CostsMaster

Draftsman

CostsMaster User Guide Version 6

CostsMaster User Guide Version 6

Printed: November 2024

Table of Contents

Chapter 1

Overview

CostsMaster - An Overview

What Is CostsMaster Draftsman?

CostsMaster Draftsman is a software tool for Costs Lawyers & Law Costs Draftsmen designed to assist them in the preparation of high quality costs budgets, statements of costs, bills of costs and case plans for assessment by the Court or the Legal Aid Agency.

The program is designed to be as quick to use as recording work with pencil and paper and dictation with the benefit of increased accuracy and control over the appearance of the finished bill.

The team behind CostsMaster have extensive experience of Costs Drafting - it is truly a tool written by draftsmen for draftsmen.

What is Quota Mode?

CostsMaster Quota is a slimline version of CostsMaster Draftsman that allows the user to produce costs budgets and statements of costs for summary assessment. Everything it does can also be done in Draftsman, but as it has far fewer features, some users prefer the simpler user interface.

Quota is included free of charge with Draftsman. A shortcut is installed with the program that will start CostsMaster Draftsman in Quota mode.

This user guide is mainly geared towards Draftsman, but has a separate section on the differences in Quota.

CostsMaster Versions

The program can function in different modes depending on the licence you hold:

Restricted Trial Mode

When you run the software without a licence, or with a trial licence that has expired or has no more free users, the program will run in restricted trial mode. This is designed for new users to evaluate the program to see if it meets their needs. The program will not expire and is fully functional but you are limited to recording 15 hours work.

Extended Trial Mode

For most people the restricted trial mode is more than sufficient for them to evaluate whether the program meets their needs. However we recognise that there may be occasions when recording 15 hours work per file is insufficient to let you fully evaluate the program. If this is the case we will consider giving you a trial which does not restrict the amount of work recorded but which will function for a limited period. For this we will need to send you a trial licence which contains the time restriction.

If you wish to apply for an extended trial please contact us at trials@costsmaster.co.uk giving your full business name and address together with the reasons why the standard trial mode is insufficient for you to evaluate the program. Please note that we are unable to send out extend trial licences to applicants who only give a free email address.

Standard Mode

This is the standard version of CostsMaster.

System Requirements

CostsMaster requires the following:

Operating System

64 bit versions of Windows from Windows 7 onwards including Windows Server.

Office Software for Bill Generation

CostsMaster generates its exported bills on disc in Rich Text Format (RTF), a document format designed for interchange of documents between different word processors. Whilst this should mean that any word processor will suffice, in practice each interprets the Rich Text Format differently and only Word provides full support.

Costs Budgets and electronic bills can also be exported in spreadsheet format (XLSX).

Microsoft Office is supported from Office 2007. CostsMaster will create exported documents with any version of Office 365, but with online copies of Office 365 the ability to automatically view documents after export is dependent on Windows' ability to launch the apps based on the relevant file extensions (.rtf, .xlsx). Should this not be possible to do automatically, it is always possible to view the files by launching the online application manually. There is also a workaround where the rtf file can be exported with a .doc extension.)

Display

Minimum 1024 x 768 Screen Resolution. Multiple displays are supported. High DPI displays are supported.

CPU

No special requirements. Any machine capable of running the supported operating systems should suffice. As with everything, the faster the machine, the better.

Memory

512MB - 1GB Ram (1 - 2GB recommended)

Hard Drive Space

100 MB free space on your hard drive

Chapter 2

Installation

CostsMaster Installation

Obtaining The Program

The CostsMaster software is available as a download from our web site www.costsmaster.co.uk. Obtaining the program in this manner always ensures that you have the latest version available. Updates are made available from time to time which are free to all current subscribers.

Downloading the program

When you click on the program on our web site you may be asked where you want to save the file. If you are upgrading it is important not to select the CostsMaster icon on the desktop as this will overwrite the program file and stop it working. We would recommend creating a folder on your hard drive, perhaps within "My Documents", into which you save all the files you download from the internet. An obvious name would be "Downloads" but you can call it whatever you wish as long as you can locate it after the download has finished.

Installing The Program

If you downloaded the file double click it to start the installation.

The setup program will now run. You will be asked where you want to install CostsMaster. The default is C:\Program Files\CostsMaster Draftsman, but you can choose any location on your hard drive.

The installation program will copy the program files to your hard drive. Other files will be copied to other locations. For full details of the locations of all CostsMaster files please see the section headed File Locations

The installation program will also create short cuts in the Start menu and on your desktop.

If you have obtained a full or extended trial licence you will now want to activate your copy. Please see the section on Licensing Methods for further details.

Updating The Program

You can upgrade the program to a more recent version at any time by

- downloading the latest version of the setup program from our web site.
- running the "Check for Updates" tool from the Help menu. This item will only be enabled if you have sufficient permission to perform the update.

When you upgrade, only the program files will be replaced - all your settings and documents will be retained.

Network Installation

CostsMaster can be installed on a Terminal Services network or on a virtual machine. Simply install the standard version as administrator.

There are licensing implications when running the program in this way. Further details can be found in the section on Licensing Methods.

Configuring CostsMaster

CostsMaster requires very little configuration once installed. Some features require communication between the machine running the costsmaster.exe and a remote location and will require you to configure any hardware and software firewalls to permit this:

Feature	Destination	Notes
email support from within program	www.costsmaster.co.uk	
notification of updates	www.costsmaster.co.uk	
licensing - individual product key	http:\\www.wyday.com https:\\www.wyday.com	
licensing - network product key	The ip address of the machine on which you are running the network licence server and the port which you specified when setting it up (default 13)	The machine running the licence server additionally needs the firewall configured to allow access to the two destinations mentioned in the section on individual product keys. Further details can be found in the Licensing User Guide.
licensing - online product key	The ip address and port of the licence server which we supplied to you.	
	www.costsmaster.co.uk	Optional - provides a mechanism for CostsMaster to request a check and restart of the online licence server in the event that a response is not received. If there is an issue with the licence server, this can resolve it automatically within 2-3 minutes.

Chapter 3

General Tasks

General Tasks

Running CostsMaster For The First Time

After installing the program you can start CostsMaster from one of the shortcuts that the installer will have placed on your system in the start menu.

Restricted Trial Mode

If you are running the program without a license the Trial window will appear. This has options to
a) Run the restricted trial.
b) Activate a purchased licence or extended trial
c) Purchase the software

Extended Trial Mode

If you have requested an extended trial licence, a window will appear showing you how much of the trial period remains.

Welcome Screen

In all other cases, and after closing the above windows, the Welcome screen appears. This has buttons that allow you to
a) Open a recent file (Alt + R)
b) Browse for a file on your hard drive (Alt + B)
c) Import work from a time recording system (Alt + I)
d) Start a new document based on a partially completed template (Alt + T)
e) Start a new completely blank file (Alt + N)
f) View the user guide (Alt + U)
g) Check to see if there are any updates available (Alt + C)
h) Close CostsMaster (if you started it accidentally). (Alt + X)

The welcome screen can also be viewed at any time by selecting the New File button on the main toolbar (or by going to File > New).

Selecting any of the above options (other than the last) closes the Welcome screen and shows the main CostsMaster toolbar.

This has buttons which give you access to the most commonly used functions in the program. The program is divided into logical sections relating to the divisions in a traditional bill of costs. Holding the mouse over a button will produce a hint as to the button's purpose but for full details please see the sections on Setting up The Bill and Recording Work.

At the bottom of the main tool bar is a status panel divided into four sections which show
• Recent events that have happened (such as exporting a document or

saving the file)
- The current part
- The current profile
- Whether the program is currently showing all features or only features relevant to legal aid, inter partes, Court of Protection or Central Funds.

These will be explained more fully in the following pages.

Tip of The Day

For new users the tip of the day window can be a good way to learn about the exciting new features in CostsMaster. This window is shown on startup (although you can opt for this not to happen by selecting the appropriate tick box on the tip of the day window), or from the Help menu on the main toolbar.

Inputting Information

The work you enter into CostsMaster Draftsman is held in a form that closely resembles the structure of a traditional bill of costs.

Each bill has sections for Fee Earners, Categories, Parties, Narrative, Parts etc. Each part has a section for Procedural Steps, Parties, Documents, Travelling & Waiting, Costs of Assessment etc.

Each of the sections is represented by a window which can be accessed in one of three ways:

From the menu on the main toolbar.

All functions within the program can be accessed this way.

From one of the buttons on the main toolbar.

Again all functions in the program can be accessed in this way but by default only the most frequently used buttons are visible. You can choose which buttons you would like on the toolbar in the Toolbar Settings window.

By using a keyboard shortcut

A keyboard shortcut is the quickest way to get to a particular function. CostsMaster provides a comprehensive range of shortcuts for the most frequently used functions. Please see the section on Keyboard Shortcuts for a full list of the shortcuts available. There is also a PDF file of available shortcuts installed with the program and accessible from the program folder in the start menu. This is designed to be printed on thin card and folded over where it can be placed on your desktop for easy reference.

Full details of the available windows and their usage can be found throughout this guide, particularly in the sections on Working With Windows, Setting Up The Bill, and Recording Work.

Specifying Colours

CostsMaster allows you to specify colours for different items such as column backgrounds. Where this is available the colours are chosen by clicking the button next to the colour swatch. This opens the Colour Picker window.

The Colour Picker Window lets you select one of 16 million available colours. Colours are made up of a combination of red, green and blue elements, each of which can have a value of 0 to 255. The original colour you started with is displayed in a swatch on the bottom left of the screen with the new colour you are selecting to its right.

If you know the red, green and blue values of the colour you want you could type these directly into the relevant boxes in this window. More likely you will want to experiment with different colours. For each of the basic elements there is a slider that you can move to "mix" the quantities of red, green and blue. You can also drag the mouse around on the colour spectrum.

The colour spectrum represents a mix of two of the three basic colour elements. The third element is represented by the bar down the left-hand side. By default the spectrum shows the mix of red through to green (with the blue element being controlled by the side bar) but you can change this by selecting an alternative value from the drop-down box above it. Dragging the mouse around this spectrum will let you select the exact shade of colour you require.

Working With Windows

Working With Windows

The main CostsMaster toolbar gives access to the other windows via the menu at the top or via the buttons (which can be customised using the Toolbar Settings window)

Most windows that allow you to record work have a grid where data can be entered. Please see the section on Working With Grids for further information.

There are two different types of window in CostsMaster, those that can be left open while you work on another part of the program and those that must be closed before you can proceed further.

Windows that can be left open

Most windows with grids can be left open while you work elsewhere. These windows will update their information if data in another part of the program changes.

For example if you have the documents window open showing documents recorded in the current part and you move to the parts window and change the current part, the documents window will change to show the items recorded in the newly selected part.

Any information you input into these windows is applied immediately. e.g. if you add an attendance and enter 30 minutes for the time the running totals in the control centre will update to reflect the new total.

To close the window simply click on the close button at the bottom of the screen.

There is also a help button which will bring up the page from this guide which is most relevant to the window.

Windows that must be closed before you continue

Some windows must be closed before you can make changes elsewhere. Such windows include those relating to options as well as edit windows for each grid.

For the most part changes on these windows are not applied until you click the OK button and you are given the option of abandoning any changes made by clicking the cancel button. However there are some cases where changes to data are applied immediately (usually because the change needs to be made in order to update other information on that page). For example, using the auto-complete Shift + Enter function to complete rates and enhancement requires the values to be stored. Clicking the cancel button after performing such an operation will not undo these changes.

These windows also have a help button which will bring up the page from this guide which is most relevant to the window.

When one of these windows is open only the following shortcuts will be available:

- Shortcuts concerned with time recording
- Saving (including Save As)
- Help
- Any shortcuts relevant to the window itself

Closing Windows

In addition to clicking the OK / Cancel / Close buttons you can close any window using the keyboard shortcut

Alt + Enter

This is the same as clicking the Close or OK buttons. For windows which must be closed before you can continue, the shortcut

Shift + Alt + Enter

is identical to clicking the Cancel button.

Working With Grids

Introduction to grids

Grids are used extensively throughout CostsMaster as they provide a flexible means of recording work. Each item is shown on a separate row. Items have various fields that differ depending on the type of item. Each field is represented by a different column.

Most items have more fields than can be comfortably shown in a grid. By default, lesser used columns are hidden leaving only those that are required frequently by most users. It is possible to access hidden fields either by enabling the column for that field or by viewing all fields in the edit window for the grid. In addition a complete list of available fields for a grid can be seen by clicking the top left column of a grid or using the shortcut

Ctrl + Shift + K

Clicking a field in this list will take you to the column for that grid or, if it is hidden, to the edit window.

To get back to this help page from any grid please use the following shortcut:

Ctrl + Shift + ?

All grids have a set of buttons along the top that let you manage the items in the grid. Full details can be found in the following sections:

Adding & deleting items

New Item	Ctrl + Shift + N
Insert Item	Ctrl + Shift + I
Delete Items	Ctrl + Shift + D

Items can be added either to the end of the grid by clicking the New button or above the currently selected item by clicking the Insert button. Inserting items is not possible when more than one item has been selected. When the grid is in Multi select mode adding an item automatically opens the edit window for that item

The currently selected items can be deleted by clicking the delete button.

Moving items within the grid

Move Up Ctrl + Shift + ↑

Move Down Ctrl + Shift + ↓

The currently selected items can be moved up or down one position by clicking the move up / move down buttons.

Alternatively items can be dragged to a new position in the grid with the mouse or even to a completely different grid provided the type of data displayed in both grids is compatible. All attendance grids are compatible with each other as are all disbursement grids.

To move an item or items by dragging it is necessary for the grid to be in multi-select mode and then to hold down the ALT key in order to signify that you intend to move an item rather than select it.

Each of these methods behaves slightly differently if you have multiple non-consecutive items selected, i.e. you have used the Ctrl key to select more than one item and at least two of the items have a row between them that is not selected. In this case, if you use the up / down arrow buttons each item will be moved up or down by one position. However if you drag them on to an existing item they will all appear consecutively after that item.

Copying and Moving Items to different locations

Right Click Method

In CostsMaster there are two different ways of copying and moving items to a different part or location within the program. As well as Cutting, Copying and Pasting, you can right click on an item or a group of selected items and select the destination from the pop up menu that appears.

Using this method, you can copy or move items to a different part or to a different location within the same part. Should you want to move items to a different location within a different part using this method it would have to be accomplished in two stages.

If moving items to a procedural step or party, a box will appear listing all the current procedural steps and parties from which you can select the desired location. In addition, for procedural steps, there is an entry labelled "<Create New Procedural Step>" which, will move your items to a new step that will be created for the purpose.

When moving items to a part, the currently selected part is greyed out, but when copying it is not, meaning you can use this method to make a copy of an item in the same location.

This method is not available when the **Show Work From All Parts** option is selected in the Control Centre.

Drag & Drop Method

Alternatively items can be dragged to a new position in the grid with the mouse or even to a completely different grid provided the type of data displayed in both grids is compatible. All attendance grids are compatible with each other as are all disbursement grids.

To move an item or items by dragging it is necessary to hold down the ALT key in order to signify that you intend to move an item rather than select it.

To copy an item or items by dragging it is necessary to hold down the CTRL key as well as the ALT key.

Cutting, copying & pasting items


Cut Ctrl + X


Copy Ctrl + C


Paste Ctrl + V

The currently selected items can be cut or copied to the CostsMaster clipboard by clicking the cut or copy buttons. These buttons behave differently depending on whether the grid is in multi select mode. When not in multi select mode the Cut and Copy buttons apply to selected text, but in multi select mode they apply to the entire item.

To paste text or an item or items that have been cut or copied to the CostsMaster clipboard click the Paste button. The paste button is enabled whether or not the grid is in multi select mode but only when there is compatible data in the CostsMaster clipboard. Pasted items will appear in the grid immediately before the currently selected item.

Cutting and copying items in this way will only allow you to paste them within CostsMaster - they will not be available to external applications.

Please note that Cut/Copy/Paste are not available in the Part Attendances and Part Disbursements grid, nor when Show Work For All Parts is turned on.

Pasting items to grids can only be done when the items on the clipboard are the same type as the grid.e.g. it is possible to copy an attendance from Documents to Party Long Telephone Calls but not to Miscellaneous Disbursements. One exception to this is when you attempt to paste attendances or disbursements into a procedural step. Here a new step will be created and the attendances or disbursements pasted within it. When pasting an item to an incompatible location you are warned that this is not possible.

Editing

 Ctrl + Shift + E

Editing directly in the grid

Editing items directly in the grid is only available when the grid is **not** in multi select mode.

Most columns in a grid can be edited directly by typing in the grid or by selecting an item from a drop-down box. The data you type into the grid is generally validated and saved when you exit a cell. Different columns have different methods of editing data depending on the type of that data. The different ways of editing are:

Ordinary Edit
This allows you to type text directly in the grid. It is typically used for textual descriptions. If there are presets associated with the type of column you are editing they will be suggested automatically as you type. It is also possible to cycle through the presets using the Ctrl + Alt + ↑ or ↓ shortcuts or to view the available presets using the Alt +↓ shortcut .

Drop Down Edit
Also known as a Combo Edit, this allows you to choose from a list of pre-defined values that appear when you click the arrow to the right of the box. For some columns you have to select one of the options but for others the options are suggestions and you can also type something different directly in the box. When you type in the box and items from the list that match what you type are suggested to you. The drop down list can be shown using the Alt +↓ shortcut and you can cycle through the list of possible values without dropping the list by using the Ctrl + Alt + ↑ or ↓ shortcuts. When selecting an item from the drop down list for some columns, the data is validated immediately rather than when you exit the cell..

Spin Edit.
This is a box that you can type in that also has up and down buttons that increment or decrement the value in the box. It is typically used for columns showing whole numbers. You can cycle through the incremental values by using the Ctrl + Alt + ↑ or ↓ shortcuts.

Button
Some columns represent data that cannot be directly edited in a grid. These columns will have a full button in the cell that when clicked will open a window where detailed information can be entered. For some columns this new window will contain a separate detailed grid.

Edit Button
This is a box with a button to the right of it. This is similar to the Button but it also has a box that displays a value. This is used for some columns where the text displayed is a summary of that contained on the detailed window. For a

few columns the text can be altered directly and where this is possible the value entered will be the most commonly used out of the full possibilities available in the separate window.

Properties

Properties can be changed by clicking the relevant button on the Properties toolbar, by clicking in the properties column and selecting the item from the drop down list, or by using the appropriate keyboard shortcut. If you are in the Properties column you can make the list of shortcuts appear using the Alt +↓ shortcut. If you use the button or shortcut and have more than one item selected each property will be toggled, that is to say if it was previously on it will be changed to off. So if you select three items, the first of which is excluded and the other two are not, after clicking the exclude button the last two will be marked as excluded whereas the first will not.

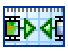
To move between cells you can use the tab key. The enter key accepts the current suggested text of a dropped down item and moves to the next cell. To add a hard carriage return to text use Ctrl + Enter.

Editing via the Edit window

You can also view and edit all fields for an item in the Edit window. This is useful as you can view (and change) the settings of columns which are hidden because you use them infrequently.

If you select multiple items and click the edit button you can change the data for all items in one go. To do this, put the grid into Multi-Select mode, select the items and click the edit button. The window will show blank controls for any data that has different values. However you can change any item and all selected items will then have that value. Any field that is not altered will not be changed. It is easy to, say, change several items to a different fee earner in this manner.

Merging Items

 Ctrl + Shift + J

Using this feature, the currently selected items can be merged together into a single item.

When items are merged each field within the item is considered separately and CostsMaster attempts to create a meaningful merge of the data. Some fields, such as descriptions and other text fields, will have the text of the items added one after the other. Other fields such as time will have their values added together and some, such as start and end dates will take the earliest or latest as appropriate. There are a few fields which can not be merged meaningfully and for these the value of the first item will remain after the merge.

Merging items can only be done when the grid is in multi-select mode and when more than 1 item has been selected. When merging parts you will be presented with the Merge Parts wizard.

Merging Parts

When you attempt to merge two or more parts you will be presented with the Merge Parts Wizard. This window will take you through a series of questions in order to establish how the work in the selected parts should be merged.

Please note that as well as physically combining parts, it is also possible to combine them dynamically when exporting a bill.

Claim Work At Different Rates

This page lets you decide whether you wish the work in the merged parts to be claimed at different rates after the merge.

The options on this page might seem a little frightening at first but once you think about the implications of merging parts you will understand the options better.

Because CostsMaster lets you define different rates for a category for each part you may try to merge two or more parts where work is recorded against the same fee earner but claimed at different rates. Were you to simply merge all the work into a single part it would be recorded against the same fee earner and you could no longer distinguish between it in order to claim it at different rates.
CostsMaster takes care of this situation for you by giving you three options:

1. Maintain a distinction by creating separate fee earners

If this option is selected for each part being merged, a separate fee earner will be created for each fee earner used in a part being merged. As you can imagine, in a complex bill this can leave you with a large amount of fee earners, some of which are unnecessary if you only want to claim the work at differing rates.

However, this option is useful if, for any reason, you wish to be able to identify each piece of work by the part it was originally in, e.g. if you are claiming work covered by multiple statute bills in a single part because the indemnity principle has not been breached, you may want the comfort on assessment of being able to identify which work was covered by which statute bill.

After merge the additional fee earners will all be assigned to the same category that the original fee earner was assigned to. You must create any additional categories that you need and assign them appropriately.

2. Maintain a distinction only where assigned rates change

This is the preferred option if you simply want to claim the work in the parts being merged at the rates they are currently being claimed. With this option selected, CostsMaster automatically creates fee earners only where the rates being claimed are different.

For example, you have work recorded against fee earner ABC in each of three parts which you now wish to merge, ABC is assigned to the partner category and you have defined rates for Part 1 of £180, Part 2 £180 and Part 3 £200. When the parts are merged the work in parts 1 and 2 will be merged and assigned to ABC but the work in part 3 when merged will be assigned to "Copy of ABC".
In order for CostsMaster to be able to do this you must have already assigned a category to each fee earner and have set up the rates appropriately for each category. CostsMaster will only create additional fee earners if you have defined differing hourly rates for the categories. In deciding whether to create new fee earners CostsMaster only considers the hourly rate.

Additionally CostsMaster can create the appropriate categories to match these fee earners. Please see further down the page for details.

3. Do not maintain a distinction and merge all work.

This part should be chosen only if you are certain that after the merge you will not want to distinguish between the work that was formerly in different parts for any reason. With this option no additional fee earners will be created and all work in the merged part will be assigned to the original fee earner.

Create Categories

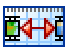
This next page appears only if you have chosen the option to maintain a distinction between work only where assigned rates change on the previous page AND if the rates for one or more selected parts are different.

Here you can opt to let CostsMaster create additional categories automatically to match the new fee earners. Alternatively you can choose to do this manually afterwards.

Sort Items

The next page gives you the option to sort the merged work. By default the work being merged is appended to the previous parts but you can opt for it to be sorted in date order.

Spliting Items (Parts)



At present the Split Items function applies only to certain types of data.

Splitting Parts

This will let you split a part into two with all work prior to a given date remaining in the original part and all work from that date being moved into a new part.

Not all work can be split in this way. Standard telephone calls, letters out, emails out and letters in without dates will remain in the first part. Other undated attendances will be placed according to the date of any preceding item, which will keep these items in the correct order. Any undated items that do not have a preceding dated item will be placed in the new part.

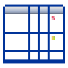
The program will attempt to divine the intended date from any partially recorded dates but this will only be successful if there is enough information recorded. Partially recorded dates near to the split date may be interpreted incorrectly and will need to be dealt with manually.

When you split a part you will be presented with a window into which you can type the date at which you want to split the part. Click OK and the program will automatically split the part for you. The part names will be amended to add a description of the date at which the parts were split. This is for identification purposes only and you can rename them afterwards.

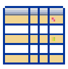
Splitting Routine Items

This function applies only to attendances where the rate type is set to one of the routine rate types (Letter In, Letter Out, Telephone Call etc.). It allows you to split a single attendance consisting of multiple routine items into separate attendances each with a value of 1. So for example, if you have an attendance recording 6 telephone calls, after running this function that would be replaced with six attendances, each having one telephone call. This can be useful if you want each attendance to show separately in the exported document.

Viewing data



Expand Rows Ctrl + Shift + <
Contract Rows Ctrl + Shift + >



Show Bands Ctrl + Shift + B

Expanding & Contracting

Often, the amount of data in a grid cell is larger than the space available. It is possible to expand the rows of a grid to show all the text in a cell by clicking the expand button. However, fewer rows will be visible. If you want to see more rows the process can be reversed by clicking the button again.

If all the data in a grid cell is larger than the cell can handle it is possible to view it by hovering the mouse over the cell.

Displaying Bands

The Show Bands button displays alternate rows in the grid in different colours. This can make the grid easier to read.

See Also
Customising the grid
Selecting multiple items

Selecting items

Multi-Select Mode Ctrl + Shift + M

Select All Ctrl + Shift + Q

By default grids are placed in direct edit mode allowing you to type directly in the grid. In this mode it is not possible to select more than one item at a time. To do this you must place the grid into multi-select mode by clicking the multi-select button. In this mode it is not possible to directly edit text but data for one or more items can be edited via the edit window.

In multi select mode it is possible to select one or more rows. Multiple consecutive rows can be selected by clicking on the first row, then whilst holding the Shift key, clicking on the last row, by clicking on the first row and using Shift + Up/Down arrow to select the range of items, or by using the scroll wheel on a mouse. Multiple non-consecutive rows can be selected by selecting the first row then, whilst holding the Ctrl key, selecting each of the other rows in turn.

It is also possible to select all items in a grid by clicking the Select All button or using the assigned shortcut. When using this function the grid will be placed in multi-select mode if it is not already in that state.

