- Pre-Bill Sections
- Bill
- Post-Bill Sections

These sections are described below.
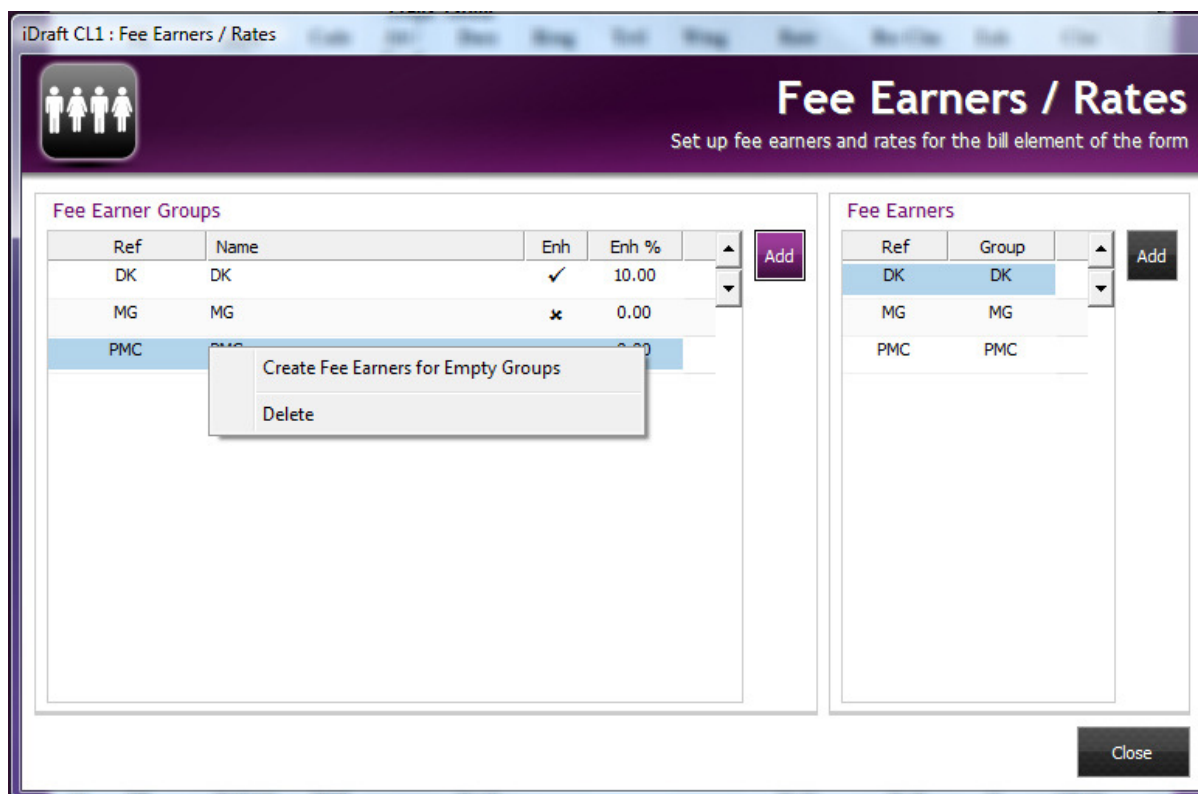
<u>Form Options</u>

Form Setup

The Form Setup screen lays out options for the setup of the Form.

- **General**
  - Form Type: Choose between Claim1 and Claim1A.
  - VAT: Set the VAT rate for the Form. Unchecking the VAT tickbox will turn off VAT for the entire form.
  - Include Panel Membership Cont Sheet: Includes an extension sheet for the Panel Membership Declaration section of the Form, in case there are more than two Panel Members.
- **Form Header**
  - Claim for costs to be assessed by the LSC / Claim for costs assessed by the Court: Relevant to the tickboxes at the top of both the Claim1 and Claim1A forms.
  - Type of Case: Shown only at the top of the Claim1 form.
- **Pages**
  - Select which pages are to be included in the Form
- **Notes**
  - A handy place for notes specific to the Form. Does not display anywhere on the Form.

