

FROM ARITA'S DESK

A.B. SIMS, LLC

Time Analysis Issue

December 2005

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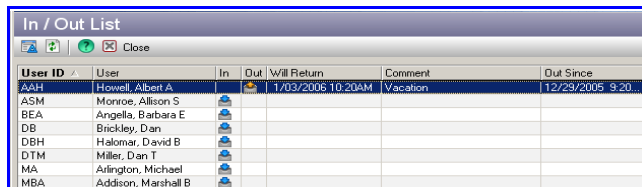
Time Matters/Billing Matters 7.0 Highlights

Impressive Feature set and Attractive Year-End Pricing

In September 2005, about a year after the release of Time Matters and Billing Matters/Billing Matters Plus 6.0, LexisNexis Time Matters published yet another impressive upgrade. Though you may be unpacking version 6, don't pass on version 7. The company has just followed up with Service Release 1 which provides even more exciting features and enhancements. Here are highlights:

In/Out Board

Time Matters lets you see who's in the office and who's not with the new In/Out Board. This function includes a reminder to signed out users to sign back in when returning to the office.

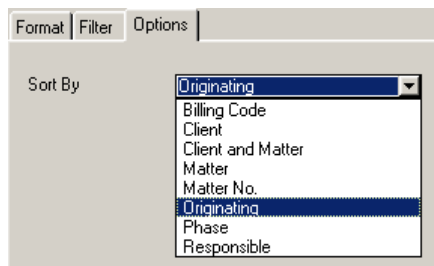


User ID	User	In	Out	Will Return	Comment	Out Since
AAH	Howell, Albert A			1/03/2006 10:20AM	Vacation	12/29/2005 9:20
ASM	Morroe, Allison S					
BEA	Angella, Barbara E					
DB	Brickley, Dan					
DBH	Halomey, David B					
DTM	Miller, Dan T					
MA	Arlington, Michael					
MBA	Addison, Marshall B					

In/Out Board

Billing Reports Expanded with Additional Sorts and Filters

Billing Matters users can now get productivity and other reports filtered by Originating and Responsible staff.



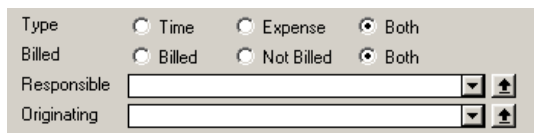
Format | Filter | Options

Sort By

- Originating
- Billing Code
- Client
- Client and Matter
- Matter
- Matter No.
- Originating
- Phase
- Responsible

Additional Billing Report Sort Options

Additional filters for Billed/Unbilled, Time/Expense/Both are now available for some reports. (See page __, Analyzing Staff time with Billing Matters). Still on my wish list are budget reports.



Type Time Expense Both

Billed Billed Not Billed Both

Responsible

Originating

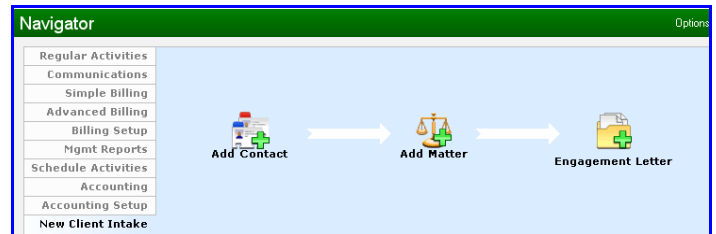
Additional Billing Report Filter Options

Contact and Matter Journals

See all records for a Contact or Matter on a single screen. You may set filters for which records are shown in each area of the Journal.

Customizable Navigators

Capture your work flow on custom navigators. This is a great way to help new staff learn their way around Time Matters/Billing Matters. Experienced staff can design a road map for daily functions. You may associate Auto Entry forms to further automate the Navigator buttons. In the example below, the Engagement Letter button opens a Document form pre-filled with the document code and description used for engagement letters.