Notes

Ctrl + Shift + O

Notes can be defined for each row in a grid. Clicking the Notes button will open a new window with a grid in which the notes are listed.

When a row has notes defined the properties cell for that row will display a small orange triangle in the top right-hand corner. Hovering the mouse over the properties cell will display the notes for that row in a hint window. Any private notes will be displayed in parenthesis.

Please see the section on Notes for more information.

Extended Characters

Ctrl + Shift + H

If you need to type a character that does not appear on your keyboard you can view the available characters by clicking the above button.

This will open the Extended Characters window which displays a grid of all available characters for the currently selected font. There are three ways to insert a character at the current cursor point in the grid:

- Click the character you want to include, then press the "select" button.
- Double click the character you want to include.
- Navigate to the character you want with the arrow keys and press the Enter key

When you click on a character it is displayed in the lower right corner of the window together with its extended key code. If you use an extended character frequently you can insert it without opening the extended characters window by holding down the ALT key and entering the 4 digit extended code (with leading zeroes).

Properties

Most items displayed in grids have what we call properties. These are items that are either on or off. For example attendances can be excluded or marked as estimated. These items are displayed as icons in the properties column of the grid.

Properties can be set in one of five ways:

- You can click the relevant button in the toolbar.
- You can use the shortcut for the relevant item.
- You can click the edit button and change the property in the edit window.
- You can click in the properties column with the left button and select (or de-select) the item from the list
- If you are in the properties cell the Alt + ↓ shortcut will drop down the list of available properties (which can then be selected using the up and down arrows and the enter key).

If multiple items are selected the first three methods will toggle the property of all selected items.

In the grid, properties can be displayed one after another or aligned in columns depending on the option to *show property icons in columns* in the local settings window. Whichever option is set, you must take care to ensure that the width of the properties column is sufficient for your needs because if the grid is not expanded and there is insufficient space for all properties, those outside the column will not be seen. By default the width of each properties column is sufficient to display each property.

Properties common to many types of data

Draw Attention Ctrl + Shift + W

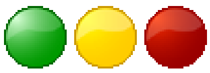
This allows you to flag items that require your attention in some way.

When you mark an item as requiring attention any items that include the marked item will appear with a greyed out icon to indicate that an item at a lower level requires attention. This avoids the likelihood of outstanding items in remote locations being overlooked.

Excluded Ctrl + Shift + X

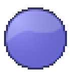
An excluded item is never exported and its value is not counted towards the running totals. This allows you to record items that may or may not be claimable and decide later whether to include them or not.

When an item is excluded it follows that any items within it are excluded also. Therefore when you exclude an item any items within it will be shown with a greyed out icon to indicate that they will be excluded but as a result of the setting of an item higher up the chain.



Recoverability Ctrl + Shift + 9 / 5 /1

This property will let you tag an inter partes item with three levels based on its chances of recovery. Please see the section on Recoverability for further details.



Solicitor / Client Ctrl + Shift + 0

This property will let you tag an item as unrecoverable from the Paying Party.

Legal Aid Ctrl + Shift + L

For bills covering both legal aid and inter partes costs this indicates items claimable solely from the Legal Aid Agency. This can be applied to Categories and Counsel, or to individual Disbursements.

Attendance properties

Estimated Ctrl + Shift + S

Attendances for which no time is recorded can be marked as such in the exported bill

Print Out Time Ctrl + Shift + P

This is intended for items where there is no file note but there is an entry on the print out from a time recording system.

Additional Info Ctrl + Shift + F

The description for this item will appear in the table of additional information in a CLAIM1 form.

Disbursement properties

Estimated Ctrl + Shift + S

Disbursements for which no invoice or fee note exists can be marked as such in the exported bill

Expert Fees Ctrl + Shift + T

For disbursements representing expert fees.

Expert Fee Authorised

For disbursements where the LAA has authorised the expert to exceed the hourly rate.

Invoice Ctrl + Shift + V

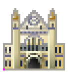
For disbursements for which an invoice exists.

Paid Ctrl + Shift + P

For disbursements which have been paid. This can be set automatically when the word "paid" is typed in the description column.

Receipt Ctrl + Shift + R

For disbursements for which a receipted invoice exists.



Court Fees Ctrl + Shift + U

For Court Fees, which are given special treatment in Costs Budgets.

Counsel Properties

Leading Counsel Ctrl + Shift + Q

Leading Counsel are given special treatment in Events-Based Case Plans and Costs Budgets. It is also possible to show Fees for Leading and Junior Counsel separately in the Control Centre.

FGF Ctrl + Shift + F

Mark the selected Counsel as being paid under the Family Graduated Fee Scheme.

Notes Properties

Private Ctrl + Shift + P

Indicates that the note is private to the draftsman and should not be included in any exported document.

Parts Properties

Claim VAT Ctrl + Shift + V

Claims VAT on the costs in this part.

I P **Incurred / Pre-Budget**

A B **Anticipated / Budgeted**

V **Variation**

N **Non-Budgeted**

These mutually exclusive properties replace the old "Anticipated" property and are used to specify whether the costs in a part are incurred or anticipated, or how they relate to an existing Costs Budget.

Procedural Steps Properties

Pre-Agreed

The costs for this Procedural Step have been agreed in advance with the LAA.

FGF

Claim Counsel's fees for this Procedural Step under the Family Graduated Fee or Family Advocacy Scheme rather than as Events.

Parties To The Action Properties

Client Ctrl + Shift + C

Specifies that this party to the action is also a client. When a party to the action is a client it is possible to record extended information for them together with extra information such as their legal aid certificate details.

Legal Aid Certificates Properties

Full Details Ctrl + Shift + F

When this property is selected the certificate item will appear on the front sheet with full details of the scope and limitation, whereas normally this information is not exported.

Success Fee Properties

Limited Ctrl + Shift + L

The amount of this Success Fee will be limited to a certain percentage of the damages. Setting this property enables you to define the percentage and amount of damages.

Checking spelling

Each grid now has a live spelling checker that will mark mis-spelt words in the grid with a squiggly red line. By default only columns that are likely to have unique alphabetic text are checked, but it is possible to enable spell checking for any column you wish in the column settings window for a particular column.

To obtain suggestions for a mis-spelt word simply right click on the word in the grid. A pop up menu will appear with a list of possible suggestions for the mis-spelt word. Clicking one of the suggestions will replace the word with the suggestion.

Live spelling in grids can be turned on or off for all grids in the Local Settings window, Spelling page.

Filtering data

The grid can be filtered to show only certain rows that match a condition that you define. When the filter option is turned on using the button on the toolbar, an additional row appears at the bottom of the grid, coloured yellow. Any text typed into the filter row causes the grid to show only matching rows. So, if you type "statement" in the filter row of the description column, only entries where the description contains the word statement will be shown.

In addition to simply matching text, it is also possible to use comparisons such as > (greater than) or < (less than) etc. These are useful in numerical columns to show, say, items with time greater than 1 hour. Note that such comparisons are performed in terms of minutes or Standard Items: i.e. ">15" in a Time/No column will select all items with more than 15 minutes recorded, or more than 15 Standard Items.

Adding a new item when the filter is enabled will result in the Edit window for that grid being displayed even if the grid is not in multi-select mode. If the newly created item does not meet a filter condition and would therefore be hidden, the filter is disabled to allow the new item to remain visible; otherwise the filter is re-enabled.

If you edit one or more rows using an Edit window, accepting the changes will result in the filter being reapplied.

Moving around the filter row works the same as for any grid row, with a couple of additional shortcuts: Ctrl + PageDown will move from the regular grid to the filter row, and Ctrl + PageUp will move from the filter row back to the regular grid.

Filtering on properties

You can set filter conditions to display only rows with or without particular properties. Click in the properties column of the filter row and select a property from the list: the icon will be displayed. If you hold down the Ctrl key when clicking, the icon will be displayed with a large X through it: this will select rows without that property.

If you select several properties, only rows with (or without) all the selected properties will be displayed.

Viewing Filtered items in context

Sometimes, you want to use the filter to find things, but also need to see them in the context of the wider data. An example might be where you filter to see documents items that contain the name of an expert, but you then want to check the other items recorded around the same time as each. You can do this by setting up the filter as above, but then turning the filter off. Now, you can use two shortcuts, Ctrl + Shift + Y and Ctrl + Shift + Z to jump between the items that match the filter condition whilst still having all items visible.

Advanced filtering

The basic filtering described above allows you to filter on one condition per column. Sometimes you may need more than this, for example if you wanted to show items dated within a known period. The grid settings window now has an additional filters page where it is possible to set up multiple filters. This page can be accessed quickly by clicking the filter icon on the left most column. Here you can add as many filters per column as you wish. By default all filters are cumulative (AND) but it is also possible to specify a range of alternatives that can be met (OR) and to specify if the match should be case sensitive.

Each filter (except a property filter) has three main components, which are mandatory, and two extra options:

Column is one of the columns available in the current grid, regardless of current visibility (i.e. columns which are hidden but not disabled)

Op is one of the seven possible operators:

[..]	matches if **column** contains **match** (note that this compares the text: "5" will match "5:00" or "150")
=	matches if **column** is exactly the same as **match**
<>	matches if **column** not the same as **match**
>	matches if **column** is strictly greater than **match**
>=	matches if **column** is greater than or the same as **match**
<	matches if **column** is strictly less than **match**
<=	matches if **column** is less than or the same as **match**

Match is the text to be matched against **column**

Case Sensitive determines whether "a" matches "A": if ticked then no.

Join determines how this filter interacts with previous filters (only available for second and subsequent filters):

AND	will show the row if this filter matches and the previous filters did also
OR	will show the row if this filter matches as well as if the previous filters did also

A property filter can be **Joined** with other filters as above: it only has the **Column** and **Match** components: the latter will hold one or more properties, all of which need to match. The **Case Sensitive** option does not apply.

Sorting data

Data in the grid can be sorted by any column by clicking on the column heading whilst holding the Ctrl key. Clicking once sorts the column in ascending order, clicking twice sorts it in descending order. A small blue triangle appears in the heading for any column that is sorted, pointing upwards if the sort is ascending or downwards if it is descending.

If there are many identical entries in a column being sorted you can apply a second (and subsequent) sort by clicking on another column heading whilst holding the Shift key. When you do this the sort indicator contains a number indicating the sort precedence order. You can repeat click a column whilst still holding the Shift key to change the sort order for that column.

Please note that some grids, such as the rates grids, cannot be sorted as their order is pre-determined by the order of parts.

If you ctrl + click on the top left most column header a small pop up menu will appear giving you two options:

Undo Sort

This will make the grid revert to the state it was in immediately prior to the last sort operation. Please note that this function will operate only once and it is not therefore possible to undo two successive sort operations.

Sort by natural order

When items are entered into CostsMaster the date and time they are created is stored with them. This makes it possible to sort items by the order they were entered. This can be useful if you need to go back through a file which may be out of order to check the work that has been recorded.

Because CostsMaster uses the creation date to determine the natural order, it is possible to view attendances and disbursements from multiple locations by natural order in the part attendances and part disbursements windows.

The creation date is accurate to the nearest second. This means that if you create two attendances in very quick succession (by using a keyboard shortcut) they will effectively have the same natural order and their order when sorted by natural order will vary. This is considered to be acceptable in normal usage.

Customising the grid

It is possible to alter the size of each column by dragging the column heading at its right edge. Furthermore the position of each column can be changed by clicking and dragging the column heading whilst holding the ALT key. The position and size of each column is stored and remembered for future use.

Further properties can be set in the Grid Settings window.

In addition each column has a set of Column Settings that can be edited by users.

Grid Settings

Ctrl + Shift + G

The Grid settings window lets you define the appearance of the grid as a whole. It is divided into three sections:

Appearance

The appearance of all grids is defined in the Local Settings Window but you can opt to override the global settings for a particular grid.

Font	This sets the font for the grid as a whole.
Background Colour	This sets the background colour for the grid.
Band Colours	This is the colour that will display for alternate rows when the Show Bands feature is turned on.
Selected Cell Colour	This sets the background colour for the cell (or rows in multi-select mode) that is currently selected.
Toolbars	These settings allow you to specify whether each toolbar is visible or not.
Columns	Here you will find a list of all columns capable of being shown in the current grid. Those that are visible have a tick in the box next to them. By clicking the check box you can make columns visible or invisible as you'd like. You can also access the Column settings window for the currently selected column via the button at the bottom right corner of the window.
Filters	Here you can set up more complicated filters as described in Filtering data.

Column Settings

If you right-click on a column and select "Column Settings" you will be presented with the column settings window. This window allows you to set various properties for each column individually.

Width	The width of the column. You can set this numerically here as an alternative to dragging the column heading.
Hidden	By ticking this box you can hide any columns that you never use in order to make more space for other columns. The data represented in these columns can still be viewed and edited in the edit window for the

	item. Sometimes a column may be hidden due it not being applicable as a result of a setting elsewhere. Where this is the case the reason it is hidden is displayed here.
Spell Check	If this box is ticked the cell in this column will display mis-spelled words with squiggly red lines. See Checking spelling for more information.
Text Alignment	This group of buttons allows you to set the alignment of text to either Left, Right or Centre.
Cursor Position	This setting determines the position of the cursor when you tab into the column. You can have the cursor appear at the beginning,at the end or for all the text to be selected. The latter is useful if you want to be able to replace the entire text quickly.
Use Column Style	When ticked the column will use the colour and font specified in the following settings, rather than using the font and background colour specified in the grid settings window. This is useful if you want a column to stand out for some reason.
Background Colour	The background colour for the column. See Specifying Colours for more details.
Font	An example of the current column font is displayed. The "change" button allows you to change all aspects of the font.

Toolbars

Most of the functions applicable to grids can be accessed from the buttons on the toolbars at the top of the grid. Each grid has three separate toolbars:

Main toolbar

This contains buttons for adding, deleting, moving and editing the selected items in the grid.

States toolbar

This contains buttons that control the appearance of the grid. These include Multi-select, Show bands, & Expand and contract.

Properties toolbar

This contains buttons for setting properties for the items in the grid such as estimated for attendances or expert fees for disbursements.

These toolbars can be dragged to different positions should you so wish, or you can also hide any toolbars that you don't use, perhaps because you always use the keyboard shortcuts. You can do this via the right-click pop-up menu that appears when you click on the toolbar, or from the toolbars sub menu on the main grid pop-up menu. Power users can even hide all toolbars to release space for more items on screen.

Exporting grid data

Data in any grid can be exported for use in a spreadsheet or other program.

The grid contents can be exported in CSV or XML formats. There is an option in the local settings window to specify whether a header row is added when exporting to a CSV file.

Only data in visible columns is exported. Any notes recorded for an item will also be included if the properties column is visible.

Other features

These features are all found on the pop up menu that appears when you right-click on the grid.

Show All Columns

This will make any hidden columns visible.

Reset Grid Settings

This will cause the grid to revert to the state it was in when it first appeared. Only the default columns will be visible and the settings will all be reset to their defaults.

Refresh Grid

This setting will cause the grid to repaint itself. Occasionally you might encounter a situation where the grid does not paint itself properly particularly when it is first shown. Clicking Refresh Grid will often cure this but we would ask that you also let us know about the problem so that we can fix it.

Open Parent Window

(found under Current Item). This will open the window of the item one level up from the currently selected item.

Open Current Window

(found under Current Item in the Part Attendances and Part Disbursements window). This will open the currently selected item in its original window.

Set Index For Items of the same date

When selected will set the index field for all items of the same date in ascending order. The index field is used as a secondary sort field on export (typically for bills such as CLAIM1s where items from many locations are put into a single table). This function really comes into its own in the part attendances window where you can sort items by date, then manually re-order the items of the same date into the order you want them to appear before using this function to set the appropriate index values.

Working With Files

Introduction

The work you record in CostsMaster Draftsman is saved to and loaded from files which are stored on your hard disk. From version 5 CostsMaster Draftsman files are saved with the .cmxd file extension, although this may be hidden by Windows. Files in earlier versions of CostsMaster had either a .cm3 (CostsMaster 3 & 4) or .cdc (Costsmaster 1 & 2) extension.

A CostsMaster file represents both the computer disk file as well as the solicitor's paper file and/or electronic time record that you cost.

Opening Files

New File Ctrl + N

Open File Ctrl + O

Reopen File

Starting a new file.

Clicking the New file button will take you to the welcome screen that you see when you first start CostsMaster. From here you can start a new file based on a template or a completely new file.

Starting a new file gives you a completely blank file. If you find you are re-entering the same data each time you can save this data as a program template and use that as the starting point for future files.

There are two main ways of opening CostsMaster files, from within the program or from a Windows folder window.

Opening files from within CostsMaster.

If you already have CostsMaster running you can open files by clicking on the Open File button on the toolbar, or by going to the File menu and selecting "Open". This will open the standard file dialog which will allow you to browse the folders on your hard drive and locate your files.

When first opened, the dialog displays your CostsMaster files folder which by default is a "CostsMaster Files" subdirectory within your "My Documents" directory, but you can navigate to any other location on your PC or network.

By default the dialog shows all files with a file extension that it can open (.cmxd) but you can change the type of file displayed by changing the value of the "Files of Type" box at the bottom of the dialog. Files saved by Quota can be opened in Draftsman. This allows the costs team to open files started by a fee earner using Quota and develop them into a full bill. However, Draftsman files cannot be opened in Quota so if someone in the costs team is starting a budget that is going to go to a fee earner to work on they must start it in Quota (which is included free with Draftsman).

A number of sample files are installed with the program. You can use these to explore the features available in CostsMaster and see the different types of document that you can produce.

Opening Files from a Windows Folder

If you do not have CostsMaster running you can open a file from within a Windows folder such as your My Documents folder, by double clicking it. This will start CostsMaster and open the file automatically for you. Only files saved by CostsMaster 3 and later can be opened in this manner - clicking on a .cdc file will open the file in CostsMaster 2.

Reopening Files

Files you have worked on recently are listed within the Reopen menu. Simply clicking on one will reopen it without you having to browse your hard drive for it. Any files that can't be found on your system are greyed out.

Opening Files from a Newer Version of CostsMaster

If you try to open a file that has been saved by a more recent version of CostsMaster you will be presented with a warning box advising you that the file can be opened but that any information specific to the newer version will be lost. This should not be a problem if you are only going to work on the file yourself but, if you intend to send the file back to the person who originally saved it, that information will not be retained and they may have to enter it again.

Generally you are advised to always use the latest version which can be freely downloaded from our web site at any time.

Opening Backup Files

When you save a file CostsMaster makes backups of the previous saves up to a number that you can define in the Local Settings Window. To open one of these backup files go to the File menu and click on Open. In the file dialog box change files of Type to "CostsMaster Backup Files". Backup files are stored in their own folder which, by default, is a backups sub folder within the CostsMaster Files folder, so you will need to navigate to there.

Your backup files should have the extensions .c01, .c02 etc up to the number of backups you have specified. the .c01 file is the most recent.

Please note that using the above method to open backup files will show only files up to .c09 in the dialog. To view older files you will need to change the "files of type" box to "All files".

Saving Files

Save Ctrl + S

Save As Ctrl + F

If you have recorded work or made any changes to a file within CostsMaster you should save your work to disk by clicking the Save button on the main toolbar, or by going to the file menu and clicking "Save" or "Save as...".

If you click "Save" and the file has previously been saved or opened (i.e. there is a known file name) the file will be saved without further intervention. However if the file has not previously been saved or if you click "Save as..." then the standard CostsMaster file dialog will appear allowing you to browse for a folder in which to save the file and give it a name.

When first opened the dialog displays your CostsMaster files folder which by default is a "CostsMaster Files" subdirectory within your "My Documents" directory, but you can navigate to any other location on your PC or network.

If you attempt to close the program when there is unsaved work you will be prompted to save the file.

CostsMaster also has a comprehensive system for making backups of bills and for automatically saving your work at pre-defined intervals. These options can be accessed from the Local Settings Window.

Program Templates

New From Template Ctrl + T

Save As Template Ctrl + W

Program templates is the name we give to partially completed CostsMaster files that are used as the basis for the subsequent bills you produce.

When you start a new file you will probably find that there is some information you enter time after time. To save yourself entering it every time you start a new file, enter the information then click Save As Template.

When you next need to prepare a bill or budget, instead of starting a new blank file go to New From Template and select the template you previously saved. This will start a new file with all the information previously entered saving you from entering it all over again.

A number of basic program templates are provided as a starting point. If you alter these you should save them with a different name otherwise your changes may be overwritten when updating the program.

If you work in house or do a lot of work for the same solicitors you might find it worthwhile to record details of fee earners within the template.

Program Templates from earlier versions of CostsMaster

If you have created Program Templates in earlier versions these can also be opened but will undergo the conversion process as for ordinary files from older versions. We would recommend that you re-save the files as templates in the current version to avoid having to undergo the conversion process each time.

File Locations

By default CostsMaster is installed to C:\Program Files (x86)\CostsMaster Draftsman, though you can of course change this during the setup.

The default save directory is set to <My Documents>\CostsMaster files

Settings are stored in <Application data>\CostsMaster\Draftsman. The settings are stored in xml files. Whilst these files can be edited in a text or xml editor we do not recommend this as XML files are not as tolerant of badly formed data as ini files. Thus a mistake in editing could cause the settings to be lost.

Dictionaries are stored in <Application data>\CostsMaster\Dictionaries.

Export templates are recorded within the Windows Registry but settings are maintained in an "Export Template Settings subfolder of the Settings directory.

The default location for program templates is<My Documents>\CostsMaster files\Program Templates

Some of these default locations can be changed from within CostsMaster by going to Options > Local Settings > File Locations.

Chapter 4

Setting up the bill

Setting Up The Bill

VAT

Ctrl + Shift + V

VAT can be defined in a number of places within CostsMaster. It is usually accessed from a button that will show the VAT window but some grids also offer a "Claim VAT" property that allows you to turn the claim for VAT on and off.

The VAT window allows you to specify whether VAT can be claimed and at what rate. There are three common scenarios:

1. Claim VAT on both profit costs and disbursements:
   Tick the Claim VAT box and enter the appropriate rate in the VAT Rate box.

2. Do not claim VAT on profit costs or disbursements:
   Untick the Claim VAT box.

3. Claim VAT on disbursements but not on profit costs:
   Tick the Claim VAT box but enter 0 for the VAT Rate. The VAT on profit costs will come out at zero and will be ignored whilst VAT on disbursements can still be claimed.

Instructing Solicitor

Ctrl + I

This window can be located under the File menu on the main toolbar and contains information relating exclusively to the instructing solicitor.

This window contains information about the firm of solicitors with conduct of the matter. It contains contact details that are used on forms and on the front sheets of bills.

Bills

Ctrl + Alt + B

The bills window is where you specify settings that affect the entire bill that you are costing.

There is no need to specify the type of document you are aiming to create. Instead you simply select the bill you would like when exporting. It is even possible to export multiple bills of different types should you so wish.

Show or Hide Features

This control mimics the similar button on the Control Centre. It lets you hide features which are not relevant to the type of bill you are doing.

Default Phase

The Default Phase is used to specify the phase that is used for new attendances and disbursements. You can select the phase from the drop down box but please note that this control will have no impact if the attendance is within a part that has its own default phase set or for a party that has a default phase set. In these circumstances the party takes first precedence followed by the part.

This control mirrors that in the Control Centre.

VAT

VAT for the bill as a whole.

Enhancement

Here you would define enhancement that will apply to all costs within the bill. It is analogous to global enhancement in CostsMaster 2 except that you are not limited to claiming it at different rates solely on preparation and procedural steps. Please see the section on Enhancement for further details.

Case Details

Shows the Case Details window where work about the Court and the parties to the action can be entered.

Case Details

Ctrl + Alt + D

The Case Details window contains details of the Court that the matter concluded in, the case type, the assessment basis and the parties to the action. This information is used on forms and on the headings of bills of costs. It is not necessary to complete all the information here if it is not going to be used for the particular bill you intend to prepare.

This window contains information applicable to most bill types but information specific to a particular bill type can be accessed by clicking on the appropriate button at the bottom of the window.

Court & Title

The Court, Division and Sub-Division boxes have a number of preset Courts from which to choose.

If you choose "Family Court", then the choices available when you set your CLAIM1A up which relate to which Court the proceedings finish in will change: they will instead relate to the Judge presiding over the proceedings at the conclusion. Similarly if you are recording FAS details the "Court level" selection will change to refer to the Judge rather than the Court itself. Choosing any other Court will cause these changes to revert.

If you are preparing a CCFS Case Plan in the Family Court, you will need to choose "High Court", "County Court" or "Family Proceedings Court" from the Division box in order to set the "Level of Court" ("Section A. Brief Summary of Case").

Case Type

This field lets you specify the type of case as used on a CLAIM1/A or Case Plan. It is only visible when showing All or Legal Aid features.

SCCO Ref

This box is used in Court of Protection cases to include the SCCO Ref which must be included on the COP-E bill.

Parties to the Action

Parties to the action are entered in a grid. These have a dual purpose: as well as appearing in the heading of the action it is also possible to specify that they are a client, in which case further information can be recorded including full details of their legal aid certificate.

Description

The name of the party as it appears in the action. Using the Shift + Enter shortcut in this column will cause CostsMaster to attempt to identify the client title, first name and last name from the description.

Status

Their status in the action (e.g. Claimant, First Respondent etc.)

Type (Paying or Receiving Party)

Whether the party (or its solicitor in legally aided cases) is to pay costs, receive costs or neither. When specifying that a party to the action is a client, this will be automatically set to "receiving", provided it has not previously been set to "paying". For budgets and N260s, which are prepared before the award of costs, you should set the party you are acting to as "receiving" as the document you are preparing is for the costs that will be claimed if they obtain an award of costs.

For Court of Protection cases, there is a further option for identifying the name of the protected party. This needs to be set in order for the COP-E to show the protected party's name in the title of the document.