Fee Earners and Rates

In iDraft CL1, any work done is assigned to a Fee Earner or Fee Earners, who in turn are assigned to a Fee Earner Group. That Fee Earner Group can then be assigned a reference and a set of rates.

Creating a Fee Earner Group

Click the 'Add' button in the Fee Earner Groups section. The following options are presented.

- **Group Setup**
    - Reference: Used mainly for the conversion process to an iDraft Pro Bill, but also as an identifier for the group throughout the program.
    - Name: Used mainly for the conversion process to an iDraft Pro Bill.
    - Enhance: Applies an Enhancement specific to this Fee Earner Group. For example, panel membership.
    - Enhance Communications: Applies the specified Enhancement rate to any Calls, Letters In and Letters Out assigned to this Fee Earner Group.

- **Rates**
  - Rates can be manually entered for each field. To quickly enter rates, click 'Load' and select a pre-defined Rate Set. These can be set up in the Preferences. (See Preferences section)
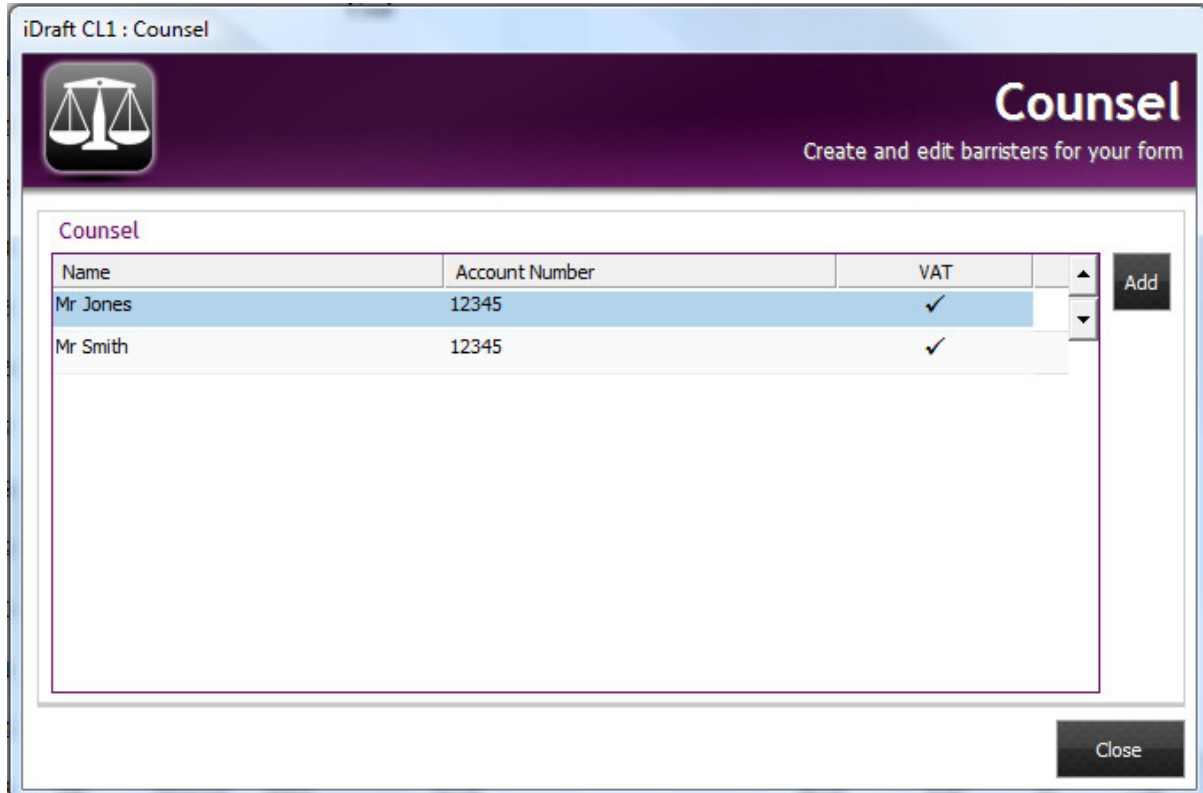
Creating Fee Earners for Fee Earner Groups