Custom Work Flow Navigator

Expansion of Handheld Links

With Time Matters 7.0 you may synchronize Matters on the Treo and other Palm O/S devices. Prior to version 7.0, Matter synchronization on PDA's was limited to the Blackberry. (See *Time Matters Handheld Choices, From Arita's Desk June 2005*.) You may also enter Billing records on both the Treo and Blackberry, and send them to Time Matters.

Outliner Improvements

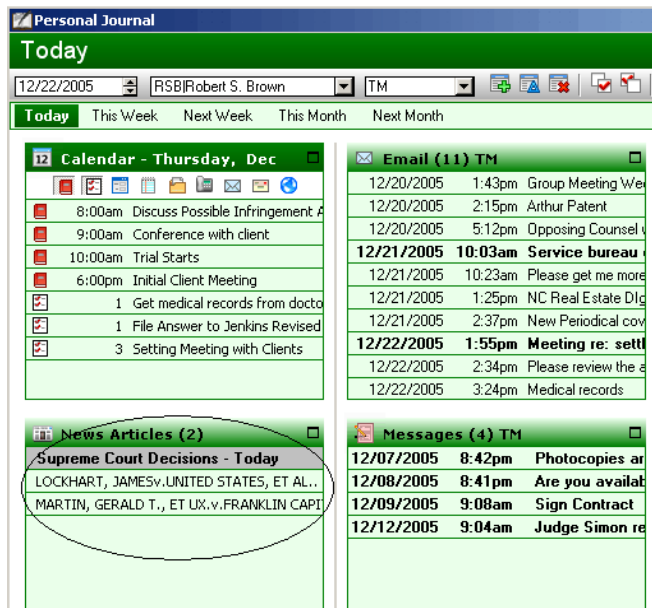
You can now mark outline items "Done" without associating them with a record. This was one of my wish list items. The Outliner was introduced in version 6.0. If you have not tried it yet, consider using it to outline an agenda for your next staff or partner's meeting. The Outliner includes a Send to Word button.

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View your favorite news, blogs and other RSS streams right from Time Matters! You may display the news in the Personal Journal, or in it's own window.



News Reader on Personal Journal

Year-End Sale -- Hurry!

Through December 31, you may order upgrades or new licenses of Time Matters / Billing Matters for 50% off the regular price. Contact me for further discounts.

Yes, I'm Certified

Time Matters AIC's undergo rigorous training and testing for each new version. I am happy to report that I am certified on all versions of Time Matters and Billing Matters. ❄

Coming Soon to Downtown Seattle

Two Half-Day Seminars

- ▶ Getting Started with Time Matters
- ▶ Getting Started with Billing Matters

Presenter: Arita B. Sims, TMCP, BMCP, BMPCP

For Pre-Enrollment, call 206-396-6390 or email arita@absims.com

Analyzing Staff Time with Timeslips

Where have all the hours gone? Use Timeslips' periodic reports for a quick glance.

Timeslips' periodic reports provide a view of time by day, week, month, quarter, or year—you pick the period. The reports provide a billable vs non-billable breakdown. Use the Productivity by Period report to see who's working and who's not. To find this report in Timeslips 2004 and higher, select Reports, Slips, Productivity by Period. You may show hours, dollars or both. In the sample below I chose to show dollars only.

12/29/2005 9:00 AM Willis & Henderson, P.C. Productivity by Period Page 1

Selection Criteria

Slip Classification Open
Slip Date 01/01/2005 - 05/31/2005

Timekeeper	Jan 2005	Feb 2005	Mar 2005	Apr 2005	May 2005	Monthly Totals
C. Harding						
Billable Fees	0.00	0.00	960.00	2120.00	1160.00	4240.00
Unbillable Fees	0.00	0.00	0.00	0.00	0.00	0.00
% Billable Fees	0.00	0.00	100.00	100.00	100.00	100.00
D. Brickley						
Billable Fees	780.00	1200.00	450.00	731.25	0.00	3161.25
Unbillable Fees	0.00	0.00	0.00	20.83	0.00	20.83
% Billable Fees	100.00	100.00	100.00	97.23	0.00	99.36
Grand Total						
Billable Fees	780.00	1200.00	1410.00	2851.25	1160.00	7401.25
Unbillable Fees	0.00	0.00	0.00	20.83	0.00	20.83
% Billable Fees	100.00	100.00	100.00	99.27	100.00	99.72