Title

The title of the client.

First Name

The First names of the client.

Last Name

The Last name of the client

Surname at Birth

The client's surname at birth if different

Date of Birth

The client's date of birth.

 **Client**

This property indicates that the party to the action is also a client. It indicates to the program that details specific to a client such as title, first and last names and date of birth can be used where appropriate. If any of the client specific fields are completed this property will be set automatically.

Notice of Commencement

Here you can enter information concerning fees and costs relevant to the form for Notice of Commencement of Assessment Proceedings. The fees and costs can be recorded as presets and applied by clicking an entry from the pop up menu that appears when you click the "Presets" button.

Assessment Section

Assessment Instruments

This button gives access to the assessment instruments window where you can define all the documents giving authority for assessment.

Assessment Basis

This lets you specify whether the bill is prepared on the standard or indemnity basis.

Court of Protection Section

COP Bill Type

This box lets you select from four types of bill that you are likely to prepare. This is then used in the bill description within the COP-E. In addition, for some of the selections, additional controls become available.

OPG Estimate

This box is only enabled if you have selected General Management as the Bill type. It allows you to record the OPG Estimate which is then shown in the COP-E .

Start/End Date

Visible only when General Management is selected, these boxes allow you to define the start and end dates of the period covered by the bill.

Property Address

This box is enabled if you have selected Property Sale and allows you to record the address of the property, which is then used in the COP-E

Assessment Instruments

This window allows you to define orders and judgments that give authority for assessment together with their date. When exporting the front sheet of a bill this information will automatically be included in the description that appears on the front sheet.

As well as entering the information manually you can create assessment instrument entries when entering procedural steps. When you have created a procedural step for your judgment, order or discharge of legal aid certificate and recorded the date there is a quick function that will create the assessment instrument for you. It will also look at the text of the procedural step and attempt to work out if the step relates to a judgment or order, with the latter being assumed when it cannot tell. There are two ways to create an assessment instrument from a procedural step:

- In the procedural step grid, select the step, right click on the grid and select "Add as Assessment Instrument".
- In the Edit Procedural Step window click the "Add as Assessment Instrument" button.

Legal Aid Funding Certificate

Right Shift + Right Ctrl + F

This window can be accessed from the Case Details window.

This window allows you to enter full legal aid certificate details for a client if you wish. The certificate details are typically used on the heading of a case plan or the front sheet of a bill of costs. As this information also typically appears as procedural steps in exported bills, there is a button that when clicked will create procedural steps for all items defined in this window.

For each certificate it is possible to enter the number and any apportionment, plus a number of items relating to scope and limitation at different points in the life of the certificate. This information is entered in a grid and the following fields are available:

Type

This is the type of action that occurred to the certificate at this stage. Possible options are:

Full
Emergency
Amended
Discharged
Revoked
Prior Authority
Change Of Solicitor

Date

This is the date of the action

Scope

The scope of the certificate at this time. For Prior Authority this will be what the prior authority was granted for e.g. "Psychiatrist".

Limitation

Any limitation on the certificate at this time. For Prior Authority this is the amount for which authority has been obtained e.g. "£5,000.00". Include any currency symbols or other formatting you want to appear.

It is not necessary to enter full details of the certificates here if you do not wish to do so. For a case plan it is sufficient to make one entry.

The information on this window is used to create the legal aid certificate information on the front sheet of bills. If you do not want any information here to be shown on the front sheet you can exclude it.

Excluded

Any items that are excluded will not appear on the front sheet to an exported bill.

Draw Attention

This property can be used to highlight items that require your attention in some manner.

Full Details

When this property is selected the item will appear on the front sheet with full details of the scope and limitation, whereas normally this information is not exported.

Create Procedural Steps

When preparing a bill for assessment by the Court it is common practice to include the changes to the certificate as procedural steps. This button will save you having to enter the information twice by automatically creating the procedural steps for you. Any items which have been marked as excluded will not have a step created for them. The program will attempt to create the procedural steps at the correct place but please note that it does not check to see if it has already created procedural steps, so pressing this button twice will result in duplicates being made (unless you temporarily mark as excluded the items already created).

CCMS Reference Number

When preparing a claim to submit to CCMS it is necessary to include the Reference Number which is issued by the LAA.

Narrative

Ctrl + Alt + N

The narrative window is where you record narrative information for inclusion in the bill. In CostsMaster 2 it was confined to the main narrative for your bill but in this version it contains tabs containing the enhancement justification, reasons for instructing Counsel in the Family Proceedings Court and Value of Assets, for Court of Protection E-Bills.

These tabs can be hidden if you don't need them for the current bill by right clicking in the window and de-selecting the entries you want to hide. The settings for which tabs are shown and which is the current tab are stored so that the next time you reopen the file the same tabs are shown.

Narratives can also be defined separately for each part. For further details please see the section on parts and for details of how and when these part narratives can be exported please see the section on assigning parts in the export wizard.

Costs Budget

 Ctrl + Alt + Y

The costs budget window allows you to specify information needed for the budget as well as manage each phase. Please see the sections on preparing costs budgets and managing costs budgets for further details.

Date of Costs Budget

The date of the costs budget for inclusion on the exported document.

Date of CMC

The date of the CMC hearing, for use in the Precedent R

Include Costs of Assessment

Whether costs of assessment are included in the budget. If ticked then any work recorded in the costs of assessment window (other than the costs draftsman's fees at a percentage) will be included in the budget. If unticked then the figures will not be included and the words "costs of assessment" are added to the list of items not included on the front of the exported document.

Other Exclusions

Here you can list any other items that have not been included in the costs budget. The text here will be included on the front page of the exported document.

Budget Figures Include

This setting determines whether the figure entered for the budget in each phase is in respect of anticipated costs only or both incurred and anticipated. This will ensure that the correct calculations are performed when advising you on whether you are over-budget.

Client Budget

As well as managing the budget set by the Court, you can use this window to keep a track on any budget set for the client.

Include Budget Percentage Costs

When ticked the exported document contains provision for the costs of the budget and of the budget procedure. These figures can be calculated automatically or you can specify the figures directly. If calculated automatically you can also specify whether they should be calculated solely on future costs.

Date of Service of Precedent T

The date of service of the Precedent T. This field is only visible when the Anticipated property has been set on at least one part.

Explanation for Variation

The general reason for seeking a variation of the Costs Budget. This field is only visible when the Anticipated property has been set on at least one part.

Phases

The grid on this window has a row for each possible phase, plus an additional row for "Unassigned or Solicitor/Client costs". Additional rows can be added, should you need to define a conditional phase. Additional phases defined here will then be available as an option in the phases drop down control for applying to work, as well as the default phase controls. It is not possible to delete the standard phases but they can be re-ordered (for convenience - they will always export in the standard order) but conditional phases you have created can be deleted.

Although the costs budget phases differ from the phases for a bill, this is not a problem because the phase is determined automatically from the task that has been recorded. As long as you record tasks for the items you want included the correct budget phase will be used for the costs budget even though it may differ from the phase used for the bill.

The following fields are available for each phase:

Phase Name

The name of the phase. This is editable only for conditional phases you have created.

Assumptions

Any assumptions made when anticipating costs for this phase.

Budget

If a budget is set for a phase you can enter it here. This will then allow you to manage the budget using this window.

Incurred / Pre-Budget

The total costs assigned to each phase in parts marked as Incurred or Pre-Budget. This field is read-only (calculated from the work entered on the file).

Anticipated / Budgeted

The total costs assigned to each phase in parts marked anticipated or budgeted. This field is read-only (calculated from the work entered on the file).

Before a budget is set the above two fields are called "incurred" and "anticipated". This reflects the perception of the work at the stage of preparing a costs budget. Once the budget has been set or agreed, these columns change to "Pre-budget" and "Budgeted" which reflects the perception of the work from the budget up to the stage of preparing a bill.

Variation

The total costs assigned to each phase in parts marked as Variation. This represents additional costs sought on an application to vary an existing costs budget. This field is read-only (calculated from the work entered on the file) and is visible only once the variation property has been set in at least one part.

Variation Explanation

The reason for seeking a variation of the costs budget in respect of each phase. This field is visible only once the variation property has been set in at least one part.

Total

The total incurred and anticipated costs for each stage. This field is read-only.

Discussion

This column allows you to add comments to an opponent budget (see below) or to add the other side's comments if you are trying to produce a single document budget. This field is only visible once an opponent budget has been created.

Opponent Budgets

It is possible to record details of the budget(s) prepared by your opponents in order to produce the costs budget comparison document. To do so click the "+" symbol in the bottom right hand corner and you will be prompted to enter the name of the opponent. If you have managed to obtain their budget in excel format CostsMaster can attempt to extract the figures automatically. If you only have a paper document, or if the Excel document is not in the expected format, you will need to enter the figures manually. You will see that as well as a tab for your own "Costs Budget Phases" a new tab will have been created for the opponent you have added. You can now enter the budget details in the same way as you did for your own client.

The following controls are made visible when viewing an opponent budget:

Opponent Budget Name

The name of the Opponent

Initials

These will be created automatically by CostsMaster but can be altered. They are used in various exported documents to identify the costs claimed in each opponent budget.

Show Preliminary Points

When this tick box is selected, it is possible to record general points in relation to the opponent budget as a whole. These will appear in the Precedent R as a separate row above the phases.

Fixed Recoverable Costs

This page allows you to specify information that will appear at the top of the Precedent U, as well as calculate the fixed recoverable costs themselves. The top half of the page has controls that are common to all types of case (though some controls may be disabled if not relevant), whereas the controls on the lower half change to reflect the type of case specified above.

Protocol & Track

These controls both define that table that is used for the fixed costs calculation, and to specify the track of the case on the Precedent U. When you select "None" for the Protocol, the relevant table will either be Fast Track or Intermediate Track, as determined by the Track control. For other values, the Protocol setting will determine the table directly. If you select the combination None/Claims Portal then no fixed costs will be claimed.

Hearing Type

This is either Trial or Costs Determination and is used in the heading of the Precedent U.

Claiming Additional Costs

This box is used to specify whether you are claiming costs under rules 45.9, 45.10, 45.50(3) and/or 45.13. In this case, that part of the claim needs to be made by separate N260 as per the note on the Precedent U.

Hearing Date

As shown on the Precedent U.

Complexity Band (FT/IT)

For tables where the costs are divided by complexity band.

No of Defendants (FT/NIHL)

For tables where the costs vary depending on the number of defendants.

Monetary/Non-Monetary Value

These are shown on the Precedent U but also affect the calculation in those tables that include a percentage of damages in the recoverable costs.

Additional Claimants (FT/IT)

Will include an additional 25% for cases where an appropriate order has been made. The box below allows you to include an explanation for this item in Section B of the Precedent U.

London Weighting

Will include an additional 12.5% for firms within the London area. The box below allows you to include an explanation for this item in Section B of the Precedent U.

Stage / Fixed Costs Calculation

The main fixed costs calculation is made by selecting the stage that the case reached. The values for this vary depending on the table selected. The amount that is calculated will appear in the box to the right of the stage box with a red outline. To the right of that is a box which allows you to include an explanation for this item in Section B of the Precedent U.

The following controls to the right of the stage box affect the calculation of one of the above elements:

Credit for costs of preliminary issue (FT/IT)

Where costs are being claimed for a substantive hearing after costs have been awarded on a preliminary issue, this box allows you to give credit for the appropriate amount of the preliminary costs as provided by the rules.

Costs of litigation after preliminary issue (NIHL)

Where costs are being claimed for a substantive hearing after costs have been awarded on a preliminary issue, ticking this box causes the stage calculation to be calculated from a later date as provided for in the rules.

Settled 2/2-5 days before trial (FT/IT)

Where a case settles before trial, ticking this box allows advocacy costs to be claimed at a lesser rate.

Extra full/half trial days (IT)

Allows extra advocacy costs to be claimed for additional days.

Defence to counterclaim (IT)

Allows an additional sum to be claimed for Statement of Case (for some complexity bands) where a Defence to Counterclaim has been drafted.

Prepared trial bundle (IT)

Allows an extra sum to be claimed for the stage payment (for some complexity bands) where the solicitor prepared the trial bundle.

Liability Admitted/Papers Prepared (NIHL)

Allows different levels of the stage payment to be claimed depending on these factors.

Other Fixed Recoverable Costs

Below the Stage control are other controls representing additional costs which may be claimable. These vary depending on the type of case and the stage reached e.g. Advocacy. Simply tick the check box for any that apply and a red outlined box will appear with the amount included. Some check boxes may not be enabled, depending on the stage that has been selected. The box below each check box allows you to include an explanation for the item in Section B of the Precedent U.

Disclaimer

The amounts are provided by us in good faith from close scrutiny of the rules and practice directions, but we provide the ability for you to alter these amounts if you feel they are incorrect. The figures in any box with a red outline can be therefore altered by you if you wish but any changes to a control on this page that affects that value will cause it to be recalculated and your value overwritten. If you do think that we have interpreted the rules incorrectly, or have a value recorded incorrectly, please let us know so that we can correct it for a future version.

The text of the controls on this page are in many cases abbreviated and do not purport to represent the full range of circumstances where an item may or may not be claimed. This page is provided as a means by which a trained Costs Lawyer can apply their knowledge of the rules to quickly create a Precedent U and is not intended as a means by which an untrained person can acquire such knowledge.

Parties

 Ctrl + Alt + P

Parties are the various persons the solicitor corresponded with during the course of the case (and should not be confused with parties to the action).

The parties window gives access to the following fields:

Description

The name of the party as it will appear in the bill. The Description must be unique - if you add a description that already exists (or if you paste an item copied from the grid) CostsMaster will automatically add a number to the end of the description or, if there is already a number at the end it will increase the number by one.

Aliases

When importing work from a time recording system it is possible to automatically assign work to parties based on the name recorded within the recorded descriptions. However these often vary (e.g. What you have recorded as client might be referred to as "client", "CLT", Claimant" or the client's actual name.) You can use this field to record these additional descriptions, each separated by a comma or other punctuation, in order to assist the automatic assignment process. This field has no use beyond the import work process. This field is only accessible from the Edit Parties window.

Additional Description

A field to record additional information that you might want to appear after the party name in an exported bill

Heading for Misc Attendances

An optional heading that can be used before the miscellaneous attendances

Shortcut

It is possible to assign a keyboard shortcut to each party so that you can quickly open the party details window to record routine work. This makes costing a file considerably faster than having to access the party via the mouse. Available shortcuts are from F1 - F12 with all combination of Shift, Ctrl & Alt keys. In addition the right Shift & Ctrl keys are treated separately giving 132 possible shortcuts.

Even if you run out of shortcuts it is possible to reuse shortcuts from little used parties by ensuring that the ones you want are further up the list of parties.

When you create a new party the next available shortcut is suggested to you but you can assign any shortcut of your choosing. Shortcuts are assigned by holding down the key combination you want while the cursor is in the shortcut box.

Legal Aid Activity

The legal aid activity used for CCMS. If you are preparing a CLAIM1 or

CLAIM1A form you can specify the activity and it will automatically be converted to the appropriate code. In fact you can type the old format code into the box and the appropriate activity will be selected.

New attendances created for this party will automatically have this activity assigned to them though you can override this on an attendance by attendance basis should you so wish. When the legal aid activity is changed any attendances for this party that had the former activity will be automatically altered to have the new activity, but attendances that had a different code will remain as they are.

Phase, Task & Activity

Setting the phase for a party is not necessary but can be done if you have set up the "parties" as holders for work from each phase. It can also limit the choice of tasks available in the Party Details window, but you may find it easier in this instance to leave the party phase as unassigned and set the default phase in the Control Centre.

Setting the activity for a party is essential if you wish to record standard communications for the party. Even if you do not wish to do that, it is still desirable to set the activity if you are using parties in the traditional sense as activities are likely to be the same for all attendances for a party and setting the value here will save you having to do so for each attendance.

If you alter the phase or activity after recording attendances or disbursements for this party, the phase and activity of those attendances and disbursements may be changed automatically, or you may be asked whether you wish to alter these values, depending on the setting for this in Local Settings > Phase/Task/Activity Options.

Export Position

In bills this determines where in the bill the party work will appear. Options are:

a) Before procedural steps
b) After procedural steps
c) In party section (the default)
d) After documents
e) After travelling & waiting
f) After work done
g) After miscellaneous disbursements
h) After success fees
i) After costs of assessment

It is therefore possible to use a "party" for some other purpose such as miscellaneous notices.

N260 Party

This field allows you to specify the default N260 Party for work recorded against this party. Please note this affects only new work and will not alter any work already recorded.

Excluded

Any work recorded against a party that is excluded will not appear in the exported bill.

Draw Attention

This property can be used to highlight items that require your attention in some manner.

Enhancement

The enhancement claimed on all work recorded against this party.

Additional Liabilities

Ctrl + Alt + S

This window allows you define one or more success fees together with associated disbursements. You simply need to specify the details of the success fee and it will automatically be claimed in your bill, calculated on the total profit costs of the parts which are assigned to the fee.

Obviously, success fees are claimed on inter partes costs only. Legally aided costs will not be affected by any success fees claimed. The Bill Settings and Breakdown Settings windows contain options that determine whether the success fee is claimed on Summarily assessed costs and on costs of assessment.

Success fees are defined in this window but you must later specify which parts utilise which fees. This is done in the Parts window. If you create a part after creating a success fee the part will automatically be assigned to the last success fee defined.

Any success fees not assigned to a part will appear in blue text.

Success fees for Counsel are defined in the Counsel window.

Description

Text that will allow you to identify the success fee. This must be unique and if you therefore enter text that already exists, CostsMaster will attempt to make it unique by adding numbers to the end. Newly created success fees are given the default text "*Success Fee*".

Success Fee Percentage

The percentage at which the success fee is calculated.

Location

You can specify exactly where in a bill the success fee will be claimed. In a column bill this option applies to the solicitor's success fee and any associated disbursements but in an electronic bill it applies only to the disbursements as the success fees are calculated on a line by line basis.

Because parts can be combined and reordered when exporting you are given three options concerning the placement of the fee.

- **End of Last Relevant Part** - the success fee will be claimed in the last exported part that utilises the fee. It will be calculated on the profit costs of all parts that utilise the fee. This is the default.
- **End of Each Relevant Part** - the success fee will be claimed at the end of each part that utilises the fee. It will be calculated only on the profit costs of that part.
- **End of Bill** - the success fee will be claimed in the last part of the exported bill even if that part is not assigned to this or any other success fee. It will be calculated on all profit costs that utilise this success fee throughout the bill.

Limit to Percentage of Damages

It is also possible to limit the success fee to a percentage of damages. When enabled you can specify both the damages and the percentage to which the success fee is limited and the fee claimed will not exceed this.

Disbursements

This field can be used to record any associated disbursements such as an after the event insurance premium.

VAT

This field allows you to specify the VAT rate used for the success fee. By default it uses the VAT rate of the part in which the success fee is exported, but it is possible to specify a different rate if you want the success fee to appear in a particular part but not use the VAT rate for that part.

Excluded

Success fees themselves cannot currently be excluded, though if they are assigned to one or more parts that are all excluded, a grey cross will appear in the properties column to indicate that they are excluded by virtue of a setting elsewhere. Any disbursements recorded within such a success fee will also have this icon in these circumstances though it may also have this icon if the Success Fee is not assigned to any part.

Draw Attention

This property can be used to highlight items that require your attention in some manner.

Parts

Ctrl + Alt + T

A CostsMaster Draftsman bill consists of one or more parts. You therefore need at least one part but you may have more.

For bills to be assessed by the Court the distinction between parts is clearly shown. However, many forms make no provision for parts but CostsMaster still allows you to record work in different parts and where possible shows work separately. Even if you do not intend to split the work into parts in the finished bill you can still break the work into different parts in CostsMaster and combine them automatically when exporting.

You may also split work into parts for your own benefit and combine them dynamically when exporting the bill.

You will see that the main toolbar displays, in the bottom right panel, an indication of the currently selected part (or the fact that no parts have yet been defined if that is the case). When you look at work windows (which we will come to later) the details shown will be those for the currently selected part.

A part has the following fields:

Description

The name of the part as it will appear in the bill. This information may only appear in a bill if it has more than one part.

Additional Description

Further information that you may wish to include after the part heading in a bill. This text will always appear with the part heading.

Start Date / End Date

You can optionally specify the dates that this part covers. These dates can be used to automatically show the period a part covers in an exported document. In addition when you record an attendance outside the range of dates the program warns you that you are doing so, in case you are inadvertently entering an attendance in the wrong part.

VAT

The VAT that is claimed for this part.

Export Options

Accessed from the Edit Parts window, this window lets you specify how this part will be exported (if at all) to various bill types.

The settings here reflect those set in the export wizard. Please see the section on Assigning Parts and subsequent sections for further information.

Incurred / Pre-Budget

Anticipated / Budgeted

Variation

Non-Budgeted

These mutually exclusive properties replace the old "Anticipated" property and are used to specify whether the costs in a part are incurred or anticipated, or how they relate to an existing Costs Budget.

By default costs in a part are deemed to be "Incurred" but setting the Anticipated property will mark them as future costs for a Costs Budget or Legal Aid Case Plan.

Once a budget has been recorded for any phase in the Costs Budget Window these properties appear as Pre-Budget and Budgeted respectively. They will export as such to a bill that breaks work down by phases.

The Variation property identifies the part as containing the extra costs to be sought on an application for variation of an existing Costs Budget.

The Non-Budgeted property is used to indicate costs that fall outside the costs budget.

Please see the sections on preparing costs budgets and recording work in an Events Based Case Plan for further information.

Excluded

If a part is excluded any work recorded within it will not appear in an exported bill.

Draw Attention

This property can be used to highlight items that require your attention in some manner.

Aspect

For work falling under the various Legal Aid fee schemes this setting determines which aspect of work is recorded within this part. It is possible to record work from multiple aspects within a single bill - each part can only contain a single aspect but it is possible for more than one part to be assigned to a single aspect.

When exporting a CLAIM1A the program will automatically collate work from the same aspect into separate CLAIM1A forms based on this setting. This setting is also used to determine if FAS applies to this part.

When preparing a CCMS claim CostsMaster will similarly collate work together by aspect.

LA Court Type

For CCMS claims it is necessary to specify the type of Court in which the work claimed in the part was carried out.

The value is used by CCMS when pricing the claim so it is important that the correct value is specified. If work was carried out in more than one Court and will therefore need to be claimed at different rates, you will need to record the work in separate parts with different values for this field.

Enhancement

Any enhancement claimed for this part.

Events Case Plans

This button gives access to a window where you can record the previous solicitors costs for use in an events based case plan only.

IP Limitation / Legal Aid Limitation

It is possible to limit the profit costs of a part. Please see the section on Limiting Costs for further information

Additional Liabilities

To specify that the costs in this part are subject to a success fee you can choose the success fee that applies (from those already defined in the Additional Liabilities window)

Summary Assessment Date

The date of any summary assessment hearing covering the costs in this part.

Summary Assessment Judge

The name of the Master of Judge who is assigned to deal with the Summary Assessment Hearing.

Summary Assessment Hearing Type

The type of any summary assessment hearing covering the costs in this part. You can select from the pre-selected text or add an entry of your own.

Default Phase

The Default Phase is used to specify the phase that is used for new attendances and disbursements within this part. You can select the phase from the drop down box but please note that this control will have no impact if the attendance is for a party that has a default phase set. In these circumstances the party takes precedence. This setting will, however, take precedence over any default phase set for the bill.

Narrative & Enhancement Justification

Each part now has its own Narrative and Enhancement Justification fields. You can use these to record information that relates only to a specific part, or to be used when exporting the bill in a different format. Please see the section on assigning parts in the export wizard for further details.

Changing Parts

When you look at a work window, such as the Documents window, it will show all the documents recorded within the current part. The current part is displayed at the bottom of the main toolbar. Selecting a part in the parts window changes the current part to the newly selected part. However you can also change parts quickly by using the shortcut Ctrl +↑↓whether the parts window is open or not.

Limiting the costs claimed

Sometimes you might want to claim a profit costs figure for a part that differs from the total of the work recorded. One example is where the solicitor has delivered interim statute bills to the client and you cannot claim more than the total claimed in those bills, another is where a costs order provides for only a percentage of costs to be recovered and a third might be where you want your case plan to show the exact same figure for pre contract work as appears on the CLAIM1 which, due to the effects of rounding, rarely happens.

In CostsMaster the total costs claimed in each part can be restricted to a minimum, a maximum, a percentage or a fixed figure.

In the Parts window there are columns called "IP Limitation" and "Legal Aid Limitation". For each part, this column will display the amount of any limitation in the part for inter partes or legal aid costs respectively together with an indication of whether the limitation is a minimum, percentage or fixed if appropriate (if a maximum limitation is selected just the amount is shown).

When you click in the cell a small button appears on the right. If you click this you will open the Edit Limitation Window.

Amount

This is the amount you want to claim for the part or the percentage alteration if appropriate.

Description

This is the text that will appear in the bill when the costs are limited.

Type

This determines the type of limitation. Four options are available:

- Maximum - If the costs exceed this figure the specified amount will be claimed, otherwise the actual costs will be claimed
- Minimum - If the costs are less than this figure the specified amount will be claimed, otherwise the actual costs will be claimed.
- Percentage - The costs claimed will be the specified percentage of the actual costs incurred.
- Fixed - The specified amount will be claimed irrespective of the amount of the actual costs.

It is also possible to specify the type of limitation without going into the edit limitation window. In the parts grid you simply have to enter the amount in the column together with the letters "max", "min", "fix" or the "%" symbol and the program will make the appropriate selection. Please note that setting the amount without any letters will alter the amount only.

Applies To

You can use this box to specify the type of bills the limitation will apply to. By default all bills are limited.

Limiting Costs in Aggregated Parts.