There are 2 options for creating Fee Earners:

1. Right-click on any Fee Earner Group and click 'Create Fee Earners for Empty Groups'. This options will ask your confirmation of the Fee Earners to be created, and will then create a Fee Earner for each group using the Fee Earner Group reference.
2. Click 'Add' in the Fee Earners Section
   - Enter a reference for the Fee Earner. This will be displayed on the Bill and will be used throughout the program to assign work.
   - You can create as many Fee Earners as are necessary for each Fee Earner Group. (For example, if you wish to combine the work of 4 Fee Earners into 1 set of rates, simply assign the same Fee Earner Group to each of the 4 Fee Earners.)

Counsel

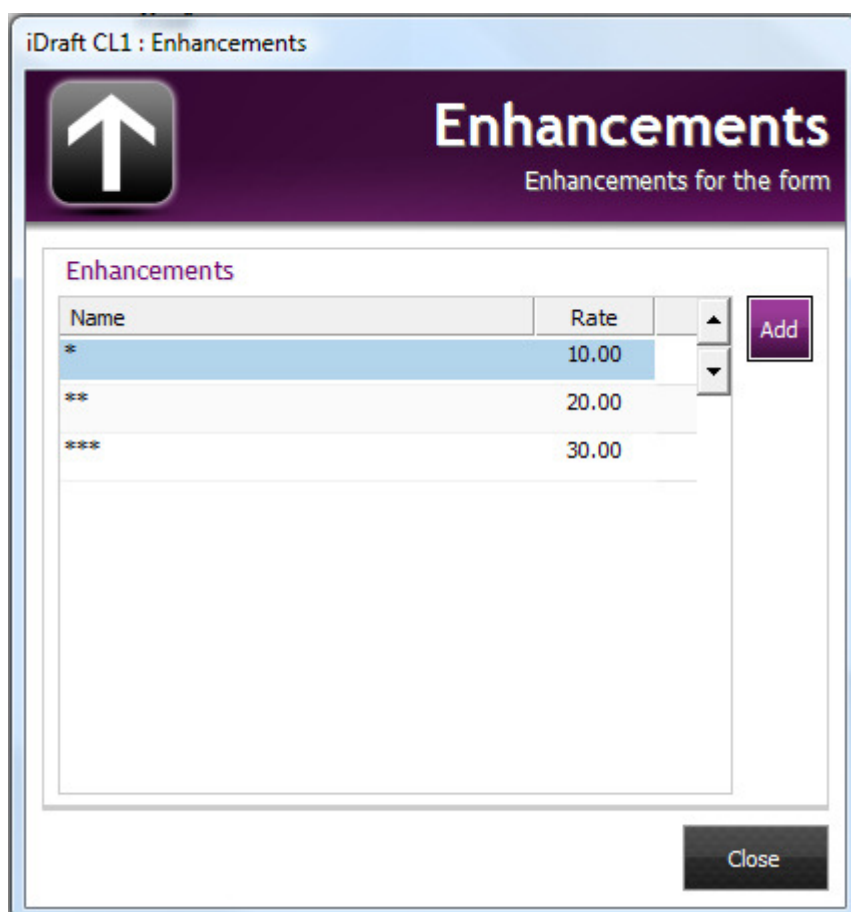Counsel can be assigned to any Disbursement.

Click the 'Add' button or double-click an existing Counsel to edit. The following options are presented:

- Name: The Counsel's name, used as an identifier throughout the program.
- Account Number: Shows on the Counsel Cost Details / Total Costs page for the Form.
- VAT: If checked, VAT is automatically calculated on the value of a Disbursement on selecting this Counsel.

Enhancements

Enhancements can be assigned to any Schedule of Time item.

Click the 'Add' button or double-click an existing Enhancement to edit. The following options are presented:

- Name: Define the marker to be used on all work enhanced using this Enhancement.
- Rate: Define a percentage to enhance by.

Throughout the program you will see fields marked 'Include in Enhancements', where you will be able to assign these General Enhancements.

Pre-Bill Sections / Post-Bill Sections

iDraft CL1 has been designed to follow as similar flow to that of completing a form by hand. The sections vary depending on which Form Type is selected.