Timeslips Productivity by Period Report

Need to know how many billable hours were actually billed? Use the same report, but filter for Slip, Billed = Yes. The results are

12/30/2005 10:14 AM Willis & Henderson, P.C. Productivity by Period Page 1

Selection Criteria

Slip Classification Open
Slip Date 01/01/2005 - 05/31/2005
Slip Billed Yes

Timekeeper	Jan 2005	Feb 2005	Mar 2005	Apr 2005	May 2005	Monthly Totals
C. Harding						
Billable Fees	0.00	0.00	960.00	1920.00	0.00	2880.00
Unbillable Fees	0.00	0.00	0.00	0.00	0.00	0.00
% Billable Fees	0.00	0.00	100.00	100.00	0.00	100.00
D. Brickley						
Billable Fees	780.00	1200.00	450.00	450.00	0.00	2880.00
Unbillable Fees	0.00	0.00	0.00	0.00	0.00	0.00
% Billable Fees	100.00	100.00	100.00	100.00	0.00	100.00
Grand Total						
Billable Fees	780.00	1200.00	1410.00	2370.00	0.00	5760.00
Unbillable Fees	0.00	0.00	0.00	0.00	0.00	0.00
% Billable Fees	100.00	100.00	100.00	100.00	0.00	100.00

Timeslips Productivity by Period - Billed Slips Only

shown here:

You can see from the Billed Slips Only report that none of the time for May 2005 was billed, and only a portion of the April time was billed. Adjustments may also affect the figures on a Productivity report filtered for Billed Slips Only.

Continued on Page 4

Analyzing Staff Time with Billing Matters

Lists, Standard Reports, Report Designer, Timesheets, Send to Excel. There are almost endless approaches to viewing and reporting staff time with Billing Matters.

Billing Matters' Standard Reports menu includes a Staff Productivity Report that shows the time for each staff broken down by billable and non-billable. To access this report, select Reports, Standard Reports, Staff, Productivity.

Bill Date >= 1/01/2005 Bill Date <= 8/31/2005		Brown, Campos & Marshall LLC		Date Printed: 12/30/2005 Time Printed: 12:04PM Printed By: TM	
Productivity Report by Staff					
HOURS					
Staff	Hrs Worked	Billable	Non-Billable	Productivity %	
Albert A. Howell	4.00	4.00	0.00	100.00	
Allison S. Monroe	6.68	6.68	0.00	100.00	
Barbara E. Angella	12.10	11.60	0.50	95.87	
David B. Halomar	13.77	13.77	0.00	100.00	
Michael Arlington	9.30	7.00	0.50	93.98	
Marshall B. Addison	16.30	16.30	0.00	100.00	
Marilyn C. Campos	13.38	12.68	0.50	96.26	
Robert S. Brown	91.16	88.16	3.00	96.71	
Rebecca S. James	3.00	3.00	0.00	100.00	
Victor C. Marshall	7.00	7.00	0.00	100.00	
Report Total	175.69	171.19	4.50	97.44	

Billing Matters Staff Productivity Report

Here is a key to the Staff Productivity this report:

Hrs Worked	Total hours on billing items without regard to Charge Status or adjustments.
Billable	Total hours on billing items that have a Charge Status of "Billable" or "No Charge."
Non-Billable	Hours for billing items with a Charge Status of "Do Not Bill."
Productivity %	Billable divided by Hrs. Worked

Billing Matters' Profitability Report compares fees worked with their actual billed value. This report includes an Effective Hourly rate column. The report projects what profitability *will be if the bills are actually sent*. In Billing Matters you must create and posted a bill or invoice to *actually bill* time. A sample Profitability Report is shown in the next column. Access this report from the Staff tab of Standard Reports.