When exporting a bill it is possible to aggregate two or more CostsMaster parts into a single part in the exported document. If two aggregated parts are limited then the combined part may have inconsistent limitation settings. CostsMaster will use the following rules to determine which settings will apply:

The settings that are generally used are those of the lowest numbered part in CostsMaster. If later parts that are to be aggregated have incompatible settings then the limitation specified in the latter parts is ignored. Incompatible settings include different types of limitation or limitations that apply to different inter partes / legal aid settings.

If the latter parts have compatible settings then, for maximum, minimum and fixed types, the limiting values will be combined together. For percentage types the percentage value of the first part only will be used.

Generally, having multiple part limitations in parts which are to be aggregated on export will lead to results you probably didn't intend, and thus should be avoided where possible.

There is one other point you should be aware of - aggregating parts with limitations where the parts have different VAT rates will result in the VAT being calculated on the limited costs at the first VAT rate defined. It will not be possible to split the limitation between the differing VAT rates.

Limiting costs in a fixed fee CLAIM1A

Any costs limitation will be ignored in a CLAIM1A where a fixed fee is paid because the fixed fee is not an item within the part that can be subject to the limitation.

Limiting costs in a Phase Bill

Any costs limitation will be shown in the main body of a Phase Bill but ignored in the Phase Summary.

Limiting costs in a Costs Budget

Any costs limitation will apply only to incurred costs and will be split between the phases pro rata. Anticipated costs will be shown as claimed and any limitation recorded will not apply to them.

Rates, Fee Earners & Counsel

Fee Earners

Ctrl + Alt + F

In CostsMaster work is recorded against “fee earners”. You can consider CostsMaster fee earners in their traditional sense (i.e. as a person in a firm of solicitors who carries out work e.g. John Smith), but they can be far more than that. They can represent work carried out at different periods of time or work done in connection with specific issues or causes of action (e.g. injunction). In short, a CostsMaster fee earner represents any distinction you would make when recording work in the traditional manner on your pad of paper.

You do not need to define all your fee earners at the start - you can add them as you go along. However it is best to try and decide upon the way you intend to break down the work at the beginning if you can.

Please note that due to internal complications, you cannot cut a fee earner from the fee earners grid, but you can copy and paste them.

The following fields are available for fee earners:

Description

This is for the user to differentiate between different fee earners on a file if necessary, it is not a description used in the bill. The Description must be unique - if you add a description that already exists (or if you paste an item copied from the grid) CostsMaster will automatically add a number to the end of the description or, if there is already a number at the end it will increase the number by one. In addition you are not allowed to use an asterisk character here as it causes issues with the electronic bill when exported to Excel.

Presets can be selected by using the Alt + Down arrow shortcut.

Initials

The initials of the fee earner. If blank when entering the description the program will attempt to guess the initials from the description entered. The asterisk character is not permitted here.

Category

Each fee earner needs to be assigned to a category for their work to appear in an exported bill. The category is the name by which the work will appear in the bill. There are a number of preset categories (and you can add your own) or you can define a new category or select an existing one that has been defined on the categories window.

When you change the category property you will be warned that any disbursements embedded in attendances which are assigned to this fee earner will have their legal aid property altered to match.

Schedule Category

This determines the category that is used for inter partes work in the schedule of inter partes work at legal aid rates.

Excluded

If a fee earner is excluded any work assigned to them will not appear in the exported bill. Any attendances assigned to an excluded fee earner will show a greyed out excluded property icon to indicate that they will not export.

Draw Attention

This property can be used to highlight items that require your attention in some manner.

Enhancement

The enhancement applied to all work assigned to this fee earner.

Large Numbers of Fee Earners

Whilst it might be tempting to record all of your fee earners within a template for ease of use, and whilst there is no actual limitation on the number of fee earners you can define, having a very large number can result in the fee earners window becoming unresponsive (unless you remove the option to show fee earners with no work in colour) and can result in export taking a very long time. This latter is exacerbated by the number of parties and parts in your file. Each party in each part has a record of routines for each fee earner and when there are very large numbers of fee earners it simply takes the program a very long time to work through all of these in order to establish whether there is any work to export.

Categories

Ctrl + Alt + C

If "fee earners" represent the way you divide up the work when you cost the file, Categories represent the way the work will appear in the finished bill. Each fee earner is assigned to a Category. This assignment can be changed at any time and more than one fee earner can be assigned to a category.

It is possible to record your work against each individual fee earner and later decide which category they belong to. And when you later discover that the fee earner you assumed to be a clerk is in fact a senior assistant solicitor you can reassign them to the correct category in a matter of seconds.

Alternatively if you want to claim work which could be argued is outside the scope of the costs Order, you can record this against a separate “fee earner”. If you want the work included in the bill assign it to an appropriate category; if you wish to exclude it simply define the category as “Unassigned”.

The following fields are available for categories:

Description / Description 2 / Description 3

The description is how the category will appear in the finished bill. In addition there are two other descriptions that can be used to have alternative text used in different places in the bill. For example you might want the Category name in the Rates Utilised section to be "Assistant Solicitor (Grade B)", whereas in the parties section it could be just "Assistant Solicitor" and in the documents section "(AS)".

The Description must be unique - if you add a description that already exists (or if you paste an item copied from the grid) CostsMaster will automatically add a number to the end of the description or, if there is already a number at the end it will increase the number by one.

LTM ID

This field can be used to directly specify the LTM ID that is used in an electronic bill, rather than have it calculated automatically by the program. Please note that where the option to export Fee Earner information is enabled, the fee earner info takes precedence and this value will not be used.

Display Rates

This determines when the rates for a particular category should be shown in a bill. The options are:

- ***When work is recorded*** - The category will only be described in the rates utilised section if there is work for that category in the part.
- ***Always*** - The category will be described in the rates utilised section even if there is no work for it in a part.
- ***Never*** - The category will never be shown in the rates utilised section.

Rate Type Displays

For each available rate type you can specify whether the rates will be shown in the rates utilised section. Please note that if the "Display Rates" setting is set to Never then these settings will have no effect - they only apply when the Display Rates setting causes a category to appear in the bill. The options are:

- Always - This rate type will always appear in the rates utilised section.
- When not zero - This rate type will only appear if the rate is greater than zero
- When different from preparation - This rate type will only appear if the rate differs from the preparation rate

- When work is recorded - This rate type will only appear when the part includes work for this category at this rate type
- Never - This rate type will never appear in the rates utilised section.

Excluded

When a category is excluded any work assigned to a fee earner that is itself assigned to the category will not be included in the exported bill. Any attendances assigned to an excluded category will show a greyed out excluded property icon to indicate that they will not export.

Draw Attention

This property can be used to highlight items that require your attention in some manner.

Legal Aid

When a category is marked as legal aid, work assigned to any fee earners that are in turn assigned to this category is considered as legal aid work and will be treated as such when exported to documents. Any fee earners assigned to a Legal Aid category (and any attendances assigned to those fee earners) will show a greyed-out version of this icon to indicate that they are legal aid by virtue of this chain of assignments.

When you change the Legal Aid property of a category you will be warned that any disbursements embedded in attendances which are assigned to this category will have their Legal Aid property altered to match.

Enhancement

The enhancement claimed on all work assigned to all fee earners that are assigned to this category. This replaces routine enhancement in CostsMaster 2 and it is recommended that it should be used for all panel member enhancement instead of Fee Earner enhancement.

Rates

Rates Ctrl + Alt + R

Part Rates Alt + R

Rates represent the amounts claimed for different classes of work (called Rate Types). Each category requires the hourly rates to be defined in this window.

Rates are multiplied by the values entered in the time/items column to generate an amount. Most rates assume that the figures entered in the time/items column are hours and minutes but certain rate types such as telephone calls, letters out, emails and letters in assume the figures entered in the time/ items column represent items and are calculated accordingly.

The available Rate Types are:

Preparation

The hourly rate used for general attendances when no other Rate Type is specified.

Advocacy

The hourly rate used for hearings at Court when the fee earner concerned conducted the hearing

Counsel

The hourly rate used for hearings at Court when Counsel conducted the hearing, or for attending conferences in Counsel's chambers.

Travelling & Waiting

The hourly rate used for time spent travelling to Court and other appointments and for waiting whilst there.

Telephone Calls

The individual item rate at which standard telephone calls are charged.

Letters Out

The individual item rate at which standard letters out are charged.

Emails Out

The individual item rate at which standard emails out are charged.

COP Routine Letters

The individual item rate at which standard routine letters out (in Court of Protection bills) are charged.

Letters In

The individual item rate at which standard letters in are charged.

Related fields :

Use Rates from

Allows you to specify that a particular part should use the rates from a different part without the need to specify them again. When a part is using rates from a different part the actual rates used are shown but the text appears greyed out and cannot be edited.

There are two rates windows:

The first shows all available categories in a list on the left. Selecting one of these shows the rates that category is using in each part in the bill. This is akin to the old Rates By Category tab in CostsMaster 2.

The other window is called the Part Rates window and shows all the rates claimed for each category within the current part. This is akin to the old Rates By Part tab in CostsMaster 2.

As well as entering the rates manually there are three ways you can make this easier:

- If you have defined rates presets in the Presets window (see later in this guide for further information) you can apply them by selecting the appropriate row of the rates grid then right clicking on the grid and selecting the rates from the presets sub-menu that appears.

- After typing in the preparation rate and with the cursor still in the preparation rate cell, press Shift + Enter. The other advocacy, counsel and travelling rates will be completed with the same figure and letters out, telephone calls and emails will appear at one-tenth of the preparation rate. Letters In remain zero. This is typically used for market rates.

Using Fee Earners, Categories & Rates

The overall relationship between these elements is:

Fee Earners > Categories > Rates

By now you should begin to see the flexibility of this system. For example it is possible to record your work against each individual fee earner and later decide which category they belong to. And when you later discover that the fee earner you assumed to be a clerk is in fact a senior assistant solicitor you can reassign them to the correct category in a matter of seconds. Alternatively if you want to claim work which could be argued is outside the scope of the costs Order, you can record this against a separate "fee earner". If you want the work included in the bill assign it to an appropriate category; if you wish to exclude it simply define the category as "Unassigned".

Example

Here is an example of one possible scenario. You have one Partner (Elizabeth Finch), two Assistant Solicitors (Alison Brown and Chris Dench) and a Trainee (Geoffrey Harris) working on a file. You should have no difficulty including the Partner and Trainee by following the steps above but what about the Assistant Solicitors?

(a) you might want to record the work done by each of them separately

or
(b) you might want to show all work done by Assistant Solicitors together

In (a) identify each one by their initials or name and then select Assistant Solicitor for both

In (b) insert “Assistant Solicitor” as the Fee Earner and the Category

If you have two sets of prescribed rates, perhaps because the solicitor obtained a franchise part way through the matter, you will obviously need two legal aid rates (e.g. LA A and LA B). However you will also need to duplicate each inter partes fee earner. This way you can assign the same category for the work in the bill but maintain the distinction for the legal aid rates in the schedule.

In this case you will record work against the A or B rates as appropriate thereby maintaining the distinction. When the bill is exported all work by, say, Elizabeth Finch (A) and Elizabeth Finch (B) will be aggregated and appear as “Partner”. In the Legal Aid Schedule this work will be claimed at the 2 different legal aid rates.

Counsel

 Ctrl + Alt + Q

Details of Counsel instructed on a matter can be also be recorded in CostsMaster. Once recorded you can apply them to disbursements or attendances to specify that the work recorded represents Counsel's Fees.

As well as designating the work as Counsel's fees, CostsMaster can also calculate and complete information relating to Counsel, such as the table of Counsel's account information on page 7 of the CLAIM1 or the List of Counsel instructed under the Family Graduated Fee Scheme on page 5 of the CLAIM1.

The following fields are available for Counsel:

Description

The name of the Counsel instructed. The Description must be unique - if you add a description that already exists (or if you paste an item copied from the grid) CostsMaster will automatically add a number to the end of the description or, if there is already a number at the end it will increase the number by one. Presets can be selected by using the Alt + Down arrow shortcut.

Export Description

In some circumstances, such as when claiming both inter partes and legal aid work, it is necessary to create two different Counsel entries for the same Counsel. In this instance you can use the Description field to distinguish between the two entries internally whilst using the Export Description to ensure that only Counsel's correct name appears in the exported bill.

LTM ID

This field can be used to directly specify the LTM ID that is used in an electronic bill, rather than have it calculated automatically by the program.

Further Information

Used to add any required detail to the LTM table in the electronic bill.

Account No.

Counsel's Legal Aid Account Number. Used on forms such as the CLAIM1.

Success Fee Percentage

If Counsel is instructed under a success fee you can specify the percentage success fee here. Any work assigned to this Counsel will then attract a success fee *even if it is in a part to which a solicitor's success fee has not been assigned*. Please note, therefore, that if some of Counsel's fees are not subject to the success fee it will be necessary to create a separate Counsel entry for this purpose.

Success Fee VAT Rate

If a success fee is claimed this determines the VAT rate that is used. The default is to use the VAT rate of the part in which the fee is claimed but it is also possible to specify a different rate which can be used where Counsel has charged VAT at a different VAT rate to that of the part in which you want to claim the fee. You can select from three common VAT rates in the drop down box or enter any VAT rate directly.

Success Fee Location

This setting determines where Counsel's success fees are claimed in a old style column bill. This option doesn't apply to the electronic bill where the success fee is calculated and shown on a line by line basis.

There are three options available:

- **With Solicitor's success fees** - Counsel's fees within a part assigned to a solicitor's success fee will be claimed immediately after the solicitor's success fees are claimed. It will be calculated on the total fees assigned to this Counsel in all parts that are assigned to the same solicitor's success fee. If there are Counsel's success fees in a part that is not assigned to a solicitor's success fee the fees will be claimed at the end of that part.
- **End of Each Relevant Part** - the success fee will be claimed at the end of each part that utilises the fee. It will be calculated only on the

fees assigned to this Counsel within that part.

- **End of Bill** - the success fee will be claimed in the last part of the exported bill even if that part is not assigned to this or any other success fee. It will be calculated on all fees assigned to this Counsel throughout the bill.

Rates

The hourly rates used for calculating Counsel's fees when claimed as timed attendances. Separate rates can be defined for all available rate types as explained in the section on rates, although many of these would not normally be used for Counsel.

Leading Counsel

This property specifies whether this Counsel is a leading counsel. The totals of Counsel so designated are usually distinguished from junior counsel in exported documents.

FGF

This property specifies whether Counsel was instructed under the Family Graduated Fee Scheme. If this property is set this Counsel's description will automatically appear in the appropriate box on page 5 of the CLAIM1 form. Setting this property automatically sets the legal aid property.

Legal Aid

This property specifies whether the work assigned to this Counsel is legal aid. De-selecting this property will also remove the FGF property if set. If you are preparing a bill comprising both inter partes and legal aid work and you wish to claim some Counsel fees inter partes and some legal aid it will be necessary to create two Counsel entries and make one legal aid. In this circumstance you can utilise the Export Description to ensure only Counsel's real name appears in the exported bill whilst using different Descriptions to help you distinguish between the two within CostsMaster.

Enhancement

Introduction

Enhancement is the percentage increase that can be claimed on legally aided costs as prescribed by the Legal Aid Agency. It has no counterpart in inter partes costs and will be applied only to work that is specified as legal aid or, in the case of the Schedule of inter partes costs at legal aid rates, to inter partes costs when re-calculated at legal aid rates.

The enhancement feature has changed somewhat since CostsMaster 2 in order to better implement the changes to the Rules since CostsMaster was first designed. Full details of the changes can be found in the section Changes in Enhancement Since Version 2.

Types of Enhancement

There are no less than seven locations where enhancement can be claimed in CostsMaster. Different values can be specified for each location and the total enhancement claimed for an item will be the cumulative total of all locations that apply to the relevant attendance.

The locations where enhancement can be claimed are:

Bill

Enhancement claimed here will be applied to all work in the bill except for items that have been excluded. This is analogous to global enhancement from previous versions of CostsMaster.

Part

Enhancement claimed here will apply to all work within the selected part.

Fee Earner

Enhancement claimed here will apply to all work done by this fee earner.

Category

Enhancement claimed here will apply to all work assigned to this category on export.

Party

Enhancement claimed here will apply to all work recorded against this particular party.

Periodic

Enhancement claimed here will apply to any attendances whose date falls within the period defined.

Specific

This enhancement is applied to specific attendances. It allows you to apply enhancement for a situation not covered by the above six options. It is similar to individual enhancement in CostsMaster 2 but specific enhancement does not need to be defined beforehand - it is enough to type the figure into the enhancement column. Whilst any specific enhancement is added to the other types of enhancement claimed, you can of course use it on its own by just typing the enhancement for each attendance in the enhancement column.

Claiming Enhancement

Whereas in previous versions of the program enhancement could be specified only for preparation items and procedural steps, in this version it is possible to specify the amount of enhancement separately for each rate type. This gives the draftsman complete control of which items attract enhancement and the amounts that are claimed for each.

When an enhancement column is visible in a grid and you click or tab into that column an edit button will appear. There are two ways to enter the figures for enhancement:

The detailed method
If you click on the button you will be taken to the enhancement set up window where detailed information can be input for each of the rate types or the enhancement exclusion settings can be specified.

The quick method
You can enter the enhancement figure directly into the edit box. For attendances and categories this will set all rate types to have the same value but for other enhancement types it will set only the preparation and advocacy rate types to the value you have entered. This corresponds to the way most people will use the program but should you need to do something different you always have the detailed method to hand.

Excluding Enhancement

Wherever enhancement can be claimed it can also be excluded. There are four settings available:

No
Yes
Never
Always

When deciding if enhancement should be excluded CostsMaster considers all the places where enhancement is claimed.

If all the locations have the excluded property set to "No" then any enhancement defined at each of those locations is claimed. However, if any one of the locations has the excluded property set to "Yes" then no enhancement will be claimed.

But what if there are special circumstances? Perhaps you want to claim routine enhancement for a panel member fee earner even where other forms of enhancement are excluded; or perhaps there was a period for which all enhancement has been disallowed. This is where you can use the other options, "never" and "always".

If any of the locations have the excluded property set to "yes" but one of the locations has excluded set to "never", then no enhancement is claimed for that item *except any defined in the location where excluded is set to "never".* In our first example above, if you wanted to claim routine enhancement for all work carried out by a certain fee earner you could set up that fee earner as having 15% routine enhancement on all items then set the excluded property to "never".

However if any of the locations have the excluded property set to "always" then no enhancement will be claimed whatsoever in any circumstances.

It is also possible to exclude enhancement for an attendance by typing "X" in the enhancement box. This sets exclude to either "Yes" or "Always" depending on the option defined in the Local Settings window.

Changes In Enhancement Since Version 2

There are various changes to the way that enhancement is claimed in CostsMaster version 3 and later compared with how this feature worked in CostsMaster 2.

Enhancement Window

The Enhancement window does not exist, its functions being carried out elsewhere.

Enhancement Enabled Option (Enhancement Window)

Enhancement is always enabled automatically for legal aid bills. You can disable it for the whole bill by setting Bill enhancement to "exclude always".

Claim Enhancement for a Part Option (Edit Part Window)

This has been replaced by part enhancement. This is automatically enabled for a part but can be disabled by setting exclude enhancement to "exclude always".

Exclude a party from enhancement (Edit Party Window)

This is covered by party enhancement and for each party you can opt to exclude enhancement by setting exclude enhancement to "exclude always".

Global enhancement (Enhancement Window)

This has been replaced by bill enhancement, however the principle remains the same. In the Bill window any enhancement claimed will apply to all work in the bill, except for items that have been excluded.

Individual enhancement (Attendances)

This has been replaced by specific enhancement. For every attendance in the bill you can apply specific enhancement. This is particularly useful if you feel that certain attendances or work done merits additional enhancement to that already claimed. Unlike individual enhancement in CostsMaster 2, specific enhancement does not need to be defined beforehand.

Routine enhancement (Rates & Fee Earners Window - Categories tab)

This has been replaced by category enhancement as defined on the Categories Window. All enhancement locations allow you to specify enhancement for routine items and travelling and waiting.

Enhancement justification

This can now be found on the narratives window.

Don't exclude fee earner enhancement

This is now covered by the exclude options within fee earner and / or category enhancement.

Enhancement Set-Up Window

Enhancement can be claimed in many different ways, but each will bring you to the Enhancement Set-Up Window.

This window allows you to specify different levels of enhancement for each of the available rate types.

As well as specifying when to claim enhancement, this window can also be used to specify when *not* to claim it. To do this, there is a drop-down box labelled "Excluded". This has four settings:

No
Yes
Never
Always

Where an item is excluded the values in the other boxes have no relevance.

Chapter 5

Recording work

General Information

Entering Dates

The way in which CostsMaster handles dates allows you to enter them in a variety of ways to suit the situation.

Whole dates

Most of the time you will know the exact date on which an item of work was carried out. In this case you can enter the date in the format dd/mm/yy or dd/mm/yyyy but you can also use long or short month names ("Sep", "September") and long days as well ("21st")

The valid elements that can separate a date element are not limited to forward slashes and can be defined in the Local Settings Window where there is a page of options relating to dates.

Omitting the Year

Within grids you may omit the year and CostsMaster will attempt to guess it based on the year of any previous item and the year of the last date entered anywhere on the file. In order to establish the date that is intended CostsMaster uses the following rules:

1. If the year of the previous item when added to the dd/mm gives a date that is in the future the year before is used instead

2. If the year of the previous item when added to the dd/mm gives a date that is newer than the previous date or older than the previous date by an amount within the Date Window settings as defined in the Local Settings Window then the year of the previous date is used otherwise the next year is used to make the intended date.

Partial dates

If the full date is not known it is possible to enter part of a date and CostsMaster will still attempt to identify the elements you have entered and format them appropriately on export.

Date ranges

Sometimes, you may have a note of work that was done over a range of dates on a series of particular dates. Entering this in CostsMaster is no problem. Just enter the dates separated by whatever characters you want to appear on export (e.g. 1/12/2012 - 5/12/2012) and CostsMaster will do the rest. You can even enter a range of partial dates (e.g. "Nov - Dec 2012") or a series of dates (e.g. "1-3 & 5/12/12"). As you can see from the last example you can enter ranges that include repeating elements only once and CostsMaster will work out the correct dates.

When you merge items that include dates that have ranges CostsMaster will be able to understand the range and merge the dates accordingly provided the date range is separated by the word "to" or a dash "-". If the range is indicated by some other method it will not be recognised by the merge procedure and you may need to adjust the resulting date manually in order to sow it in an optimum manner.

Functions that work on dates

If you have specified a date range for an item CostsMaster understands that there are a number of dates, whole or partial, that apply to that item. Functions that work on dates have to decide which of the many dates is the effective date and do so as follows:

Functions that divide work by date (such as Splitting parts) use the earliest possible date as the effective date.

Functions that check whether a date is within a range of dates (such as checking whether the date of an attendance is within the range of dates defined for a part) will only consider a date included if both its earliest and latest dates are within the specified range.

Functions that order dates (such as sorting) will arrange the dates by each element in turn so that if two items have the same first date, the items are then sorted by the second date etc. with any item that doesn't have a corresponding date coming first.

Entering text in date fields

By default text is not permitted in date fields but this option can be changed in the Local Settings Window. If you have allowed text to be entered it is even possible to describe a date as "About December 2012" or even "various" if your fee earner is really bad at making attendance notes!

If you are going to enter text in date fields you might want to look at the values defined for date separators in the Local Settings window. It is highly inadvisable to use any of these characters other than for the purpose of separating date elements as to do so will cause CostsMaster to misunderstand your intentions. It is for this reason that the comma is no longer included by default in the date separators and it may be that you want to remove the full stop also from this list if you use this in a date other than as a separator.

Display of dates

Within the program the date will be displayed in the format defined by the Windows short date format. This is usually dd/mm/yyyy for more recent Windows versions and dd/mm/yy for older versions . This setting can be changed by going to Control panel and clicking Regional settings.

NOTE: if your computer is set to use a different Windows date format the program may behave unpredictably with dates.

When Exporting the bill all dates are converted according to the format specified in the relevant export phrase. This gives you complete control over the look of dates in your exported document and it is quite simple to vary the date format depending on the type of document you are exporting.

Entering Time

Time can be entered in a variety of ways. Hours and minutes can be separated by a colon, full stop, comma or semi colon. Time entered with a valid separator will always be interpreted in the same way:

These examples are for 1 hour and 12 minutes

```
Minutes               :72
Hours and minutes   1:12
Units                1:2
```

These examples are for 48 minutes:

Minutes	:48
Hours and minutes	0:48
Units	:8

Time entered without a separator (i.e. whole numbers) will be interpreted as either hours minutes or units as defined by the user. The default is minutes. This can be set on the Local settings menu. The number of minutes in a unit can be also be defined. See the section on customizing the program later in this guide for further details.

Using the standard designation above it is not possible to enter fractions of an hour that require two digits as the program will interpret this a meaning minutes. e.g 1.2 will be interpreted as 1:12 but 1.25 will be interpreted as 1:25 rather than 1:15. You can get around this by using the "f" character as a separator so that 1f25 will be interpreted as 1:15. When entering time in this manner any fractional amount is rounded up to the nearest minute *at the time of entry*.

Displaying time

The program will always display time in the format h:mm e.g. 1:24 or 0:48

Time entered as 0 will be displayed as such when exported. This is a safety feature as it makes it easy to spot a figure that has been left blank accidentally. Should you wish to leave a figure blank on export enter the time as a dash , i.e. "-".

When an attendance is assigned a rate type such as telephone calls, letters out, emails out or letters in, the Time / Items column is used to record the number of items of that particular type.

Rounding

CostsMaster does not round figures until they appear in an exported bill. When they are rounded that amount is carried forward for future calculations so that the figures on paper all add up correctly.