The Pre-Bill and Post-Bill Sections generally consist of textboxes and tickboxes, each of which should be completed as per the relevant section of the form. The only relevant exception is the Actual Costs section of the Claim1A form, which is detailed below.

Actual Costs (Claim1A Only)

Two additional functions are available on the Actual Costs section. This section can be completed as normal, but to save time you may wish to use the Load Profit Costs From Bill and Auto-Calculate Fields functions.

The Load Profit Costs Form Bill function will automatically populate the Profit Costs (exc advocacy) field with the total of all Schedule of Time items (minus any marked as advocacy), plus the total of all communications. The Profit Costs VAT field is then populated according to the VAT rate defined in Form Setup.
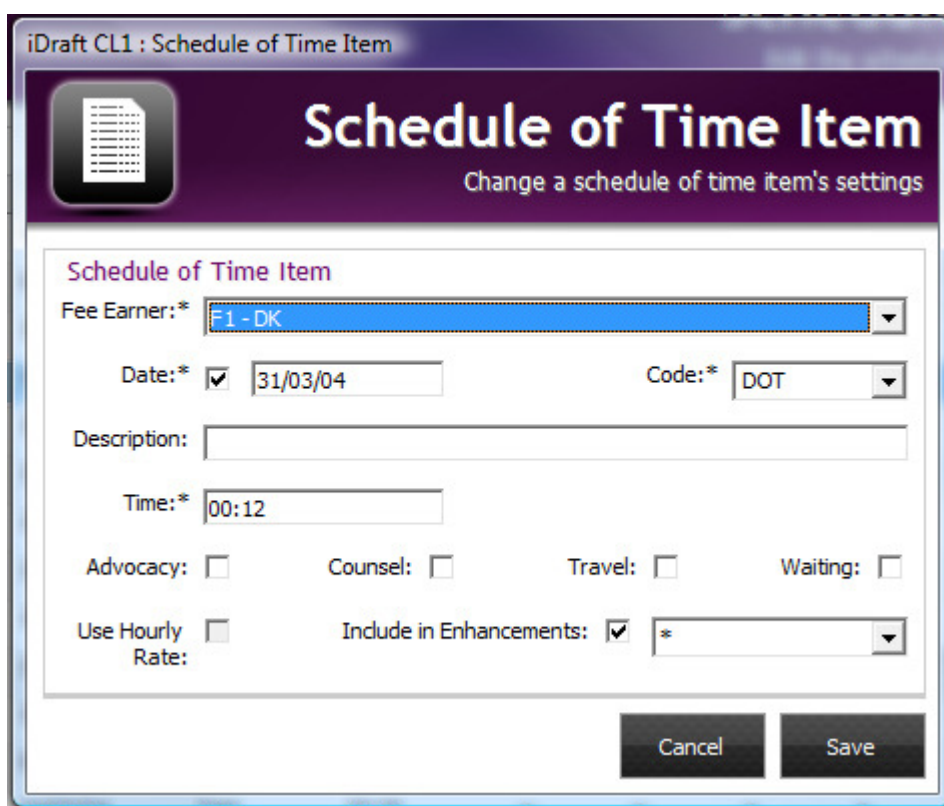
The Fixed Fee must be entered manually.

Once the Profit Costs (exc advocacy) and Fixed Fee fields are completed, clicking the Auto-Calculate Fields button will populate the Exceptional Case Threshold field with a figure 2x the Fixed Fee. The Exceptional Case tickboxes are then automatically ticked according to the Exception Case Threshold being greater or less than the Profit Costs (exc advocacy) field.

The remainder of this section is not shown, but is automatically generated based on entries within the Bill.