Bill Date >= 1/01/2005 Bill Date <= 8/31/2005		Brown, Campos & Marshall LLC		Date Printed: 12/30/2005 Time Printed: 12:49PM Printed By: TM		
Profitability Report by Staff						
Staff	FEES			HOURS		
	Fees Worked	Billed Value	Profitability %	Hours Worked	Hours Billed	Eff. Bill. Rate
Albert A. Howell	\$405.00	\$182.50	45.06	4.00	1.80	101.39
Allison S. Monroe	\$815.20	\$1,140.65	139.41	6.68	6.68	170.76
Barbara E. Angella	\$604.80	\$671.01	74.19	12.10	11.60	67.85
David B. Halomar	\$928.95	\$923.28	99.39	13.77	13.77	67.05
Michael Arlington	\$951.00	\$1,007.75	105.97	9.30	7.80	129.20
Marshall B. Addison	\$658.00	\$936.96	96.80	16.30	16.30	39.08
Marilyn C. Campos	\$2,146.25	\$4,027.74	187.66	13.38	11.88	339.04
Robert S. Brown	\$13,659.75	\$12,665.74	92.72	91.16	88.16	143.67
Rebecca S. James	\$100.00	\$100.00	100.00	3.00	3.00	33.33
Victor C. Marshall	\$975.00	\$2,358.92	241.94	7.00	7.00	336.99
Report Total	\$21,546.65	\$23,714.55	110.06	175.69	167.39	141.17

Billing Matters Staff Profitability Report

Collections: To see the income generated by each staff, use the Receipt Allocation report. You will find this report on the Transactions tab of Standard Reports. In this sample I filtered for Time only.

= 12:00AM		Brown, Campos & Marshall LLC		Date Printed: 12/30/2005 Time Printed: 1:02PM Printed By: TM		
Receipt Allocation Report by Staff						
1/01/1900 to 12/31/2050						
Staff	Fees		Expenses		Total	
	Billed	Paid	Billed	Paid	Billed	Paid
Angella, Barbara E.	\$326.00	\$184.63	\$0.00	\$0.00	\$326.00	\$184.63
Arlington, Michael	\$500.00	\$150.00	\$0.00	\$0.00	\$500.00	\$150.00
Brown, Robert S.	\$3,884.75	\$3,232.19	\$0.00	\$0.00	\$3,884.75	\$3,232.19
Campos, Marilyn C.	\$296.50	\$274.59	\$0.00	\$0.00	\$296.50	\$274.59
Howell, Albert A.	\$120.00	\$63.45	\$0.00	\$0.00	\$120.00	\$63.45
James, Rebecca S.	\$40.00	\$21.15	\$0.00	\$0.00	\$40.00	\$21.15
Marshall, Victor C.	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00
Report Total	\$6,167.25	\$4,926.01	\$0.00	\$0.00	\$6,167.25	\$4,926.01

Billing Matters Receipt Allocation by Staff

In addition to the reports presented here, you may also use QuickTabs and filters on the Billing list to display the information you need and use the Send to Excel button to send it to Excel for further analysis. You may also use the Timesheet to view individual staff time for any given week. The Billing Matters Report Designer lets you create custom reports. Standard Reports are not editable, but there are free Feature Packages of editable standard reports available. Contact me for details on downloading and installing these Feature Packages.



Analyzing Staff Time with Timeslips - continued from Page 2

Use the Profitability by Period Report to see the affect of adjustments, write-ups and write-downs on staff billed hours and dollars. This Profitability by Period report reflects a negative \$20.83 adjustment to D. Brickley's time for April.