CostsMaster offers two types of rounding. Common Rounding is the method used in the past but it now also offers Bankers' Rounding. Both methods are similar save for cases where the third digit is a 5 and there are no other digits greater than 0. In Common rounding this will be rounded up but in bankers rounding it will be rounded up only if the second digit is an odd number.

Bankers' rounding is said to give results that are statistically more even.

The Practical Effects Of Rounding

Because of the way that different forms of bill are laid out the total costs for the same file will differ when exported as different documents. This is particularly relevant for forms such as the CLAIM1 where each attendance is calculated and rounded and the rounded amount is then recalculated with enhancement and rounded again. The more "rounded" the rates are the less the rounding effect. The current care rates are especially prone to rounding anomalies of this kind.

There is now an Option to specify whether figures entered into the Rates window are rounded. This primarily affects the display of rates in that window as not all exported documents will export the unrounded figures.

This is all brought into sharp focus when costs for a CLAIM1 are also used in a Case Plan. In the latter the times are aggregated for each fee earner at a particular rate and enhancement resulting in far fewer rounding calculations. The result is a significant difference between the profit costs on the CLAIM1 and in Part 1 of the Case Plan. In one sample bill with profit costs of approximately £10,000 the Case Plan costs were 91p less using Common Rounding but 45p more using Bankers' Rounding. *(In the example, if you wanted the costs in the case plan to match exactly it is possible to fix the costs of a part at a set amount using the Part Limitation window.)*

Rounding and Running Totals

In CostsMaster the running totals are calculated by first calculating each item individually. This is done because it is considerably faster and because the type of bill being exported is not known until export. Thus the effects of rounding mean that the running totals are only approximate.

Abbreviations

Alt + Shift + A

CostsMaster lets you define your own abbreviations which can be used to speed up the time you spend typing. This is an invaluable feature in CostsMaster that helps the costs draftsman to become even more efficient and productive.

Abbreviations can be defined in the Edit Abbreviations Window.

They can be applied to the following data:

- The description column of any grid (including the additional descriptions for categories and parties)
- The narratives (including enhancement description and additional narratives for a case plan)
- The miscellaneous attendances heading for a party
- The payee field of a disbursement
- The brief description for a procedural step
- The status of a case party
- The scratch pad
- The text of a note

Let's assume you have defined the following abbreviations:

clt	client
dftg	drafting
stmt	statement

If you typed the following in the documents grid:

Dftg stmt for clt

When you left the cell it would be expanded to:

Drafting statement for client

Please note that if the first letter of the abbreviation is capitalised, so will the first letter of the expanded text. In order for this to work all abbreviations and their expanded descriptions should be entered in lower case characters, except where a word is always capitalised.

Be careful never to define an abbreviation that is a word you might use. For example if you defined app as an abbreviation for application you would not be able to refer to an APP 8 – it would appear as Application 8!

Plurals must be defined separately from the singular form. Possessives too must be defined separately but may become automatic in subsequent versions.

Furthermore you cannot define any abbreviation that appears on the list of

Legal Aid codes in the Local Settings window. These are treated differently for compatibility with the CLAIM1.

You can however alter the preset definition of these codes and can use them as abbreviations, with one caveat:

- you must type them entirely in upper case for them to be recognised. This is because some of the codes could be confused with words (ACT would cause "perusing provisions of Housing Act" to appear as "perusing provisions of Housing Attending Court"!).

Notes

Ctrl + Shift + O

Each item in CostsMaster has the ability to record notes against it. These can be used as reminders to yourself or as notes to someone checking the file. You can also export them to a RTF, PDF or XLSX document as an annotated note.

In grids an item with a note will have a coloured triangle in the top right corner of the properties column. This triangle is coloured yellow for public notes, red for private notes and orange for notes of both types.

Notes have just two fields:

Description

This is the text of the note

Private

Private notes are notes intended for your benefit only. Private notes are not included in any exported document.

Attendances & Disbursements

Phases, Tasks And Activities

Budget Phases -v- JCode Phases -v- New Bill Phases

Lord Justice Jackson's Review of Civil Litigation Costs proposed the use of phases, tasks and activities when recording and claiming work in order to more efficiently manage the recovery of costs. A scheme of costs budgeting was introduced which requires the grouping of work by phases.

A new form bill of costs was later piloted driven by a set of phase, task and activity/expense codes (known as the J-Codes). The J-Code phases are similar to the costs budget phases but differ in a number of ways.

Following feedback from users a revised form of bill (the "new bill") has been introduced with a similar set of tasks, simplified activities and expenses and phases more akin to the costs budget phases.

If this state of affairs seems confusing then fear not, as CostsMaster supports all three types of phases meaning you can produce fully compliant bills and budgets in any format whatever the basis of your time recording.

There is a button on the Control Centre that lets you specify whether you are showing (1) Budget Phases, (2) New Bill Phases, Tasks, Activities & Expenses or (3) J-Codes. You can change this setting as you go and the values for phases, task and activity will instantly update to match the new settings. You can even enter data based on one type of settings when showing another e.g. enter the J-Code whilst showing New Bill values.

Recording Phases

If you are showing Budget Phases then you will not have any tasks, activities and expenses visible. This setting is intended for situations where you are preparing a costs budget and you don't expect the work to form part of a bill at a later date.

If you are showing New bill phases or J-Codes then it is not actually necessary to manually record the phase. When a task is selected the phase is inferred automatically. There are however several situations where you might want to manually specify a phase

- If you specify a phase before specifying a task, the list of tasks you have to chose from is restricted to those that match the phase. You might therefore want to specify the phase as a filter to make it easier to select the correct task
- If you are tagging an item which will fall under a contingent phase in the costs budget then, in addition to setting the task you will also need to specify the contingent phase.

Recording Tasks, Activities and Expenses

In CostsMaster, there are several ways to record tasks, activities and expenses:

- Select the item from a drop down list. As stated above it is possible to limit the number of tasks shown by first selecting a phase.
- If you know the text of the item you want to select you can begin typing it in and the first match will be selected automatically
- If you know the J-Code you can type that in directly (this works even if the J code you are entering is not compatible with the currently set phase and even if you are not currently showing J-Codes).
- You can define key-word presets that will automatically set the appropriate task, activity or expense when that word is found in the description. For activities, it is also possible to specify the default value that will be used in three separate locations if no other match is found. By spending a little time adding and customising the presets to match the words that you use you can find that a large proportion of work is tagged automatically without any intervention. This behaviour is on by default but can be turned off in the Presets window.

When importing work from a time recording system these presets can optionally be used to tag values in the same way. They are also used by the tool to apply tasks and activities to the entire file, both of which let you quickly deal with historical work that has not been tagged.

If you are unsure about which code to use, you can hover over an item from the drop down list and a full description will be displayed.

Contingent Phases vs New Bill Phases & Tasks

Contingent Phases for costs budgets usually apply to interim applications that may or may not occur during the course of the action. If the work goes on to form part of an electronic bill then the work is no longer contingent and will need to be tagged with the appropriate New Bill task for that type of application, as the New Bill has a specific phase for interim applications. As long as the Phase remains set to the correct Contingent Phase and the Task set to the correct New Bill Task, CostsMaster will use the latter within the New Bill but will use the Budget Phase for the Budget comparison section in the document.

Default Values

It is possible to specify defaults at various places within CostsMaster. Doing this will cause any new inter partes attendances or disbursements within that item to automatically receive the default code.The defaults are applied when the item is first created, so will not apply if the current default fee earner is assigned to a Legal Aid Category.

Control Centre/Edit Bill Window

The default phase for the entire file can be recorded here. If specified then any newly created item will receive the default phase (unless there is a different phase specified in one of the locations described below). Changing this value has no effect on any existing items. Changing this value as you move through a file allows the tasks of newly created items to be filtered to only show compatible items making it easier to select the item you want. If you are happy selecting from the entire list of tasks there is no need to set this value.

Parts

You can also set the default phase separately for parts. You might want to do this if you had decided to recorded work from each phase in a different part. If a default phase is set for a part it will override any default phase set in the Control Centre. Changing this value affects only newly created items.

Procedural Steps

Although not described as defaults, it is possible to specify the phase and task for a procedural step and if done this will have an effect on the attendances and disbursements within the step. For hearings you will probably want to specify the task for the procedural step as all attendances and disbursements will most likely require the same task. Setting the phase acts as a filter to limit the number of tasks displayed. Unlike the defaults mentioned above, if you alter the phase or task for a procedural step that has attendances or disbursements the program will optionally replace the codes of attendances and disbursements within that step. You can specify the circumstances when you are asked and when this happens automatically in the Local Settings window.

Parties

Parties have a Phase and Activity field which, whilst not described as defaults, will also influence the phase and activity of any attendances or disbursements recorded for that party. You will almost certainly want to specify the activity for each party, and this is done automatically via key word matching against presets when a description is entered. Some people like to use parties as a way of separating work by phase and in this situation you would want to specify the phase here. Again, when altering the phase or activity here, the program will optionally replace the codes of any work for that party as determined in the Local Settings window.

Automatically applying Phases, tasks and activities

CostsMaster includes a tool that will automatically tag work with phases, tasks and activities. It does this by looking for key words in the description of the work. These can be customised by the user to improve the detection rate. Please see the separate section for further details.

US Codes

The J-Codes are based on the UTBMS code set, used by many large, international firms (particularly in the US) for e-Billing. If you are used to recording US codes, or if you are importing work from a time recording system where the US codes have been used, CostsMaster will automatically convert them to the UK equivalents.

Attendances

In CostsMaster all attendances have identical fields irrespective of where they are related. This makes the program more consistent to use and also facilitates the copying and moving of data from one location to another.

Attendances have the following fields:

Date

The date of the attendance. Please see Entering Dates for more information. The SHift + Enter shortcut in an attendance grid will use the date of any previous item.

Description

The description of the work that was done. Depending on the way the attendance is formatted for export this may be optional in some cases. Using the Shift + Enter Shortcut enters a document tag.

Time / Item

The time spent in minutes (or the number of items for unitary rate types). See entering time for more information.

Lump Sum

An optional lump sum that will appear with the attendance. If a lump sum is recorded then any values entered in the time and enhancement columns will be ignored and will appeared greyed out.

Fee Earner

The fee earner to which this attendance is assigned. An attendance must be assigned to a fee earner for the work to appear in the exported bill. Unlike CostsMaster 2 it is not necessary to assign the attendance to a fee earner immediately - there is an "Unassigned" option for any work where you do not as yet know which fee earner to assign it to.

If the fee earner you wish to select has not yet been created you can simply type the name in the box and you will be asked if you want to create it.

Counsel

As well as recording solicitors' time you can also record Counsel fees as a timed attendance. To do this simply leave the fee earner as "unassigned" and instead assign the Counsel column to the name of a Counsel. If you select a Counsel when the fee earner is not unassigned the program will ask you if you intended to do this and if you ask yes, the fee earner will be marked as "unassigned" automatically.

Counsel's fees recorded in this manner will be calculated using the rate defined for this Counsel in the Counsel window and will usually show the calculation in the exported bill. They will still be treated as Counsel fees in the same way as if they had been created as a disbursement.

Rate Type

The rate type is the rate element (preparation, advocacy, travelling & waiting) that will be used for this attendance. In CostsMaster 2 this was fixed by the location of the attendance but in this version an attendance will merely default to the most common usage for a location and the draftsman is free to alter it. This makes it possible, for example, to claim attendances at Court at preparation rate or to include travelling & waiting next to the attendance it relates to etc.

It is also possible to use telephone calls, letters out, emails and letters in rate types in an attendance. If such a rate type is selected it will be assumed that the figure entered in the time/items column represents items and will be calculated as such. Please note that if you change a rate type from say, preparation to telephone calls, and you have already recorded say 30 minutes for that attendance it will now be recalculated as if it referred to 30 items which will give a different result.

Phase, Task & Activity

These fields allow you to assign the attendance to a particular phase, task or activity for the purposes of a costs budget or electronic bill. Please see the section on phases, tasks and activities for further information.

Contingent phases can be added manually to the list of phases in the Costs Budget Window, or, whilst showing Budget Phases in the Control Centre, you can simply type the name of the phase into the Phase field for an attendance, whereupon you will be asked to confirm whether you wish to create the contingent phase.

Entry No

For electronic bills, this field allows you to specify a number or code to tie together two or more attendances that are recorded on a single attendance note or time recording entry but which have had to be split because they cover more than one task or activity or for some other reason. By filtering this field in an electronic bill it is easy to find all related items at a later date.

Recording an Entry No is a prerequisite for having CostsMaster calculate the Entry Alloc % value - which is the percentage of an original attendance attributed to this particular entry.

Legal Aid Activity

This column allows you to specify the legal aid activity that will be attributed to this item in a CCMS claim. As well as selecting from a range of activities, CostsMaster will attempt to set the code automatically when changing the description for an item where the actvity has not been set. It does this by virtue of a list of keyword/actvity pairs which are defined in the Abbreviations and Legal Aid Codes Window.

In the event you need to prepare a CLAIM1/CLAIM1A CostsMaster will convert the activity to the appropriate code (see CCMS Activities and CLAIM1 Codes).

Disbursements

Each attendance can have one or more disbursements embedded within it. These disbursements will export to a bill immediately after the attendance and are useful for situations where you want to keep the disbursement next to the attendance to which it relates.

Please note that embedding a disbursement within an attendance tightly binds that disbursement to the attendance. If the attendance is subsequently deleted the disbursement will be too.

Enhancement

The specific enhancement that is applied to this attendance in addition to all other enhancement that it might attract.

If you hover the mouse over the enhancement column of an attendance a hint will be displayed showing how the enhancement claim is made up.

Index

A numeric value that can be used to specify the order that exported items will appear in when they have the same date.

Claim1 Column

Using this field it is possible to specify which column of the schedule of time spent in a CLAIM1 this item will appear in. When the legal aid code is set for an item (either because you set it directly or because CostsMaster guessed it as a result of text typed in the description field, CostsMaster will guess the column that will be used based on the Code used. This will be correct for most items but this column gives you the opportunity to alter this when you want.

N260 Section

This field allows you to specify in which section in an N260 (statement of costs for summary assessment) this item should appear. Options are:

- Not specified,
- Documents
- Hearings
- Travel & Waiting
- Site Inspections
- Party Attendances
- Party Telephones
- Party Attendances

If no value is specified the location of the attendance is used to determine which section the work should appear in. It is therefore only necessary to specify these values for Site Inspections, or where you want the work to appear in a different section than would be the case if left to Not Specified.

N260 Party

This field is used when the N260 Section is set to Party Attendances, Party Telephones or Party Attendances. Options are:

- Not specified,
- Client
- Opponents
- Others

Doc Ref

This field is intended to hold a reference to an attendance note or similar in a bundle or document management system. Anything recorded here will appear as a note in the exported Excel document as a note attached to the description field.

Estimated

Whether the attendance time was estimated by the draftsman rather than coming from a file note.

Print Out

Whether the attendance time came from a computer print out rather than a file note.

Additional Information

When preparing a CLAIM1 or CLAIM1A form, this property determines whether the description should be used in the additional information table. By default CostsMaster will attempt to set this automatically whenever you set the legal aid code for an attendance. It determines whether the property should be set by virtue of a list of codes defined in the Abbreviations and Legal Aid Codes window.

When preparing a CCMS claim, this property can be used to determine whether the description should be included in the Supporting Documentation.

Recoverability

This property will let you tag an inter partes item with three levels based on its chances of recovery. Please see the section on Recoverability for further details.

Solicitor / Client

This property will let you tag an inter partes item as being solicitor/client. As such it will not be included in bills or costs budgets but will be included in the client totals on the costs budget window enabling you to manage any budget agreed with your client.

Excluded

An excluded attendance will not appear in the exported bill.

Draw Attention

This property can be used to highlight items that require your attention in some manner.

Summary Columns

Some grids (such as procedural steps) include an "Attendances" column which displays a summary of the attendances included. When you click in the cell you cannot edit the amount but a button appears that will take you to the attendances window where each attendance can be altered.

The summary text shows the number of hours and minutes recorded for all the attendances within the item. In addition if any lump sums are recorded the total of these is shown in parenthesis. Furthermore, the total of any embedded disbursements are shown in square brackets.

Disbursements

Disbursements can be recorded at various places within CostsMaster. The fields available are:

Description

A description of the disbursement. This can be a full description or it can utilise the additional properties to create a compound description on export. Please see the section on export templates for further details. The Shift + Enter shortcut can be used to enter a mileage claim.

Amount

The amount of the disbursement. If you hit the Shift + Enter keys while the cursor is in this field the program will assume that the figure you have entered is inclusive of VAT and will split out the basic and VAT elements.

Recoverability

This field can be used to reduce the percentage of this disbursement claimed.

VAT

The VAT claimed on the disbursement. If you hit the Shift + Enter keys while the cursor is in this field the program will calculate the VAT on the amount entered in the Amount field.

For exported documents that distinguish between disbursements that attract VAT and those that do not (Such as the CLAIM1), it is possible to record a disbursement that is subject to VAT where you do not yet know the amount and have it appear in the correct section by recording a VAT amount but no principal. In this case the program will know not to include the VAT in the exported bill.

Assessed Amount / Assessed VAT

The amount and VAT of the disbursement as assessed. These fields are for use in the CLAIM1 & CLAIM1A only and allow you to automatically calculate the figures for a claim for costs assessed by the Court. Simply complete these fields with the amount at which the disbursement was assessed, then tick the "calculate automatically" box in the Assessed Costs page of the Legal Aid Claim Settings window.

If the disbursement has been assessed as drawn you can quickly populate the Assessed fields by using the "Mark Assessed as Drawn" Tool, the equivalent entry on the right-click pop up menu in the grid or clicking the button of the same name in the Edit Disbursements window. If using the tool or if more than one disbursement is selected you will be asked whether you want to set this for all disbursements (in which case any existing figures will be overwritten) or only for those disbursements with a zero assessed amount. In this way it is a simple matter to manually set the figures for any disbursements that have been reduced on assessment, and then set all others to the amounts claimed.

Percentage

It is possible to record a disbursement in full but claim only a percentage by setting this field to the percentage you want claimed. In an exported bill the disbursement will export with the full amount shown in the description together with details of the percentage claimed. If a percentage is defined, the grid will only show the full amount of the disbursement when the cursor is in the cell, other times it will show the amount that will be claimed as a result of the percentage reduction. As well as entering the percentage directly it is possible to enter a forward slash followed by the number by which the disbursement should be divided, and CostsMaster will then calculate the percentage.

The Shift + Enter shortcut recalculates the amount as if the figure that was entered was the amount after the percentage was applied. This is intended for cases where the invoice shows the amounts at the reduced rate. This will not calculate the VAT unless it has already been set but you can do this by using Shift + Ctrl + Enter instead.

Counsel

This drop down box contains a list of all the Counsel defined in the Counsel window. Selecting the name of a Counsel designates this disbursement as representing Counsel's fees. If the Counsel you want to select is not in the list you can simply type the name and you will be asked if you want to create the Counsel. If you do not need to distinguish between counsel you can simply create a counsel called, say, "Counsel" and assign disbursements to it to designate them as Counsel fees.

Counsel Type (for N260A/B only)

The second version of the N260A & N260B forms introduced four new "tasks" for Counsel. As these values bear no relation to the existing tasks we have chosen to describe them instead as "type". The value is specified here from the values in the drop down box.

Phase, Task & Expense

This field allows you to assign the attendance to a particular phase for the purposes of a costs budget. Please see the section on phases, tasks & activities for further information.

Entry No

For electronic bills, this field allows you to specify a number or code to tie together two or more attendances that are recorded on a single attendance note or time recording entry but which have had to be split because they cover more than one task or activity or for some other reason. By filtering this field in an electronic bill it is easy to find all related items at a later date.

Recording an Entry No is a prerequisite far having CostsMaster calculate the Entry Alloc % value - which is the percentage of an original attendance attributed to this particular entry.

Payee

Optional field for recording who the disbursement was paid to

Invoice Date

Optional field for recording the date of any invoice relating to the disbursement.

Invoice No

Optional field for recording the number of any invoice relating to the disbursement.

Date Paid

Optional Field for recording the date the disbursement was paid

Disbursement Group and Disbursement Type

These fields are used to specify the type of disbursement for Legal Aid claims and the type of expert fee for the Costs Budget. The pre-set values correspond to the LAA list of expert types but for inter partes work you can type in other values if the expert you want is not listed.

The Disbursement Group value is optional for inter partes work but can be used as a filter to limit the number of options in the Disbursement Type drop down list.

Expert Type

For budgets, this value determines which column in the expert fee summary this item will be shown in or whether it appears as a "expert disbursement". Options are:

- Report
- Conference
- Joint Statement
- Disbursement

It is shown only when the Expert Fee property has been set, but the drop down items are available at all times and selecting one will automatically turn on the Expert Fees property.

Other Costs Description

For Legal Aid claims, where a disbursement type of "other" is selected, further information about the type of expert can be specified here.

Prep Rate

The rate used by the Expert. The Shift + Enter shortcut can be used to calculate the Expert amount from the time and rate. VAT is calculated if it has already been set or can be forced by using Shift + Ctrl + Enter.

Prep Costs

The amount charged by the expert for preparation of reports etc.

Court Rate

The rate used by the expert for attending Court

Court Costs

The amount charged by the expert for attending Court to give evidence.

Travel Costs

The amount charged by the expert for travel expenses

Other Costs

Any other amounts charged by the expert.

Expert Time

This field is used in Costs Budgets to specify the time spent by an expert. It is used for information purposes in the exported document and does not form the basis of any calculation. You must always enter the amount claimed by the expert as a disbursement in the usual way, but using the Shift + Enter shortcut will calculate this automatically from the expert time and rate. VAT is calculated if it has already been set or can be forced by using Shift + Ctrl + Enter.

CMS Activity

This column is populated by data from a time recording system. It records the Activity value recorded on the time recording system and is shown here for information only.

Doc Ref

This field is intended to hold a reference to an invoice or similar in a bundle or document management system. Anything recorded here will appear as a note in the exported Excel document as a note attached to the description field.

Explanation

This field is used to provide an explanation for the disbursement in Section B of the Precedent U.

Estimated

Whether the disbursement amount was estimated by the draftsman rather than coming from an invoice or fee note.

Legal Aid

For Legal Aid & Inter Partes bills this determines if the disbursement is claimed against the Legal Aid Agency or inter partes. When creating a new disbursement the Legal Aid property will be set if the current default fee earner (as defined in the Control Centre) is assigned to a Legal Aid Category.

For Counsel fees the Legal Aid status of the disbursement is determined by the Legal Aid property of the Counsel to which it is assigned, rather than this property directly. As a result if the Counsel to which it is assigned is marked as legal aid the property icon will show in grey as an indication of that status.

Invoice

Optional field for specifying whether an invoice is available for this disbursement

Paid

Optional field for specifying whether this disbursement has been paid. Will be set automatically if the description contains the word "Paid".

Receipt

Optional field for specifying whether there is a receipt for this disbursement.

The optional disbursement fields can be used in place of information in the description field. This will allow you to

a) create an export phrase that builds the description dynamically and
b) use the optional fields in a disbursement report to the client showing which disbursements are missing receipts, which have no invoices, which haven't yet been paid etc.

Expert Fees

Specifies whether the disbursement relates to Expert Fees. Will be set automatically if the description contains the word "Report".

Court Fees

Specifies whether the disbursement relates to Court Fees (for use in Costs Budgets).

Inter Partes Recoverability

This property will let you tag an inter partes item with three levels based on its chances of recovery. Please see the section on Recoverability for further details.

Solicitor / Client

This property will let you tag an inter partes item as being solicitor/client. As such it will not be included in bills or costs budgets but will be included in the client totals on the costs budget window enabling you to manage any budget agreed with your client.

Excluded

Any disbursement that is excluded will not appear in the exported bill.

Draw Attention

This property can be used to highlight items that require your attention in some manner.

Pre Agreed

This property is used to indicate that the amounts claimed in this disbursement have already been agreed by the LAA in an events case plan.

Summary Columns

Some grids (such as procedural steps) include a "Disbursements" column which displays a summary of the disbursements included. When you click in the cell you cannot edit the amount but a button appears that will take you to the disbursements window where each disbursement can be altered.

The summary text shows the total amount of all the disbursements within the item with any VAT shown in parenthesis.

Recoverability

For inter partes work, it is now possible to tag items with an indication of their recoverability. This can be done by means of three coloured properties—green, yellow and red—or by specifying the percentage of the amount which you think is recoverable. All items are tagged green by default indicating they are 100% recoverable, but you can chose to tag them yellow (50% recoverable) or red (0% recoverable). If you enter a value which is more than 0% but less than 100%, the item will be tagged yellow (to indicate that it is at least partly recoverable)

Although the value stored is a percentage, it is possible to enter this value as an actual amount using the Shift + Enter shortcut. For example, if an attendance had time recorded of 48 minutes and you feel that only 30 minutes will be allowed, enter 30 into the Recoverability column and press Shift + Enter and the value will be converted to 62%.

The recoverability percentage applies not only to timed attendances but also to lump sums as well as disbursements, and the Shift + Enter shortcut applies equally to these.

Specifying recoverability for an item does not cause it to be included or excluded from an exported document - the figures are intended to be used as an indication of your likely recovery on assessment and should be useful when negotiating. They also apply to inter partes costs only (legally aided items will show the Legal Aid icon in their place).

The tags can also be applied by shortcut:

Ctrl + Shift + 1 = Red
Ctrl + Shift + 5 = Yellow
Ctrl + Shift + 9 = Green

Please note these shortcuts use the numbers on the main keyboard rather than the number pad.