Bill

The Details of Work and Counsel Under FGF Sections consist of textboxes and tickboxes, each of which should be completed as per the relevant section of the form.
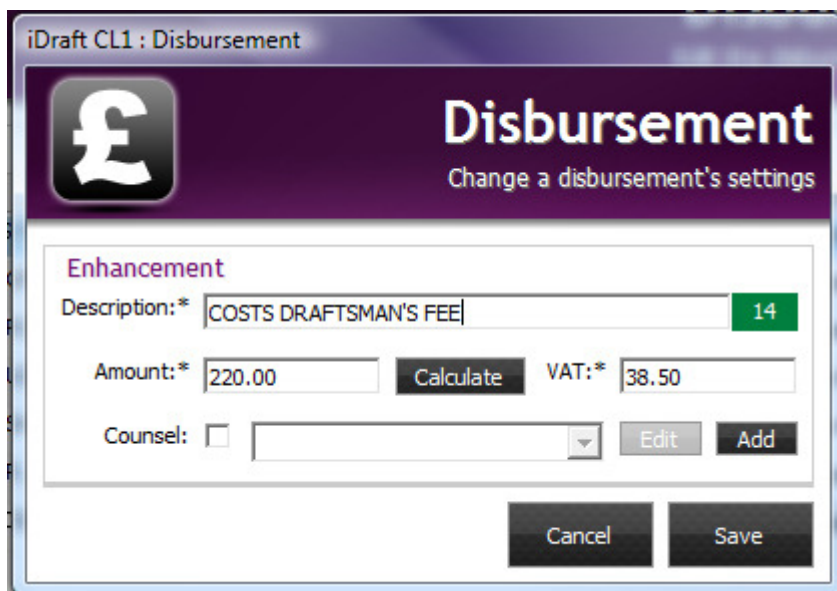
Schedule of Time

Click the 'Add' button or double-click an existing Schedule of Time item to edit. The following options are presented:

- Fee Earner: Select the item's Fee Earner.
- Date: Specify a date for the Schedule of Time Item.
- Code: The relevant code according to the CLS Coding Schedule. The time for this item will be moved to the appropriate column in the Bill depending on the code selected. This may be entered by selecting from the list or typing directly into the box
- Description: The description of work done. If left blank, no Additional Information item will be added.
- Time: The time taken by the Fee Earner.

- Advocacy: Applies the Fee Earner Group's Advocacy rate to the item unless Counsel, Travel, Waiting or Use Hourly Rate are also checked. This also marks the item as Solicitor Advocacy for the Actual Costs section of the Claim1A.
- Counsel: Applies the Fee Earner Group's Counsel rate to the item, overriding the Advocacy rate if Advocacy is checked.
- Travel: Applies the Fee Earner Group's Travel and Waiting rate to the item, overriding the Advocacy rate if Advocacy is checked. This item will also be moved to the Travel column of the Bill.
- Waiting: Applies the Fee Earner Group's Travel and Waiting rate to the item, overriding the Advocacy rate if Advocacy is checked. This item will also be moved to the Waiting column of the Bill.
- Use Hourly Rate: Applies the Fee Earner Group's Hourly rate to the item, overriding all of the above options.
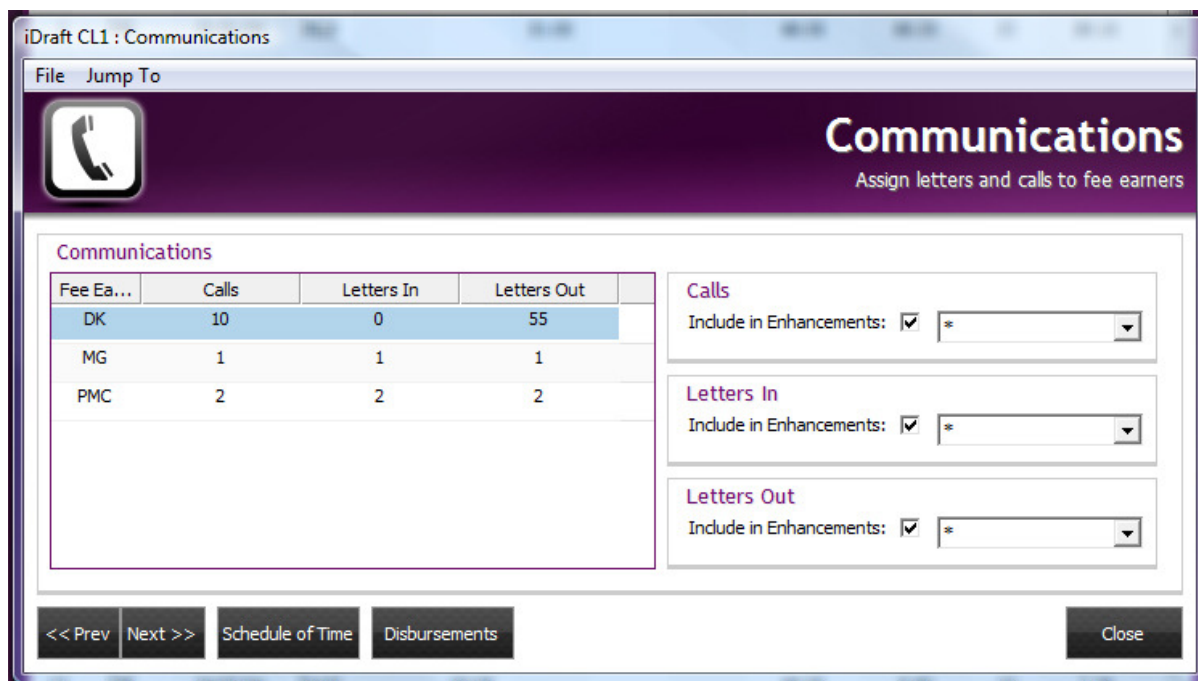- Include in Enhancements: Select a General Enhancement to use for this item.