12/30/2005 10:50 AM		Willis & Henderson, P.C. Profitability by Period					Page 1
Selection Criteria							
Slip Classification	Open						
Slip Date	01/01/2005 - 05/31/2005						
Timekeeper	Jan 2005	Feb 2005	Mar 2005	Apr 2005	May 2005	Monthly Totals	
C. Harding							
Slip Fees	0.00	0.00	960.00	2120.00	1160.00	4240.00	
Billed Fees	0.00	0.00	960.00	2120.00	1160.00	4240.00	
Difference Fees	0.00	0.00	0.00	0.00	0.00	0.00	
% Difference Fees	0.00	0.00	0.00	0.00	0.00	0.00	
D. Brickley							
Slip Fees	780.00	1200.00	450.00	752.08	0.00	3182.08	
Billed Fees	780.00	1200.00	450.00	731.25	0.00	3161.25	
Difference Fees	0.00	0.00	0.00	(20.83)	0.00	(20.83)	
% Difference Fees	0.00	0.00	0.00	-2.77	0.00	-0.65	
Grand Total							
Slip Fees	780.00	1200.00	1410.00	2872.08	1160.00	7422.08	
Billed Fees	780.00	1200.00	1410.00	2851.25	1160.00	7401.25	
Difference Fees	0.00	0.00	0.00	(20.83)	0.00	(20.83)	
% Difference Fees	0.00	0.00	0.00	-0.73	0.00	-0.28	

Timeslips Profitability by Period Report

On this report, "Billed Fees" refers to the value of the time *if it is actually billed*. In Timeslips time is *actually billed* when an invoice is printed and approved. Refer back to the first Productivity Report on page 2 and you will notice that "Billable Fees" on that report matches "Slip Fees" on the Profitability Report. Remember, on both reports, you must filter for Billed = Yes to see the time *actually billed*.

The last piece of the profitability equation is collections. Timeslips includes a Collections by Period report that breaks down receipts by timekeeper. You will find it on the Timekeeper (User, Attorney, etc) tab of the Reports List.

As you can see, you are not likely to find all you need to know about staff time in Timeslips from a single report. Timeslips 2006 offers a send to Excel option for most reports. Use this to compile and further analyze the Productivity and Profitability reports. Timeslips also offers a Crystal Reports interface. I will caution you, however, that using Crystal will require ongoing maintenance of the reports as you upgrade to new versions of Timeslips. Crystal is also a complex program. Any reports created with Crystal should be thoroughly documented. *

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Do You Need HotDocs ?

HotDocs is the most widely-used document automation software. It is appropriate for firms that need to move from simple mail merge tools such as those included with Word and Word Perfect, to a full-featured solution that handles optional clauses, IF.. THEN logic and presents an interview-like front end to the user. HotDocs does all this and more. Before you purchase HotDocs, answer the following questions:

1. Does the firm *frequently* produce similar documents?
2. Do these documents have text in common, but require certain variations from client to client?
3. Is it taking too long to produce these documents by your current method?

If you answered Yes to these questions, you firm is probably a candidate for HotDocs.

For more on making the document assembly decision, see *When Document Automation Makes Sense*, by Jim Eidelman: www.lawtech.com/WINDRAFT/when.htm.

Here are some guidelines for starting your document automation project:

1. Start with one practice area. Do not attempt to automate all of the documents at once.
2. Automate only those documents that meet the automation criteria—a positive answer to the three questions posed above.
3. Get all of the staff involved in the project. If you are starting with a department, get all of the staff for that department involved. Everyone will not be a forms author, but there is a role for everyone who works with the documents: reviewer, typist, content manager, to name a few.
4. Look for pre-programmed practice systems. There are several publishers of HotDocs forms that are programmed and ready to use. Find out if there are forms libraries available for the documents you want to automate.
5. Get consulting help. Last, but not least, bring in a HotDocs expert, especially if you plan to create your own practice system with HotDocs. They can train your staff or provide document coding assistance.

For more on managing a document assembly project, see "Unlocking the Power of Document Assembly," Law Office Computing, June/July 1999 by Mark Lauritsen and Alan Soudakof. (If you have pitched your older issues of LOC, contact me for a copy of this article.)

Printed Forms

If your documents are on pre-printed forms from the court or other source, HotDocs with PDF Advantage can automate those, too. Import a PDF copy of your form into HotDocs, and you can define fields right on the printed form. *

New Invoices by Email Policy

Effective December 1, 2005, I began sending invoices via email to the main contact person at your firm. Paper bills will be mailed on request.