Control Centre

The Control Centre has an improved option allowing you to display percentage recoverability: popping up the menu you will see that a new percentage option has been added which works as follows:
- **green, yellow, red**: all costs other than solicitor client are shown
- **green, yellow**: No costs tagged red (with a recoverability value of 0) or solicitor client costs are included
- **green**: only costs tagged green (with a recoverability value of 100) are shown
- **percentage**: all costs other than solicitor client are shown but are subject to the recoverability percentage value giving you a better indication of the likely recovery on a file if you have completed the recoverability column with exact percentages.

Auto-Insert Text

Shift + Enter

There are two features that will automatically insert text into the description column of attendances and disbursements:

Document tags

CostsMaster allows you to quickly insert a "tag" number into a description. This is typically used if you are flagging the physical documents with a paper tag and wish to include a reference to that flag in the item description. CostsMaster automatically keeps track of the next available tag and will insert it when you use the Shift + Enter shortcut in the description column of an attendance or disbursement.

By default CostsMaster defaults to tagging documents in lower case Roman numerals and inserting the tag within parentheses, but both of these settings can be altered in the Local Settings window.

The tag is inserted at the current cursor position. Please note that if any text is selected it will be replaced by this operation.

Mileage Claims

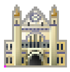
For disbursements only, CostsMaster can insert a claim for mileage simply by entering the amount of miles travelled and using the Shift + Enter key in the description column. A full description is inserted together with the amount and VAT.

If the cell has just the figures for the miles travelled CostsMaster can calculate the appropriate amount just by using the shortcut. However if there is other text in the cell it is necessary to select the figures for miles travelled before using the shortcut.

The mileage rate is defined in the Local Settings Window together with the text that is inserted with it.

Recording Work in Different Locations

Procedural Steps



Alt + S

Procedural Steps represent items such as Court attendances, conferences with Counsel, pleadings etc which are traditionally shown in a bill of costs in chronological order at the beginning. However, in High Costs Case Plans, procedural steps are used to record all future work. Please see the section on Recording future work in a case plan for further information.

The following information can be entered for each procedural step:

Date

The date of the procedural step. Attendances within a step also have their own date although this column is hidden by default. CostsMaster automatically ensures that new attendances are given the same date as the step to which they belong, but you can alter the date to include work in a procedural step that is done on a different date.

When you change the date of a procedural step CostsMaster may or may not change the date of any attendances within that step depending on the setting for this in Local Settings > Dates. The options allow you to specify that CostsMaster should

- Never change dates (you can still do so manually if you wish)
- Ask whether you want to change the dates (including whether to change dates of all attendances or only those that had the same date as the procedural step)
- Automatically change dates if they were the same as the procedural step and ask about any others
- Automatically change dates if they were the same as the procedural step and ignore any others
- Automatically change all dates.

See Entering Dates for more information on recording dates in CostsMaster.

Type

Here you can select the type of attendance from the following options:

- No Attendance
- Hearing (Solicitor Advocate)
- Hearing (Counsel Advocate)
- Conference Without Counsel
- Conference With Counsel
- Advocates Meeting
- Other Attendance

For case plans that require a list of hearing dates, these are compiled automatically from any procedural steps where the type is set to Hearing without Counsel or Hearing with Counsel.

Where the local option to show procedural steps in colour is selected the procedural steps display in different colours depending on the type of step. This makes it easier to see what steps you have at a glance if you have the type column hidden. The colours used are

- No Attendance	Black
- Hearing (Solicitor Advocate)	Green
- Hearing (Counsel Advocate)	Purple
- Conference Without Counsel	Olive
- Conference With Counsel	Maroon
- Advocates Meeting	Blue
- Other Attendance	Turquoise

Description

The description of the step, such as "Attending upon hearing"

Phase & Task

This allows you to specify the phase of a step. Any summarily assessed costs within the step will use this setting when exported to a costs budget. In addition it will function as a type of preset in that any attendances and disbursements created within the step will automatically assume this phase. Whilst not necessary, the phase and task can be set for the procedural step as a whole if you want to produce a costs budget or other documentation involving the J-Codes. Please see the section on Phases, Tasks and Activities for further information on this.

Setting the phase for the step is useful if

- you wish to limit the number of tasks shown
- you are exporting a budget where the attendances within the step form part of a contingent phase

Setting the task for the step is

- useful if all attendances with the step will have the same task (as would be the case for a particular type of hearing)
- essential if you are claiming summarily assessed costs that you wish to be included in the costs budget.

Even if you set the phase and task for a step it doesn't preclude you from altering them for individual attendances should it be necessary.

If you alter the phase or task after recording attendances or disbursements within the step, the phase and task of those attendances and disbursements may be changed automatically, or you may be asked whether you wish to alter these values, depending on the setting for this in Local Settings > Phase/Task/Activity Options.

Brief Description

This optional field allows you to define a brief description to be used in places where the full detail of long hearings is not usually required. If no brief description is used, the main description is used instead

Excluded

If a procedural step is excluded none of its attendances or disbursements will be exported in the finished bill.

Draw Attention

This property can be used to highlight items that require your attention in some manner.

Attendances

Time spent in relation to the procedural step is recorded in a standard attendance window which is accessed either from the Procedural step grid attendances column or from the edit procedural step window. Please see the section on Attendances for more information. If the procedural step has costs that have been summarily assessed or costs recorded under the Family Advocacy Scheme these attendances may be greyed out indicating that they will not appear in exported documents.

Disbursements

Disbursements expended in relation to the procedural step are recorded in a standard disbursement window which is accessed either from the Procedural step grid attendances column or from the edit procedural step window. Please see the section on disbursements for more information. If the procedural step has costs that have been summarily assessed these disbursements may be greyed out indicating that they will not appear in exported documents.

Summarily Assessed Costs

This field is used to record details of costs which have already been summarily assessed. Clicking the button will open the Summarily Assessed Costs window.

FAS

This field is used to record work that falls under the Family Advocacy Scheme. The text may be greyed out if FAS does not apply due to the Aspect that has been defined for the current part. Clicking the button will open the Edit FAS window. If summarily assessed costs have been recorded the FAS column will be disabled and anything already defined will not export.

Events

This field is used to record events information for LAA Events Case Plans. Clicking the button will open the Edit Events window.

In addition, if Counsel has opted to claim his fees under the FGF or FAS schemes, you can select the Counsel FGF/FAS property for the step and record Counsel's total fees as a disbursement. When preparing a CCFS case plan, not selecting this property will cause such fees to be treated as "Counsel Disbursements"; on older case plan formats they will simply be ignored.

The total value of the events in a step will be included in the control centre totals in preference to any other costs recorded within the step.

Pre Agreed

This property is used to indicate that the events claimed in this step have already been agreed by the LAA.

Summarily Assessed Costs

Right Ctrl + Right Shift + S

This window is invoked from the Procedural Steps Grid or the Edit Procedural Steps window and is used to record work which has already been summarily assessed.

Work recorded in this window is not claimed but is shown in an exported bill and can be included in the success fee calculation.

Costs Summarily Assessed at

Ticking this box enables the summarily assessed costs and causes attendances and disbursements for this procedural step to be disabled. It will also enable the other boxes to allow you to record the costs details.

Profit Costs

Here you can enter amounts awarded for profit costs and VAT thereon.

Fee Earner

The fee earner that the costs will be assigned to for the purposes of the costs budget.

Disbursements

Here you can enter amounts awarded in respect of disbursements and any VAT thereon.

Counsel

Here you can specify a Counsel and after so doing can record any amounts awarded in respect of Counsel fees and VAT thereon. If the Counsel you have specified has a success fee defined the amount recorded here will be taken into account in calculating his success fee.

Edit FAS Window

Right Ctrl + Right Shift + F

This window is invoked from the Procedural Steps Grid or the Edit Procedural Steps window and is used to record work under the Family Advocacy Scheme.

Changing values in this window will cause the FAS claim to be calculated using the currently defined presets. There are multiple presets available for FAS and you will first need to specify the one relevant to your case in the Legal Aid Claim Settings window.

Enable FAS

Enabling FAS for a procedural step will cause the FAS settings to become active. They will override any attendances recorded in the step in CLAIM1As and fixed fee bills.

Fee Earner Initials

If you are preparing a CCMS claim this is how you identify the Fee Earner for this item.

Court Level

Depending upon the date of the containing Procedural Step, this will be the Court in which the matter was heard or the level of the presiding Judge. If the Procedural Step is dated before 22nd April 2014, it will be the Court; from that date onward it will be the Judge.

If you are editing multiple Procedural Steps, some with dates before 22nd April 2014 and some after, it will be the Court unless you chose "Family Court" in Case Details in which case it will be the Judge.

Hearing Type

The options available will differ depending on the Aspect set for the part.

Hearing time for FAS purposes

This is the amount of time spent at the hearing in accordance with the FAS rules.

Units

This is calculated automatically when the hearing time for FAS purposes changes, but you can override this should you need to.

Fixed Fee Rate

This is calculated from the Court Level, Hearing Type and Aspect for the part. Preset fixed fees are supplied with the program but can be altered in the Presets window should the values change at some point in the future.

Claim

This is the value of the claim calculated from the units and fixed fee rate. Changing either of these values will cause the claim to recalculate. You can also override the claimed value should you need to do so.

Settlement Fee

For parts where the Aspect is set to Finance, this allows you to include a claim for a settlement fee.

Bolt-Ons

In addition to the main fee you can quickly claim any applicable bolt-ons by ticking the relevant boxes. For bundles you can specify the bundle size and for travel you can specify the distance and reasons.

Edit Events Window

This window is invoked from the Procedural Steps Grid or the Edit Procedural Steps window and is used to record work to be claimed in an Events Case Plan.

It is possible to record separate information for the solicitor, junior counsel and leading counsel, although the latter will not be used unless you export a two counsel case plan. If you have recorded additional rates for either of these, you can choose which apply by altering the drop down box in the first column.

For each you can specify the fee earner concerned. If specified their initials are used to mark the column in the case plan. If they are omitted an 'X' is used instead.

Event Type

For each item you can choose the type of event from the following:
- Interim/Direction/Review Hearing
- Issues Resolution Hearing
- Case Management Conference
- Advocates' Meeting
- Finding-of-Fact Hearing
- Pre-Hearing Review
- Final Hearing
- Conference

- Over-run Payment
- Under-run Payment

Solicitor Attendance

Depending upon the Case Plan type you have selected, different options are available. If you have selected one of the types where advocacy is performed by Counsel, the following apply:
- None
- Event
- No Attendance

If the case plan has been set to one of the Solicitor Advocate types then you will have the following options for the solicitor:
- None
- Advocacy
- With Counsel
- No Attendance

In both cases, the "No Attendance" entry is used to specify that the solicitor did not attend the hearing but needs to claim the preparation fee for that hearing.

If you select one of the types specific to Solicitor Advocate case plans, and then alter the case plan type to one where these types do not apply, you do not need to manually alter each one as they will automatically export to the equivalent non-solicitor advocate type.

Counsel Attendance

Regardless of which Case Plan type you have selected, the options available are:
- None
- Event

Counsel Travel

In addition you can add a claim for Counsel travel costs. These are only supported by the more recent case plans.

Party Work

Alt + P

The Party Work window shows a summary of all work recorded against the parties. This work can be attendances, disbursements or standard items that are claimed in bills by number rather than time.

The information displayed in this window is only a summary of that recorded elsewhere and cannot be edited directly. For each of the fields, clicking on the button in the grid or double clicking the cell will cause a window to be opened in which the individual data can be edited. For the attendance and disbursement fields this will open an attendance or disbursement window but for the standard fields the party details window will be opened.

The following fields are available:

Personal Attendances
Right Shift + Right Ctrl + A

Time spent in personal attendance with a party.

Telephone Calls
Right Shift + Right Ctrl + T

Time spent in telephone calls with a party.

Letters Out
Right Shift + Right Ctrl + L

Time spent on letters out to a party.

Emails
Right Shift + Right Ctrl + E

Time spent on emails to a party.

Letters In
Right Shift + Right Ctrl + I

Time spent on letters in from a party.

Preparation
Right Shift + Right Ctrl + P

Time spent on preparation in connection with a party.

Misc Attendances
Right Shift + Right Ctrl + M

Time spent in other attendances with a party.

Disbursements
Right Shift + Right Ctrl + D

Disbursements expended in relation to the party.

The following items are "standard items" and are actually stored within their own lists, accessible from the party details window:

Telephone Calls

The number of standard telephone calls made and received with a party.

Letters Out

The number of standard letters written to a party.

Emails Out

The number of standard emails written to a party.

COP Routine Letters

The number of standard routine letters written to a party in a Court of Protection bill.

Letters In

The number of standard letters received from a party.

Party Details

The party details window is used to record standard communications for a party. These are simple one unit items for which it is not necessary to record a date or description. The window also gives access to the other locations for the party where long telephone calls and long letters etc. can be recorded.

This window is displayed if you utilise a party shortcut or click the button in a standard item column in the party work window.

Standard Communications

The party details window allows you to quickly record standard items for a party. These items can be recorded in various ways:

- by using the shortcut keys (see below)
- by right clicking in the cell
- by using the up/down arrows of the spin edit control.

For the first two methods holding the shift key whilst performing the action causes the number of items to be reduced.

Fee Earner

This is a read only field which indicates which fee earner the routine items are recorded for.

TC	Shortcut = T	Telephone Calls
LO	Shortcut = L	Letters Out
EO	Shortcut = E	Emails Out
rLO	Shortcut = R	COP Routine Letters
LI	Shortcut = I	Letters In

Phase, Task & Activity

The controls visible for phase task and activity will vary depending on whether you are showing Budget phases or New Bill phases/J-Codes.

Budget Phases
When Budget Phases are being shown you can specify the phase directly and no controls are visible for task and activity. If no phase has been specified directly the phase box is initialised with any default phase set for the party in the Parties window, any default phase set for the Part or any default phase set in the Control centre, in that order. If you set a phase it is remembered for the party in the current part until one of the defaults above it is altered, whereupon the initialisation process kicks in again.

New Bill Phases / J-Codes
When New Bill Phases or J-Codes are being shown, the window works slightly differently:

- The phase box now acts as a filter, limiting the items shown in the task drop down to those that match the phase. The phase box works in the same way as it does in Budget Phases mode.
- The task can be set directly. The drop down items are filtered by any phase specified. When a task is set it will be remembered for the current party in the current part but will only show if it is compatible with the Phase displayed above. If the phase above changes, either directly or as a result of changing a default elsewhere, the task will show as "Unassigned".
- A default activity can be specified for the Party. As activities are generally party-specific it is best to specify them at the party level and they will then be automatically applied when adding work. If you click the Activity name it will take you to the Edit Party window where the default Activity can be altered.

Phases, tasks and activities can easily be applied to standard communications. Please see the following section for further details.

Personal Attendances
Right Shift + Right Ctrl + A

Time spent in personal attendance with a party.

Telephone Calls
Right Shift + Right Ctrl + T

Time spent in telephone calls with a party.

Letters Out
Right Shift + Right Ctrl + L

Time spent on letters out to a party.

Emails
Right Shift + Right Ctrl + E

Time spent on emails to a party.

Letters In
Right Shift + Right Ctrl + I

Time spent on letters in from a party.

COP Routine Letters
Right Shift + Right Ctrl + O

Time spent on routine letters out to a party in a Court of Protection bill.

Preparation
Right Shift + Right Ctrl + P

Time spent on preparation in connection with a party.

Misc Attendances
Right Shift + Right Ctrl + M

Time spent in other attendances with a party.

Disbursements
Right Shift + Right Ctrl + D

Disbursements expended in relation to the party.

Standard Communications - Phase, Task & Activity

Phase, Task & Activity for Standard Communications

Recording standard communications in CostsMaster has always been quick and easy. The introduction of phases for costs budgets and then tasks and activities for electronic bills would, on the face of it, would appear to preclude the use of standard communications, but CostsMaster has a way to still make this possible - all you need to ensure is that the phase or task and activity are set first and CostsMaster will keep the values separate for you.

The first thing to bear in mind is that the phase, task and activity controls appear differently depending on whether you have set the control centre to show Budget phases or New Bill Phases/J-Codes. This difference is explained in the previous section on the Party Details window, but in brief when showing Budget Phases only the Phase can be set and when showing New Bill Phases or J-Codes the Task can be set and the Phase acts as a filter.

In order to record a routine item at a particular phase or task it is necessary to specify the phase or task using the box on this window before recording the routine item. You can do this by selecting from the drop down box or by using the shortcut Ctrl + < or > to cycle through the available values. The Activity never needs to be set here because they are generally party specific and are therefore set for the party as a whole.

You can use any of the standard methods to add or delete an item. When you add an item in this way, CostsMaster automatically stores the information as an attendance set to the appropriate rate type and phase/task within the appropriate party work list. By doing this it is possible to quickly record routine items yet have them separated by fee earner and phase or task/activity for use in costs budgets, electronic bills and other documents. These attendances can be modified manually but there are some restrictions, for example it is not possible to record lump sums or embedded disbursements.

When budget phases are being shown, if the phase is specified when you delete a routine item then CostsMaster will remove one routine item from any underlying attendance with the same phase. If there is no such phase you will not be able to delete the routine. If no phase is specified when deleting then one routine item will be removed from the first attendance.

When New Bill Phases or J-Codes are being shown, if you attempt to record a standard communication for an inter partes fee earner when the task and activity have not been set you will be warned and given the choice of whether to continue.
If you attempt to delete a standard communication without specifying both task and activity you will be warned that this may result in the wrong item being deleted but you are given the opportunity to continue. In this case an item will be deleted from the first found item, which might not be what you intend.

You can choose not to display these messages again during the current session.

How CostsMaster stores Standard Communications with Tasks and Activities

This section gives background information on how work is actually stored when you record a routine communication. You don't need to know this, but having an understanding of what is going on can allow you to do some things more quickly and is invaluable if you find you have to backtrack and change work you have already entered.

In addition to the buttons giving access to long telephone calls etc. are a new set of buttons labelled "Standard telephone calls" etc. If you open one of these you will see a list of attendances just like any other, except there is no date for the items and they include a standard description. If you look closely you will see that there is an attendance for each combination of fee earner/ task/activity that you have recorded with the total number of items recorded for each combination stored as the item number. If you were to leave this window open and go back to the party details window add further standard communications of the same type, you will see the numbers increase. If you change the task to one not previously selected and add more items a new attendance will be created. If you reduce the number of items it will decrease until, when it is zero, the attendance is deleted.

Whilst CostsMaster manages this for you in the background we have made it such that you can go in directly and alter the values should you wish to. If you want to add a block of 50 telephone calls for a fee earner for the same task and activity you can simply add a new attendance, set the fee earner, task and activity and record 50 in the Time/No box. The party details window will update to reflect this (provided you haven't added a date).

More usefully, when deleting items you can use the list to see exactly what you are deleting, which you may find easier than using the traditional methods mentioned above.

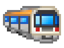
You can also access the various attendance windows for each party by clicking on the relevant button or by using the shortcuts described below. Adding attendances to these lists will use any task defined in this window as a default value.

Documents

 Alt + D

This window is used to record preparation work that appears in the Documents section in a traditional bill. Documents are considered as attendances in CostsMaster and full details can be found in the section on attendances.

Travelling & Waiting

 Alt + W

This window is used to record travelling & waiting attendances that are not recorded elsewhere. Related disbursements can be embedded within the travelling & waiting items as is the case for all attendances. Please see the attendances section for further details.

Miscellaneous Disbursements

 Alt + J

This window is used to record disbursements that have not been recorded elsewhere. Please see the section on disbursements for further details.

Costs of Assessment

 Alt + C

The Costs of Assessment Window allows you to claim costs relating to preparation and assessment of the bill of costs.

Costs Draftsman's Fee As A Percentage

Enabling this feature will allow you to claim a fee for preparing the bill of costs based on a percentage of the profit costs claimed. You can specify the percentage and whether the fee is claimed inter partes, legal aid or both.

It is also possible to specify the range of parts that the fee is calculated on using the "Calculate Fee on costs from" drop down box. This box allows you to select "This part only" or to choose from any of the parts that precede the current part. Please note that altering the number of order of parts will impact on this setting as follows:

- Adding a part within the range will include the new part in the range, but adding a part before the range will adjust the range automatically.
- Deleting a part before the range will adjust the range automatically.
- Moving a part will adjust the range automatically, but if the part in which the Costs Draftsman's fee is defined is moved before the range it will be set to "this part only".

There are three ways the costs draftsman's fee can be claimed

- As a disbursement
- As a lump sum profit cost
- As a pseudo-hourly rate profit cost.

This last option calculates the fee at a percentage and then works out how many hours this represents at the rate specified (rounded down to the nearest minute). The time and rate is then claimed as if it were an ordinary attendance.

As you may be aware it is possible on export to specify the order in which the parts export and even to merge parts together. The range of parts you have specified for the costs draftsman's fees may no longer be relevant on export, therefore CostsMaster uses the following rule to determine the amount on which the costs draftsman's fee will be calculated:

```
The figure on which the costs draftsman's fee is calculated is the
total costs of all exported parts that include work drawn from a
CostsMaster part included in the range of parts for the costs
draftsman's fee.
```

This ensures that the costs of all specified CostsMaster parts are included in the fee but it doesn't (and cannot) prevent the costs of other parts which are merged with these parts on export also being included. It is the Draftsman's responsibility to ensure this does not happen.

In the Bill Settings and Breakdown Settings windows there is an option to claim a success fee on Costs of Assessment. Please note that if such an option is selected the success fee will **not** be calculated on the Costs Draftsman's fee even if it is claimed as a lump sum profit cost or as a pseudo hourly rate profit cost, because the Costs Draftsman's fee is always calculated last. If you wish to claim a success fee on the costs of bill preparation you should not use the costs draftsman's fees as a percentage feature but should instead create a fee earner for the the person preparing the bill and record their time in the costs of assessment attendances window.

Make provision for attending assessment

This box will add a line to a traditional bill of costs claiming costs of attending assessment. The figures for this are left blank as the intention is that they will be inserted on assessment.

Claim Schedule Costs At Prescribed Rates.

In Legal Aid & Inter Partes bills CostsMaster will claim any inter partes costs defined on this window in the Legal Aid schedule at inter partes rates. If this box is ticked the costs will be re calculated at prescribed rates for the schedule as for other costs.

Claim Case Plan Costs as a separate stage

For High Costs Case Plans you can opt to show all the costs of assessment in a separate part in the exported case plan. Please note that if you are also claiming a costs draftsman's fee at a percentage it will be calculated on the total figure shown in those parts and will not include any costs of preparation which will now be shown in a separate part. If claiming a costs draftsman's fee in these circumstances it is recommended that you do not select the option to show the costs of assessment in a separate part.

Attendances

Clicking this button opens an attendance window where you can claim for such items as checking and signing the bill of costs

Disbursements

Clicking this button opens a disbursement window where you can claim any related disbursements. Please note that if you need to claim disbursements for a CCMS case as costs of assessment, such as when you need to claim BSL interpreters' fees so that they are not included in the statutory charge, you can record them here and leave the "Disb Type" blank. They will then get the "Court Assess Cost LA" activity which will ensure they are not counted towards the statutory charge.

Part Attendances

Alt + L

In this window you can view all attendances within a part. In addition to all the usual attendances columns there is an extra (read only) column labelled "location" that indicates where the attendance has come from.

You can alter most fields of an attendance in this grid but cut/copy paste are not currently available.

Part Disbursements

 Alt + K

In this window you can view all disbursements within a part. In addition to all the usual disbursement columns there is an extra (read only) column labelled "location" that indicates where the disbursement has come from.

You can alter most fields of a disbursement in this grid but cut/copy paste are not currently available.

Pending Work

Although the pending work window is usually used when importing work from an external system, attendances and disbursements can also be recorded directly here should you wish. You may want to do this if you are recording work where you are uncertain whether it will be claimed or you are uncertain as to its location. Any work recorded in the pending work window will not be exported until it is moved to a different location in CostsMaster.

Chapter 6

Types of Bill

Columned Bills

Introduction

Recording work for columned bills is very straight forward as the structure of windows in CostsMaster follows the format of the traditional exported bill. Work recorded, say, in the procedural steps window will appear in the procedural steps section in the bill etc. Each of the available windows are detailed earlier in this guide.

When it comes to export you can use the Bill Settings window to customise the format of the bill.

Column bills can only be exported to RTF and PDF.

Bill Settings

 Ctrl + Alt + J

This window is accessed from the Case Details window or by clicking the Case Details button on the main toolbar and selecting the Bill Settings item from the drop down list that appears.

It allows you to record information specific to exported bills for assessment by the Court. Whilst this window deals with the appearance of the exported bill, its settings are saved with the file and can therefore vary on a file by file basis. This means that if you have to send a file to a colleague, it will export as you intended rather than based on the local settings of your colleague's machine.

The downside is that there are a lot of options on this window that you might find yourself re-setting whenever you start a new file. There are two solutions to this:
- When you start a new file and set the options in this window the way you want, you should consider saving the file as a program template so that you can start your next file from this point without having to enter the options again.
- The program will also remember the last selections made in this window and when starting a new blank file will restore these options for you, saving you the need to make the same changes repeatedly.

General

This section contains a variety of options, some of which were previously located in the Export Options window.

Mark Blank Disbursements with an "X"

When selected any blank disbursements in a bill will be marked with an X to draw attention to their absence. in addition any totals that should include the disbursement are similarly marked.

Below this is a further option that is enabled only when this is ticked. It allows you to produce a separate summary with the totals to date which you can use should you wish to pencil in the current figures.

Move blank dates on export

When sorting dates on export CostsMaster will try and keep items with blank dates next to the item that precedes them within the program. Occasionally this is not possible and in this case this option determines if they appear before all other items or after all other items.

Pad pound signs in exported bills

When this option is ticked the item amounts in the exported bill will have their pound signs spaced so that they align with the pound sign on the longest item.

Show Lodgment Fee

When this option is selected, any lodgment fee defined on the Case Details window will be included after the bill summary in an columned bill.