Disbursements

Click the 'Add' button or double-click an existing Disbursement to edit. The following options are presented:

- Description: The description of Disbursement.
- Amount: The Disbursement value.
- VAT: The VAT value. Use the 'Calculate' button to auto-calculate. If VAT is left at 0.00 the Disbursement will appear in the Disbursements Not Subject To VAT section of the Bill.
- Counsel: Specify whether the Disbursement is a Counsel's Fee, and specify the Counsel. Click 'Edit' or 'Add' to change Counsel settings. (See Counsel section)

Communications

There are several ways to assign routine communications to a Fee Earner.

Firstly, ensure that the correct Fee Earner is selected, then:

1. Press 'C' to add a Call, 'I' to add a Letter In or 'O' to add a Letter Out.
2. Right-click on the relevant column.
3. Double-click the relevant column and enter the values manually.

To deduct from the item count, hold 'Shift' whilst undertaking 1 or 2.

Calls, Letters In, Letters Out Enhancements: Select a General Enhancement to apply to routine communications.

Preferences

The Preferences screen provides options for iDraft CL1's default settings.

- **General Settings**
  - Default VAT Rate: Will be automatically inserted into any new Form.
  - Auto Backup: When checked, the current Form will be automatically saved every 10 minutes to the path specified in the Auto Backup Path.
  - Auto Backup Path: The folder into which the Auto Backup function saves files. Click the 'Browse' button to search for or create a folder. Invalid paths will be displayed in red.
  - Auto-delete Backups: When checked, any backup files in the Auto Backup Path which have not been modified within 60 days will be deleted on running the program.
  - Auto-refresh Preview: When checked, on returning to the main screen the preview will be automatically redrawn.
  - Play Sound: Enable or disable sound.
  - Log Mode: When checked, major events within the program will be written to a log file on your hard disk. As it is a drain on resources it is recommended that Log Mode is only checked when recommended by an iDraft Technician.
- **Replacements**
  - Click the 'Add' button or double-click an existing Replacement to edit. The following options are presented:
    - Input Text: The 'trigger' text for the replacement.
    - Output Text: The text that will replace the Input Text.
- **Rate Sets**
  - Click the 'Add' button or double-click an existing Rate Set to edit. The following options are presented:
    - Name: The name of the Rate Set.
    - Other fields: See Rates in Fee Earners and Rates section.

Preview

The Preview function gives an accurate representation of the Schedule of Time and Additional Information. The Previews allow accurate checking of any work entered.

Previews are available via the Preview menu or by right-clicking on the Preview Area.

Export to Word

To export your completed Form to Microsoft Word simply choose the folder into which the exported document is to be saved, and click the 'Export' button.