Include A Work Done Section

This setting allows you to specify whether the bill is exported with the work against the parties, documents and miscellaneous travelling & waiting wrapped within a "Work Done" section with its own total at the end or whether each section is claimed separately.

Start Numbering At

The box allows you to specify the first item number used in an electronic bill. This defaults to 1 but you can alter it if, for example, you are producing a follow on bill for a second firm of solicitors and you want the numbering to carry on from the first.

Backsheet Certificates

This box allows you to select one of the groups of certificates that you want to appear on the back of the bill. Certificates and groups can be added and edited in the Certificates window which you can get to by clicking the "Edit Certificates" button.

Phase Bills

Show Chronology

When this option is ticked the Procedural Steps narratives are shown together at the top of the Bill. If a brief description has been entered, this will be used later in the Bill instead of repeating the full description: this is especially helpful if a lengthy Order has been included.

Show Phases as Sub-Parts (with summaries)

When this option is selected each phase will appear in the exported bill as a "sub-part" complete with a total at the end.

Group Work By Phase

This setting is similar to the setting in the Control Centre that determines which types of phases (and tasks, activities and expenses) are displayed in the program, except that this setting determines which are used in the exported phase bill.

Show Budget Amount in Phase Summary

When this option is ticked the Phase Summary at the end of the Bill will include an extra column comparing the Budget amount with the Pre-Budget and Post-Budget amounts. This option is only available when the work is set to be grouped by Budget Phases.

Lines & Headers

Column Lines

This setting allows you to specify whether column lines are shown (for use when printing on plain paper) or turned off (when printing on your own paper with pre-printed lines). There are three options, None (which creates a document devoid of lines for printing onto pre-lined paper), Basic (which gives single lines but works with all word processors) and Advanced (which gives very fine double lines but works with Word only). It is also possible to select the line colour that is used.

Separate settings are provided for bills and Legal Aid schedules. By default the Legal Aid schedule uses a different colour to the bill to assist in distinguishing between the two documents.

Header & Footer Composition

There are five elements that can be included in either the header or footer of the document if you so wish. They are

- Page number
- Date of export
- Company Name
- Reference
- Filename

The company name and reference are recorded in the Local Settings window.

The filename is the name you have saved your CostsMaster file as without the full path.

Rates & Narrative

Narrative Position

This setting determines whether the narrative appears in the bill or on the front sheet, with an additional option for it to be justified when on the latter.

Rates Position

This setting determines whether the Rates for the parts are shown at the start of each part, at the start of the bill or on the front sheet. Please note that the latter option is only available when the narrative is also set to show on the front sheet.

Category Description for Rates Utilised

This setting allows you to specify which of the three possible descriptions that can be defined for each category should be used in the Rates Utilised section at the beginning of each part.

Hide rate type where obvious

This option will cause the travelling & waiting rate type to be suppressed whenever the word "travel" or "waiting" appear in the description for an item.

Don't refer to rates if same as part one.

If you have multiple parts and some are set to use rates from part one, with this option selected the "Rates as per part one" text will not be exported. Furthermore, if the rates are set to show at the beginning of the bill or on the front sheet and *all* rates use rates from part one, with this option set you will not get a set of part descriptions at the beginning of the bill and the Rates Utilised section will appear on its own. This gives the same effect as using "Global Rates" in CostsMaster 2.

Group Work By

Here, you can choose whether to group the work in the bill by Category or by fee earner. When enabled, the fee earner name or initials to be used for attendances and summaries for each of the bill sections can be selected from the appropriate page instead of selecting the Category Description. In addition the option to apply a blank line will apply to fee earners instead of categories.

Add Fee Earner Information To Bill

This allows you to optionally add a fee earner information to a bill. This can either take the form of a simple list within the bill or a more comprehensive table of information in an attached schedule, and the latter can be selected only where the number of fee earners exceeds a number which you can specify. When selecting a schedule you will need to select the new Fee Earner Schedule template when exporting.

This information will include the main Category 1 description for each fee earner, but you can optionally specify that either the Category 2 or Category 3 description should be included also. This is useful, for example, where you have additional information about the Grade that you would like to appear. This option is only enabled when the option to add Fee Earner information is set to anything other than "None".

Success Fees

Include Success Fees in Costs Draftsman's Fee calculation

When ticked the amount of any success fee will be included in the total profit on which a costs draftsman's fee is calculated.

Claim Success Fees on Summarily Assessed Costs

When ticked any summarily assessed costs will be included in the amount on which a success fee is calculated.

Claim Success Fees on Costs of Assessment

When ticked any time recorded in the costs of assessment window is included in the amount on which a success fee is calculated. When enabled there is a further option that determines whether the success fee on this item is shown in the success fees section or in the costs of assessment section.

Enhancement

Mark Enhancement

This option allows you to specify whether to mark items that are excluded or not excluded.

Please note that excluded markers will be applied only to work that is subject to enhancement where exclude is set to "Yes" or "Always". The markers will not appear where enhancement is not claimed on work of a particular rate type because to do so could produce a result where the enhancement claim is ambiguous. Such enhancement will specify which rate types it is applied to.

Primary / Secondary Marker

The primary marker is the one that is used most often to mark enhancement. The secondary marker is only used for complex enhancement claims where a single marker is insufficient to unambiguously identify the excluded items.

Category Description for Category Enhancement as a Marker

When the option is set in the Rates & Narrative page (above) to group work by Fee Earners, Category enhancement will appear as a marker (in the same way as fee earner enhancement appears when work is grouped by Category. This option allows you to specify which Category Description is used for this purpose.

Family Fixed Fee Bills

These options apply only when exporting using a family fixed fee bill template and are ignored for all other bill types.

Claim Advocacy Only

When selected core costs will not be exported to the bill.

Show separate subtotals for core costs

When selected separate subtotals are shown for core costs and the enhancement claimed on them.

Claim enhancement on core costs

When selected enhancement will be claimed on core costs.

Show CLAIM1A Care 2007 Fixed Fee after Bill Summary

When selected any Care 2007 Fixed Fee defined in the CLAIM1A Settings window will be shown after the bill summary. It will not be included in any totals.

Show FAS in Columns

When selected any costs claimed under the Family Advocacy Scheme will be included in the columns and carried forward to the part and bill totals. When the option is not selected the costs are shown in the body of the bill only by way of information.

Include FAS in Costs Draftsman's Fee Calculation

When FAS is not shown in columns, selecting this option will include the FAS totals in the Costs Draftsman's fee calculation. When FAS is shown in columns the FAS costs are automatically included in the Costs Draftsman's Fee calculation and this setting has no effect.

Legal Aid Schedules

Show Legal Aid Rates in Legal Aid Schedule

When ticked the legal aid rates are repeated at the beginning of the Schedule of inter partes costs at legal aid rates.

Show Enhancement Justification in Legal Aid Schedule

When ticked the enhancement justification is repeated after the rates in the schedule of inter partes costs at legal aid rates.

Front & Back Sheets

Assessment Details Alignment

This option determines whether the text for assessment details is aligned left, right, centre or justified

Put Assessment Details in tramlines

This option determines whether the assessment details text appears within horizontal lines on the page.

Sections

The remaining items represent each of the available sections in a columned bill. There are five main sections in a bill (procedural steps, party work, documents, travelling & waiting and costs of assessment), plus additional sections for party work where the party is set to export to a location other than the party section. These additional sections will only be shown in the bill settings window when a party has been set to export to that section.

Each section has its own settings that can be set independently of the other section. This gives you huge flexibility in the look of your exported bill.

Please note that some controls may show options that are greyed out due to that option being rendered irrelevant by the setting of another option on this page.

Show Attendances In Schedule

This setting determines when the various attendances in a section are shown in the bill and when they are included in a schedule appended to the bill. You can choose to have them in one or the other or to be included when the number of items exceeds an amount which you can define in the accompanying box.

Short Attendance Descriptions

When items are claimed with amounts the description automatically wraps before the amount column. This option will make descriptions wrap at this point even if no figures are claimed next to them.

Add blank line between categories

When items are grouped together by category, such as in a summary or in the party work section, this option will cause the work for each category to be separated by a blank line.

Category Description for Attendances

This setting allows you to specify which of the three possible descriptions that can be defined for each category should be used when necessary when exporting an attendance.

Item Spacing

This determines whether a items are listed with a blank line between them.

LA/IP Work

This setting applies only to bills where inter partes and legal aid work is claimed within the same section. For these it determines how such work is shown. If numbered, the inter partes and legal aid work will have a separate number.

- **Repeat Summaries** - the inter partes summaries are shown and totalled, followed by the legal aid summaries.
- **Double columns** - the summaries include both inter partes and legal aid work and a single total is shown, but the figures in the columns show the separate inter partes and legal aid values. If numbered, the item has a single number.
- **Double Totals** - the summaries include both inter partes and legal aid work but two totals are shown, one for inter partes and one for legal aid. If numbered, each total has a separate number.

Claim Attendances

This setting allows you to specify whether each item in a section is calculated and its amount shown next to it, or whether its time is carried forward and aggregated and the amount calculated as part of a summary. The setting of this control will cause many other controls to enable or disable them selves or some of their options accordingly.

Claim in Columns

This setting determines whether the section is claimed in the bill columns when it is totalled at the end or whether the individual items or summaries should be claimed in the columns directly and no total shown. The setting of the Claim Attendances control determines whether the items or summaries options are available. The option for Work Done is automatically selected when the "Include a work done section" box is ticked. If this control is set to one of these and the Claim Attendances control is changed, this control will be updated automatically. Please note that for the party, documents and travelling & waiting sections, this control will be disabled if the option to include a Work Done section is ticked.

If you are intending to produce a Schedule of Inter Partes Costs at Prescribed legal aid rates to accompany a bill we would strongly advise you to ensure that no sections are set to claim Summaries in columns. The summaries in the legal aid schedule are recreated based on the legal aid categories and do not have any correlation with the summaries in the bill. If summaries are claimed in columns they will be numbered in the bill but not in the legal aid schedule.

Numbering

As well as specifying where the figures are claimed, you can specify where items are numbered. If Claim in Columns is set to items or summaries this control will be limited to the same option, as all items claimed in columns must be numbered. However, if Claim in Columns is set to Total you can also opt to number individual items or summary items should you wish to do so. The option for Work Done is enabled when "Include a work done section" box is ticked.

Summary Spacing

Similar to Item Spacing (above) this determines whether the lines in the summary have a blank line between them.

Add blank line before summary

When ticked an extra blank line is inserted between the section items and the summary.

Category Description for Summary

This setting allows you to specify which of the three possible descriptions that can be defined for each category should be used when necessary when exporting an summary item.

Show the rate class where it is not the default

Determines whether the rate class for an item is shown where it differs from the default rate class for the type of attendance. For most sections the default rate class is preparation but for procedural steps it could be either advocacy or Counsel (depending on the type of the procedural step) and for items recorded within the travelling & waiting section it is, unsurprisingly, travelling & waiting.

Show Counsel Fees before attendances

For procedural steps only, this determines whether any Counsel fees should be shown before the attendances. Any other disbursements recorded will be shown in the usual way after the attendances.

Category Position

For procedural steps only, these controls determine how the category is shown for both inter partes and legal aid work. The following options are available:

- Before description - the category is shown on a line of its own with a further blank line before the procedural step description.
- At start of description - the category is added to the beginning of the procedural step description.
- At end of description - the category is appended to the procedural step description.
- At start of first item - the category is added to the beginning of the first attendance description.
- At end of first item - the category is appended to the first attendance description.

In addition there is a further option to specify whether the category name should appear in parenthesis.

Show the number of items

For party work only, this allows you to specify when the number of items within a section is shown before that section.

Preview

The preview button will generate a short preview bill of the currently selected section in order to see the effect of changes. The preview will use work recorded in the file so it is necessary to actually have work in the section in order to see the effect. In addition some additional work may also be shown.

Bill Certificates

The Certificates window allows you to create and edit certificates and group them together for inclusion on the back sheet of a bill.

Certificate Groups

These are collections of certificates grouped together for inclusion in a bill. You can choose a certificate group to be exported with your bill in the bill settings window. The buttons above the list allow you to add, insert, edit, move and delete the certificate groups. When you select a certificate group the certificates it contains are shown in the Certificates in Group box.

Certificates in Group

This box lists all the certificates in the currently selected group. These certificates can be reordered or removed from the group.

Available Certificates

This box lists each of the available certificates that have been defined. Certificates can be added to the currently selected group by selecting the certificate and clicking the "<<" button to the left of the list. The buttons at the top of the list allow you to create new certificates, re-order certificates and delete them. Once a certificate has been created the name it is given cannot be changed. The text of a certificate can be altered in the Certificate content window.

Certificate Content

This box shows the text of the certificate itself. Clicking on either the Available Certificates or the Certificates in Group box will cause this box to update to show the text of the certificate you have selected. The certificate text can be altered here.

When you select a certificate from the Certificates in Group box three additional check boxes become available.

Precede with "Or" - when ticked the exported certificate will be preceded with the word "or". This is obviously used where you have included two alternative certificates in a group.

Check Box - when ticked the certificate will appear in the exported bill with a check box next to it.

Post Assessment - when ticked the certificate will appear in a post assessment certificates section in the exported bill. This is traditionally used only in legal aid bills.

Please note that when you select a certificate from the Certificates in Group list and you make changes to that certificate, the text that is altered is the text of the original certificate. It is best to think of the Certificates in Group list as a list of references to the original certificates with the text being obtained at the time the bill is exported. This does mean that should you need to amend the text of any certificate, and groups that use that certificate will automatically utilise the changes when they are next exported.

Costs Budgets

Introduction

CostsMaster allows you to both prepare a Costs Budget and to manage that budget once it is set by the Court or agreed with the other side. The following sections explain these procedures in detail.

All costs budget templates can be exported to RTF and PDF. In addition, all other than the Costs Budget Report and Costs Budget Supporting Documentation can be exported to XLSX.

Preparing Costs Budgets

General information relating to Costs Budgets is entered in the Costs Budget Window. Beyond that it is only necessary to specify the phase that applies to each item of work and to specify which work is incurred and which anticipated.

Phases and Costs Budgets

The Precedent H Costs Budget has the work grouped by phases. These represent periods in the action such as "pre-action costs" or types of work such as "witness statements". As well as the standard phases it is sometimes necessary to create contingent phases for work which may or may not be required depending on the course the case takes.

Before an attendance and disbursement can be included in a budget it must be tagged with a phase. You may also wish to tag items with tasks (and activities) because this will not only enable you to use the work in a bill at the end of the matter, you can also choose to produce supporting documentation that breaks the work down by task and activity. Whilst this might seem like an arduous task CostsMaster provides ways to automatically mark work without you having to do so. Please see the section on Phases, Tasks and Activities for more information.:

Apply Phases Tool

If you have an existing file that you want to mark retrospectively you can use this function on the tools menu to mark all attendances and disbursements or just those whose phase has not been set. It uses keywords which you can define in the Presets Window to match against the description and thus identify a suitable phase.

Apply Phases when Importing work

When importing work from a case management system you can have CostsMaster automatically apply phases using presets in the same manner as the Apply Phases Tool above. The import wizard has a page where the necessary box can be selected and the phases are then applied as the work is imported.

Apply phases whilst recording work

If you are entering work into CostsMaster there are several default phases that, if defined, will automatically set the phase for any item. Default phases can be defined for the bill (in the Control Centre, designed for when all work you are entering at present falls within a phase (e.g. "pre-action costs"), for a part (e.g. where you have decided to record all work for a particular phase within a separate part) and for a party (e.g. a witness could be set to "Witness Statements"). These are applied in reverse order so that any party default takes precedence over any part default and that takes precedence over any bill default.

In the event that no default phase is defined the content of the description is used to match against presets in the same manner as the Apply Phases tool. Because of this the default phase can only be applied when the description has been changed.

Assigning Phases to Routine items

As well as assigning phases to attendances and disbursements you can also apply phases to routine telephone calls, letters and emails etc. Please see the Party Details window for more information.

If you have existing work there are two options depending on whether you need an accurate result or an approximation. If it is the latter then there is a tool that will split routine work between phases or tasks & activities pro-rata with the timed work. To do this you must first ensure that all your timed work has phases or tasks & activities assigned. On the other hand, if you need an accurate result then it will be probably be necessary to revisit the original work in order to assess how the work should be divided between phases.

Anticipated Work and Parts

Costs Budgets also require you to distinguish work that has been incurred with work that you anticipate doing during the life of the case. In CostsMaster you do this by recording anticipated work in a separate part and marking that part with the Anticipated property.

Work in an exported costs budget is automatically grouped by phase and so there is no need to separate work into many separate parts unless you need to do so in order to produce another type of document. Whilst it is not necessary to do so, you are still at liberty to split your work into separate parts should you so wish.

Procedural Steps

Procedural Steps have their own phase field but this is a full phase field, used for any summarily assessed costs within the step, and not a default phase. However once the phase is set for a procedural step any attendances or disbursements will automatically pick up that phase. Should you not want an attendance or disbursement to have the same phase you can simply override this for the attendance or disbursement concerned.

Forms of Budget

The Precedent H budget can be exported in both a word processor format for printing or as an Excel spreadsheet. In addition it is possible to produce supporting documentation to back up the summary figures included in the budget. Finally you can produce a costs budget report which shows details of each phase and how the costs so far recorded compare to those set in the budget.

Managing Costs Budgets

Once a budget has been set by the Court or agreed with the other side it is possible to use CostsMaster to manage the costs on the file and ensure you are on target to meet the budget or to know when it is necessary to seek a revised budget.

The costs budget window gives a detailed analysis of each phase in the columns of the grid together with an analysis of the entire matter in the summary at the top of the page.

Setting the budget

The costs budget window allows you to set a budget for each phase if that is what has been set. If the Court has set a single overall budget you can simply enter the overall budget against any phase. In this case you will not be able to analyse the budget phase by phase but only for the matter as a whole. The budget may have been set in relation to anticipated costs only or in relation to both incurred and anticipated. Whichever way this has been done, you can enter the figure and make the appropriate selection from the box above the grid, and CostsMaster will then monitor progress against the correct figure.

Once a budget has been set for a phase the heading of the Incurred and Anticipated columns changes to "Pre-Budget" and "Budgeted" to better reflect the current situation.

Updating work post-budget

After the budget has been set you can from time to time update the CostsMaster file by importing new work from a time recording system or by entering new work directly into CostsMaster. As well as entering new work you will need to reassess the anticipated work yet to be done. On the one hand this will decrease because work that was previously anticipated has now been incurred, On the other hand the anticipated costs may increase as you realise that there is other work to do that you had not planned for. In this latter case you may decide that you need to apply for a revised budget.

Analysing the costs

The Budgeted column lists the budgeted costs for the action, by phase, and the total figure is shown at the top of the window. Once the budget has been set hovering the mouse over the budgeted value will show the percentage of budgeted costs against the budget for that phase.

In addition this percentage is reflected in the background colour as follows:

	Solid Colours	Gradient Option
0 - 75	Green	Green
76 - 100	Yellow	Green - Yellow
101 - 125	Red	Yellow - Red
126 -	Red	Red

The background colour can either change gradually giving a gradient of colours as it approaches the end of the range or it can change abruptly from one colour to another when the value passes the end of the range. This setting is specified in the local settings window.

Please note the values used to calculate the colours are the rounded percentages so if a budget has been set for £10,000 the anticipated costs will need to exceed £10050 before the percentage value increases to 101% and the colours change.

Client budget

Aside from budgets set by the Court, it is also possible to record any budget agreed with your client and then monitor the costs against that budget. The total costs for the client will also include costs that have not been assigned to a phase or are marked as solicitor/client costs.

You can hover over the Incurred and Total values to get an indication of the percentage as for the Court budget above, and the background will change colour in similar fashion.

Costs Budget Comparisons

The costs budget window allows you to add extra budgets which can be compared against yours. At the bottom of the window you will see a tab labelled "Costs Budget Phases": to the far right of the window are two buttons labelled "+" and "-" which allow you to add a new budget or remove that selected (you cannot remove the main budget).

If you click the "+" button you will be asked for a name for the new budget. You can either create a blank budget and enter the figures by hand or extract the figures from a suitable Excel spreadsheet: if you tick the latter you can open the file in question or type/paste in the path.

You can edit each comparison budget just like the primary budget: you can add or delete Contingent Phases, but you cannot remove standard phases.

You can export a comparison by selecting "Costs Budget Comparison" in the

"Costs Budget" list on the Export Wizard.

Costs Budget Settings

 Ctrl + Alt + V

The Costs Budget Settings window allows you to specify options that affect the look and content of the exported budget.

General

Show All Parties in Title

By default, the title of the costs budget shows only the first claimant and defendant, and if there are other parties they are indicated by "& ors." If this option is selected then all recorded parties to the action will be named in the title of the costs budget.

Contingent Phases per Page

This setting determines the number of contingent phases on each page of the costs budget form. For some Costs Budget templates this figure is fixed and altering this value will have no effect.

Single Page Budget

This option allows you to produce a simplified budget comprising just the front page and without any detailed breakdown.

Include Budget Discussions

This option determines if a budget discussion form (Precedent R) is produced along with your Costs Budget.

Show Rate Column in Addendum

When disbursements are shown in the addendum in the budget, this option will allow you to also show any rate recorded for those disbursements.

Show Assumptions in Addendum

This setting allows you to control whether the Assumptions recorded in the Costs Budget window will be added to the Addendum. The options are:

- Never
- Always
- When any one has more characters than the threshold
- When all combined have more characters than the threshold

The *Assumptions In Addendum Threshold* is entered into the box above these options.

Show Counsel Subtotal

If selected an additional row will be inserted after the list of Counsel showing a sub-total for all Counsel.

Group Counsel Fees by

This setting allows you to adjust how Counsel Fees are shown. The options are

- Name / Rate - each Counsel is shown by name along with their hourly rate.
- Leader or Junior / Rate - Counsel are grouped together according to whether they are marked as Leading Counsel or not, and within that by their hourly rate.
- Leader or Junior - Counsel are grouped together according to whether they are marked as Leading Counsel or not, regardless of hourly rate.
- All - Counsel are all grouped together on a single line labelled "All Counsel".

Show Expert Subtotal

If selected an additional row will be inserted after the list of Experts showing a sub-total for all Experts.

Show Summary of Experts in Addendum

If ticked, this option will add a schedule of experts fees, grouped by type of expert, in the addendum.

Group Expert Fees by

This setting allows you to adjust how Expert Fees are shown. It applies only to the original style of Precedent H as this is fixed in the later versions. The options are

- Payee / Rate - each Expert is shown by name along with their hourly rate.
- Rate - Experts are grouped together by their hourly rate.
- All - Experts are all grouped together on a single line labelled "All Experts".

Shading

This setting determines the colours used in the exported document. The options are

- Colour - the document is exported with different colours for solicitor, counsel, experts and disbursements. In addition different shades are used to distinguish totals from other values making the form easier to read.
- Grey - the document does not distinguish between solicitor, counsel, expert and disbursements but does use different shading to distinguish totals and headers from other figures.

- None - the document is exported with no colour or shading.

Header & Footer

There are five elements that can be included in either the header or footer of the document if you so wish. They are

- Page number
- Date of export
- Company Name
- Reference
- Filename

The company name and reference are recorded in the Local Settings window. The file name is the name you have saved your CostsMaster file as without the full path.

Spreadsheet

Hide Zero Values

If selected cells with zero values appear blank instead of showing a zero.

Colour Editable Cells

The setting applies to the original style of Precedent H and shows the editable cells in yellow.

Freeze/Repeat Breakdown Columns

These two options govern how the row headings for each phase are shown in the spreadsheet. You can select none or either one of these options - selecting one will disable the other. The combinations are:

- **Freeze Breakdown Columns** - the row headings on the Breakdown tab are shown once at the start of the row and remain fixed in place when you scroll sideways. This makes it easy to see which row a particular piece of data refers to whilst not taking up too much space. It is ideal if you intend to view the spreadsheet on screen.
- **Repeat Breakdown Columns** - the row headings on the Breakdown tab are replicated on each page. This is ideal if you intend printing the spreadsheet.
- **None** - the row headings are shown once at the start of the row but will pass out of view as you scroll to the right. This maximises the amount of data that you can see on a screen but it may not be easy to remember the purpose of each row.

Font Size

This allows you to adjust the font size used in the spreadsheet. Please note that the column widths in the spreadsheet are fixed and won't increase proportionately as you increase this value. Large changes may therefore make the spreadsheet difficult to read.

Worksheet View

The Worksheet View box allows you to specify the default view applied to each worksheet page. The default is "Normal" but you can also specify Page View and Page Break Preview which format the page to reflect how it will appear when printed. This applies only to pages where the columns are designed to be printed and it only applies if the above options to Freeze or Repeat columns are not selected.

Phases

For each phase (including any contingent phases you have created) you can specify options relating to the supporting documentation. You can make changes to one phase and have them apply to all phases by holding down the shift key when making the selection. To make them apply only to subsequent phases hold down the ctrl key.

Include in Supporting Documentation

When selected the costs assigned to this phase will be included. Ticking this box enables the other controls on this page.

Incurred Costs / Anticipated Costs

Tick the incurred costs box to include details of incurred costs in the supporting documentation and likewise for the anticipated costs.

Group By

The work in the supporting documentation can be grouped within each phase in a number of ways:

- Tasks and (optionally) additionally by activities
- Locations and (optionally) by parties.
-

Locations are the sections within CostsMaster within which the work is recorded, similar to the Breakdown of Costs.

Show Amounts

When selected the total amount will be included in the supporting documentation as well as the time spent.

Show Individual Attendances

When selected the individual attendances are included in the supporting documentation rather than just a summary of the total time spent.

Disbursements

There are similar boxes to the above for disbursements, giving you the option to include them, group them by task and optionally expense, show individual disbursements and suppress expenses.

Costs Budget Comparison

The Costs Budget Comparison template allows you to produce a document comparing two or more budgets on a phase by phase basis.

Before you can produce this document you must first add details of your opponent budgets in the Costs Budget window.

Costs Budget Variation

The Costs Budget Variation Template, Precedent T, allows you to make an application to vary an existing costs budget.

The Costs to be included in the variation should be marked with the Variation property in the Parts window.

Costs Budget Discussion (Precedent R)

There are two ways of exporting Precedent R.

If you wish to include Precedent R with your Costs Budget as per the official Precedent H, simply tick the appropriate box in the Costs Budget Settings window. When you export a Precedent H the Precedent R will be included automatically with the budgeted figures from your budget.

If you wish to prepare a Precedent R covering your opponent's budget you must first enter details of their budget into the Costs Budget window where you can also record your points of contention and make any offers. Once you have done this, simply export using the Costs Budget Discussion template and a separate Precedent R page will be created for each opponent budget for which you have entered details.

Please note that your own client's budget will not be included when you export a Budget discussion as a standalone document, and any opponent budgets will not be included when you export a budget discussion as part of a Precedent H.

Electronic Bills

Introduction

CostsMaster includes support for the Precedent S and COP-E electronic bills and will include additional e-bills as they are introduced.

Electronic bills can be created in CostsMaster with very little extra effort on the part of the user. This section explains the structure of an electronic bill and what you need to do in order to produce it.

The electronic bill is produced in Spreadsheet format and whilst a word processor version can be produced (and previewed) this does not contain the full bill detail information (which would be too wide to print) but instead utilises the essential information contained in the "Print Version" part of the spreadsheet.

The electronic bill spreadsheet is divided into a number of work sheets represented by tabs along the bottom of the window in Excel. Each worksheet relates to a different element of the bill. There are two different types of sheet that you need to be concerned with, Data Entry sheets and Summary Sheets. There is a third kind, Reference sheets, which contain information used for the smooth operation of the spreadsheet but you will have no need to interact with these.

Data Entry Sheets

These sheets contain information input by the user. They may also include columns that are calculated automatically. The following section explains the fields on each sheet in the standard Precedent S and where the data is drawn from in CostsMaster. Alternative forms of the Precedent S may have the sheets in a different order.

1. Front Sheet

This is equivalent to the front sheet in column bills. Information is drawn from the Instructing Solicitor and Case Details windows in the same was as presently.

2. Certificates

This sheet contains the certificates that have previously appeared on the back sheet of the bill. They are drawn from CostsMaster in the usual way by specifying the group of certificates in the Electronic Bill Settings window.

3. Synopsis

This is the narrative to the bill and is drawn from the Narrative window in the same was as for column bills.

4. Chronology

This is similar to the section in phase bills. It is drawn from the Procedural Steps created in CostsMaster in the same way.

5. Legal Team - Rates - Csl SF

This is effectively the Rates section from a column bill, although you will note that Counsel is recorded here as well. The information in this sheet is drawn from different locations in CostsMaster as follows:

LTM - This is a unique identifier for each Legal Team member. Any work done by this team member will have this ID in the bill detail sheet. It is usually the initials but can be qualified, for example if one fee earner has different rates they may appear as AB1 and AB2. This information is drawn from the Initials field in the Fee Earners window or from the initial characters of the Description in the Counsel window.

LTM Name - The description of the Fee Earner or Counsel.

LTM Status - For fee earners, the description of the Category.

LTM Grade - The Grade (A-D for solicitors or JC, LC for Counsel). This is currently taken from the Category Description 2 for fee earners and from the Leading Counsel property for Counsel.

Further Relevant Details - Any other pertinent information. This is taken from the Fee Earner field of the same name.

LTM Rate - Taken from the Rates window. If a fee earner/category has multiple rates CostsMaster will automatically create additional team members as necessary.

LTM Rate Effective from - This is populated automatically by CostsMaster based on any start and end dates specified for the part in which this rate is defined.

Counsel SF%. The amount of any success fee claimed by each Counsel. Taken from the Counsel Window. Solicitor's success fees are claimed in the Funding and Parts sheet.

6. Funding & Parts

This worksheet contains details of any split in the work that would, in a column bill, cause the work to be divided into parts. The electronic bill does not physically divide the main work into parts in order to give you an overview of the entire costs, but it still allows you to filter the work to see only those items from a part or parts if you wish. It also takes care of any indemnity principle limitation and allows you to claim work at different VAT rates and attracting different success fees.

Part ID - This is a unique ID for each part. Any work belonging to the part will have the same ID in the Bill Details sheet. This is created automatically by CostsMaster.

Description. The name of the part. Taken from the Description field in the Parts window.

Solicitor's Success Fee - The amount of any success fee claimed in this part. All profit costs assigned to this part will have the success fee automatically calculated. Taken from the Success Fee window. Counsel's success fees are defined in the Legal Team, Rates and Csl SF sheet.

VAT Rate - The Vat rate for this part. All profit costs and Counsel fees assigned to this part will have VAT calculated at this rate. Taken from the Part VAT rate.

Profit Costs Incurred - The total profit costs incurred for this part. This figure is calculated automatically by the spreadsheet.

Indemnity Principle Limit - The amount of any limit on the profit costs in this part. Taken from the part Limitation.

Recoverable % of Incurred profit Costs - Where there is an indemnity principle limit, this figure will display the percentage that is recoverable. This figure is then used to reduce the amount claimed in the Bill Detail sheet. Calculated Automatically by the spreadsheet.

Profit Costs As Claimed - Where there is an indemnity principle limit, this figure will show the profit costs actually claimed. Calculated automatically by the spreadsheet.

7. Summarily Assessed Costs

This sheet allows you to record costs that have been summarily assessed and to claim success fees upon them. In CostsMaster Summarily Assessed Costs are recorded as a Procedural Step.

Part ID - The ID of the part that this hearing falls under. Used to obtain the VAT rate and Success fee. CostsMaster finds this from the Part containing the Procedural Step in which the summarily assessed costs are recorded.

Date - The date of the hearing. Taken from the date of the Procedural Step.

Hearing Description - The description of the Procedural Step.

Counsel - If Counsel attended the hearing then this should be the LTM ID for the Counsel that attended. This is created automatically by CostsMaster from Counsel's description.

Profit Costs Allowed - The amount of any profit costs allowed. Taken from the Procedural Steps Summarily Assessed Costs window.

Counsel Fees Allowed - The amount of any counsel fees allowed. Taken from the Procedural Steps Summarily Assessed Costs window.

Disbursements Allowed - The amount of any disbursements allowed. Taken from the Procedural Steps Summarily Assessed Costs window. This is included for information only and forms no part of any calculation.

The remaining columns automatically calculate the appropriate success fees and VAT thereon.

9. Budget

Although this is really a summary sheet (and as such is dealt with later), this sheet does include the budget amount which CostsMaster takes from the Budget window.

13. Bill Detail.

The Bill Detail sheet contains the main body of work. It can contain attendance, counsel fees and disbursements. Whilst it has many columns, the majority are calculated automatically and are used to feed the summaries.

Item No - A unique number to identify each item. Applied automatically by CostsMaster.

Entry No - A reference that links the entry to a specific time entry. Where a single time entry has been split between multiple entries in the bill (e.g. because the work falls under different phases) the items of work will each have the same Entry No. See also "Entry Alloc %". Taken from the Attendance or Disbursement Entry No field.

Part ID - The ID of the part containing this item of work. Used to obtain the VAT rate and any success fee as well as the indemnity principle limitation if applicable. The Part ID is applied automatically by CostsMaster.

Date - The date of the attendance or disbursement.

Description of Work - A brief description of the attendance or disbursement.

LTM - For attendances and counsel fees, the LTM ID of the team member who carried out this work. Used to obtain rates and Counsel success fees. Applied automatically by CostsMaster.

Time - For attendances, the amount of time spent. Any lump sum figures entered in CostsMaster will have a zero time and the profit costs formula altered to allow the entry of the lump sum amount there instead.

Estimated - An indication of any work that is not supported by a contemporaneous time record. Taken from the Estimated Property.

Counsel's Base Fee - For Counsel fees, the amount of the fee.

Other Disbursements - For disbursements, the amount of the disbursement.

VAT on Other Disbursements - For disbursements the amount of VAT claimed on the disbursement. This cannot be calculated from the Part VAT rate as all or part of the disbursement may not attract VAT.

ATEI Premium - The amount of any ATEI premium. CostsMaster takes this from the Additional Liabilities Disbursements window.

Pre, Post or Non-Budget - Whether this item of work was incurred before or after the budget or not subject to the budget at all. Non-budget work in CostsMaster is work which has been assigned a task which has no equivalent in the Precedent H phases. Budgeted work is work recorded within a part to which the Anticipated property has been applied.

Phase Code - Calculated automatically by CostsMaster from the recorded Task Code.

Task Code - Take from the Task field of the attendance or disbursement.

Activity Code - For attendances, taken from the Activity field.

Expense Code - For Counsel Fees and disbursements, taken from the Expense field of the disbursement.

Precedent H Phase - The budget phase under which this work falls. Used to calculate the comparison of work against the budget. Calculated automatically by CostsMaster from the recorded Task Code.

Entry Alloc % - Where a single time entry has been split between multiple entries in the bill (e.g. because the work falls under different phases) this field shows the percentage split between the items. See also "Entry No".

External Party Name - Where the work done was in connection with an external party, the name of that party. In CostsMaster this is applied to any work recorded in one of the party Work windows.

Communication Method - Where work is in connection with a party, this shows the method of that communication. This is calculated automatically by CostsMaster based on the type of work recorded. e.g. Letters, Telephone Calls etc.

The remaining columns are used to calculate the totals that are used primarily to feed the summaries. It is important that the formulae in these columns are not altered.

Summary Sheets

The summaries generally use a feature of Excel called Pivot Tables to take information from the bill detail sheet and automatically summarise it in a variety of ways. Whilst pivot tables can be complicated, this complexity has already been dealt with in the design of the spreadsheet. The one thing you need to know is that pivot tables do not refresh automatically when you change data within the bill. You need to refresh them manually as follows:

1. Click in any pivot table
2. In the Excel ribbon bar, go to the Pivot Table - Analyze tab
3. Click the small arrow underneath "Refresh"
4. Select "Refresh all".

The summaries have totals at the bottom, plus a grand total at the top. This grand total includes any success fees on summarily assessed costs (the amount of which is displayed below the grand total).

8. Main Summary by Phase

This is the main top level summary of the bill and gives you an overview of the profit costs, counsel fees, disbursements, success fees and VAT

9. Summary Budget v Bill

This is a summary comparing the amounts awarded in the budget with the amounts claimed in the bill *by budget phase*. It does not include any costs claimed in the bill that do not have an equivalent Precedent H phase. For technical reasons this summary is not a pivot table and will update automatically.

10. Summary - Task & Activity

This is similar to the Main summary by phase but represents the next level of detail by breaking the work down by task, activity and expense.

11. Summary by Part

This is a summary of the profit costs, counsel fees, disbursements, success fees and VAT claimed in each part.

12. Summary of Comms

This summary is designed to show the number of letters, emails, telephone calls and meetings for each external party, broken down by task. It is similar to the Parties section in an old-style bill.

14. Bill (Print Version)

This sheet is designed to allow the most important information from the Bill Detail in a form that can be printed landscape on A4 paper. Whilst not a summary in the sense that it shows all the data rather than aggregating it, it is a pivot table and does need to be refreshed after any changes are made to the main bill detail sheet.

Reference Sheets

The three reference sheets contain data that is used to populate other columns and determine sort orders etc. It is therefore important that you do not alter the data in these sheets.

Recording work for an Electronic Bill

The majority of information in the electronic bill is drawn from fields that would need to be populated in order to produce a column bill.

The main addition is the need to specify tasks and activities/expenses. Please see the section on Phases, Tasks & Activities for more information.

Electronic Bill Settings

The Electronic Bill Settings window allows you to specify options that affect the look and content of the exported bill.

General

Shading

This box allows you to select the shading applied to headings in the Alternate Precedent S template. You can chose from Colour, grey or none.

Certificate Group

This box allows you to select one of the groups of certificates that you want to appear on the certificates sheet of the bill. Certificates and groups can be added and edited in the Certificates window which you can get to by clicking the "Edit Certificates" button.

Do Not Export Entry No & Allocation %

When this box is selected any information recorded in your CostsMaster file for Entry No and Allocation percentage are not exported to the final bill. This may be the case if this information was imported from a time recording system but you do not wish to include it in the bill.

Start Numbering At

The box allows you to specify the first item number used in an electronic Bill. This defaults to 1 but you can alter it if, for example, you are producing a follow on bill for a second firm of solicitors and you want the numbering to carry on from the first.

Group Standard Items

When selected, all routine telephone calls or letters for the same combination of Party, Fee Earner & Activity will be grouped together in the E Bill. This is useful where you have a large number of individual items, such as where they have been imported from a time recording system.

Treat Emails as Letters

When selected, any emails recorded will be treated as letters and grouped accordingly. Please note that this option doesn't apply to the COP-E which always treats emails as letters.

Include Chronology

This box allows you to choose whether a chronology is exported in an electronic bill. In the Court of Protection electronic bill, a chronology is only required for certain types of case.

Don't Export Estimated Markers

This box allows you to export work that is marked as estimated within CostsMaster without identifying it as such in the exported document.

Legal Team

Export Fee Earner/Counsel Info

When ticked (the default) information from the Fee Earners or Counsel window is exported to an electronic bill. This is how the electronic bill is designed but it breaks the long standing rule in CostsMaster where Fee Earner info is private to the user and only Category information is exported. If you untick this box then only Category information will appear in the bill.

For Grade Use

This box allows you to specify whether Grade information is recorded in Description 2 or Description 3 of the Category information.

Use Description 3 For Effective Period

If this box is ticked then the effective period in the Legal Team table is populated with the text recorded in Description 3 for each category. If it is unticked, then the information is calculated from any part start and end dates.

Sort Legal Team By

This option allows you to sort the Legal Team entries by Fee Earner Order, Category Order, or Grade.

Disbursements

For Disbursements with both values prefer

CostsMaster will use use either the invoice date or the date paid when adding dates for disbursements. If both values are recorded, then this control lets you specify which is used.

External Party Name options

The External Party Name field is populated in the electronic bill for any work that is recorded as part of an external party. For Counsel and Experts these options allow you to show the Counsel or Expert name as the External Party Name regardless of where the work is recorded. There is a further option that allows these values to take precedence over any party name.

Header & Footer

Header & Footer Composition

There are five elements that can be included in either the header or footer of the RTF document if you so wish. They are

- Page number
- Date of export
- Company Name
- Reference
- Filename

The company name and reference are recorded in the Local Settings window. The filename is the name you have saved your CostsMaster file as without the full path.

Success Fees

Include Success Fees in Costs Draftsman's Fee calculation

When ticked the amount of any success fee will be included in the total profit on which a costs draftsman's fee is calculated.

Don't Claim Success Fee on Costs Draftsman's Fee when claimed as Profit Costs

When ticked no success fee will be claimed on the Costs Draftsman's fee when claimed as profit costs.

Sorting

Sort By

This control gives options for sorting the data in the electronic bill. There are various pre-set options that cover common formats, but it is also possible to select "Custom" and define up to 8 fields for sorting exactly as you'd like.

The first option, "template default", requires some explanation. This means that the document will be sorted in the default way as specified for the particular template. This can differ depending on the template. The Precedent S is sorted by Part, Phase & Date, the Alternative Precedent S by Part, Phase, Party & Date, The COP-E by Part & Date and the COP-E Shortform by Part, Activity & LTM.

One point to bear in mind is that selecting any option other than "template default" will prevent you from previewing or exporting the document in Word or PDF format. Electronic bills are designed to be viewed in Excel, but CostsMaster additionally offers a Word/PDF version with a reduced set of columns. However, in order to fit even this minimum amount of data onto an A4 page, we have to use sub-headings to reduce the number of columns. This in turn requires the data to be sorted in the same order as the sub-headings, and thus sorting the data in a different order means that the layout of the document no longer works. As long as you usually export and preview the Excel versions, then this shouldn't affect you, but if you need CostsMaster to produce a Word or PDF version, then you should stick to the template default. (The alternative is to produce the Excel version and generate a PDF from that).

Disbursement Schedules

It is also possible to export a schedule of the disbursements contained within the exported bill. This is similar to the disbursement report, but differs in that this contains only disbursements that are actually exported, whereas the disbursement report contains all disbursements recorded.

Because of the similarity, this feature uses the Report Settings window to specify whether Counsel Fees, Expert Fees and Other Disbursements are included and, if so, which fields are included. Please note that some of the fields apply only to disbursement reports and some to disbursement schedules. These are indicated in the window. If you select the Item No field, then the disbursements in the schedule will have the same numbering as in the bill. If more than one electronic bill is selected, the numbering will match that of the first exported document.

To export a disbursement schedule, in the Export Wizard, simply tick the "Schedule" box below the Electronic Bill entry and select the Disbursement Schedule from the drop down list.

Breakdowns & Statements of Costs

Introduction

As well as preparing a full bill you can also export your work as a breakdown or as a statement of costs for summary assessment. You can also export a Statement of Fixed Costs in Precedent U.

Options are available that govern the level of detail in the breakdown or statement making it easy to create a breakdown that shows the appropriate amount of detail.

All Breakdown/Statement templates can be exported to RTF and PDF format. In addition, the Precedent U and N260A/B templates can be exported to XLSX.

Breakdowns

A breakdown of costs is a summary of the work recorded that falls short of a full bill.

The breakdown shows the total of work under various sub headings which relate to the location in which the work was recorded in CostsMaster, such as "Documents". In addition, for procedural steps, work will be shown broken down by the type of procedural step so there will be entries for "Hearings without Counsel" and "Conferences with Counsel" etc.

With the options available in the breakdown settings window it is possible to customise the level of detail that appears in the breakdown. With no options selected the information shown is limited to single line entries for each of the sections that have work recorded. However with all options selected the breakdown would then have as much information as a bill with the attendances removed leaving just the summaries. By changing the combination of options you can customise the breakdown to show just as much information as you want.

In addition you can export multiple parts to a breakdown and combine them or keep them separate as you do with a bill. This makes it easy to produce breakdowns for costs at differing VAT rates, although in this case you could still combine the parts together and CostsMaster will attempt to show the work at different VAT rates separately (provided the option to show categories is selected).

N260

The N260 form is the prescribed form for use on Summary Assessment hearings.

The form has various restrictions by virtue of its design which either require additional fields to be set within CostsMaster or minor alterations to the exported format. Success fees cannot be included as there is no facility on the form for showing them. The options for these in the Breakdown Settings window, together with those for breaking down work, are not therefore applicable to the N260.

The N260 shows categories as vertical columns and this therefore places restrictions on how many categories could be shown. Previously this was limited to 18, with numbers to the higher end of that scale becoming increasingly unreadable. Now, the layout is altered depending on the number. The program can fit up to 9 category columns on a landscape page without alteration. Between 10 and 13 the category columns are progressively reduced in size. Beyond 13 columns, the columns are split into two (or more) sections. In addition the layout of the columns generally is better with spare space allocated to the description where possible.

Work in the N260 is broken down between the client, opponent, site inspections and others. Work in these sections should be recorded against a party. There is a new field "N260 Section" available for parties where you can specify in which section that party's work should appear.

To claim work at a hearing it should be claimed within a procedural step which is set to Hearing (Solicitor Advocate) or Hearing (Counsel Advocate).

Any work in the file claimed with a rate type of Travelling & Waiting will be claimed under Travel & Waiting at hearing as there is no other location for it to be claimed. If you wish travel work to be claimed elsewhere you should record it with a preparation rate type.

Just as with other documents, it is possible to export more than one part and to either show the parts separately or to combine them together. If you export two parts that each have their own summary assessment settings the program will attempt to combine the hearing type and dates in a readable manner.

N260A/B

The N260A and N260B were electronic versions of the N260 designed to be compatible with the electronic bill. The N260A was for Interim Applications and the N260B for Trials.

The pilot scheme for which these documents were created did not proceed to a full release, and these documents are therefore obsolete. The templates are no longer created by this version of CostsMaster, but if you have the templates from a previous version of CostsMaster, and you still wish to export in this format, they will continue to export for now but this will be withdrawn in a future version.

Statements of Costs

A statement of costs is very similar to a breakdown but is intended to be used on a summary assessment hearing. It does not follow the N260 format but is more flexible and may be preferable if the Court allows its use, or as a backup document giving more detail. As such all the options in the Breakdown Settings Window apply to statements of costs in the same way as they do to breakdowns.

In addition it is necessary to specify the type of hearing that the statement of costs is intended for (interim, final etc.) and the date of the hearing. This is done in the Parts Window.

If you have previously used CostsMaster 2, you will be pleased to know that we have greatly simplified the steps in order to prepare a statement of costs. All that you need to do is make sure that the work for the statement is recorded in its own part. You then export just that part to the statement of costs.

If the statement of costs is for an interim hearing, once it has been assessed there are various options available to you depending on the outcome of the hearing:

- If the costs were awarded in your favour or against you then the costs in this part will not form part of the final bill. In this case you can either delete the part or mark it as excluded.
- If the costs of the application are awarded to the winner of the full case, you can then either merge the parts for the statement with those for the main bill, or leave them separate and combine them on export.

Just as with other documents, it is possible to export more than one part and to either show the parts separately or to combine them together. If you export two parts that each have their own summary assessment settings the program will attempt to combine the hearing type and dates in a readable manner.

Fixed Recoverable Costs

CostsMaster can produce a Statement of Fixed Costs (Precedent U).

Profit Costs

These are defined by selecting the appropriate options in the Fixed Recoverable Costs Window. Although these costs are not included within a part, you will need to have at least one part in order to specify the VAT settings. If you have more than one part, the settings of the first part will be used.

Disbursements

These are recorded within a part. If you have any parts containing disbursements which you don't want to include you can specify these parts as "Not Exported" in the Export Wizard or in the Edit Part Export Options window.

Breakdown/Statement/FRC Settings

The Breakdown/Statement/FRC settings window allows you to specify the level of detail that is included in a breakdown or statement of costs, to define the fixed recoverable costs that are being claimed and to specify options covering the appearance of the Precedent U.

The following pages are available:

General

This page allows you to specify how the work in a breakdown or statement of costs (but not an N260) is broken down. Options allow you to show work separately for each category, to have the work for each party shown separately and to list disbursements individually.

In addition you can chose to hide figures that contain a blank disbursement and have the figure marked with an "X" instead.

Success Fees

This page allows you to specify how success fees are claimed in breakdowns and statements of costs (but not N260 forms in which there is no facility for doing so). The options allow you to include summarily assessed costs and costs of assessment in the success fee calculation and to include the success fee in the costs draftsman's fee calculation.

Header & Footer

There are five elements that can be included in either the header or footer of the document if you so wish. They are

- Page number
- Date of export
- Company Name
- Reference
- Filename

The company name and reference are recorded in the Local Settings window. The filename is the name you have saved your CostsMaster file as without the full path.

N260

This page contains settings relevant only to the N260.

It allows you to claim Counsel Fees individually or by grouping them as suggested in the N260 form by hearings/non-hearings. If the latter option is selected then the description for non-hearings used in the exported form is drawn from the disbursement description of each Counsel's fee. You should therefore limit the description in this case to something like "advice" or "conference" in order to get a meaningful description on export.

There is also an option to determine whether a schedule of documents is included.

N260A/B

This page contains settings relevant only to the N260A & N260B

Hide Zero Values

When this option is ticked any cells in the spreadsheet that have a value of zero instead appear as blank cells

Export Fee Earner Info For Legal Team Members

When ticked (the default) information from the Fee Earners window is exported to the N260A/B. This is how the N260A/B is designed but it breaks the long standing rule in CostsMaster where Fee Earner info is private to the user and only Category information is exported. If you untick this box then only Category information will appear in the bill.

For Grade Use

This box allows you to specify whether Grade information is recorded in Description 2 or Description 3 of the Category information.

The **Worksheet View** box allows you to specify the default view applied to each worksheet page. The default is "Normal" but you can also specify Page View and Page Break Preview which format the page to reflect how it will appear when printed. This applies only to pages where the columns are designed to be printed and it only applies if the above options to Freeze or Repeat columns are not selected.

Fixed Recoverable Costs Settings

This page allows you to customise the way data is exported to the Precedent U.

Include Costs of Additional Claimants in London Weighting Calculation

Where you are claiming costs for additional claimants and London weighting, this control specifies whether the claim for London weighting includes the payments for additional claimants. The default is ticked.

Show Subtotals

These three controls determine whether subtotals are shown before each of the claims for Additional Claimants, London Weighting and VAT. Where subtotals are not shown, the Calculation column will show the amount on which the figure is calculated. The defaults are ticked for VAT and unticked for the others.

Legal Aid Claims

Introduction

Recording work for a legal aid claim—whether online using CCMS or through submission of a CLAIM1 or CLAIM1A—is done in exactly the same way as for traditional columned bills. There are however a few additional details you will need to be aware of and these are covered in this section.

CCMS Claims are exported in the XML format that is needed to be uploaded. CCMS Supporting Documentation and older style CLAIM1/A forms can be exported in RTF and PDF.

Legal Aid Claim Set Up

Unlike previous versions, CostsMaster no longer has a CLAIM1/CLAIM1A bill type. Instead, you choose from the various documents available on export, at which point you can create a CLAIM1 or CLAIM1A, or a file to submit to CCMS.

Information specific to whichever format you choose is completed in the Legal Aid Claim Settings window.

Legal Aid Claim Settings

 Ctrl + Alt + K

This window is accessed from the Case Details Window or by clicking the Case Details button on the main toolbar and selecting the Legal Aid Claim Settings Settings item from the drop down list that appears.

It allows you to record information specific to the CLAIM1 and CLAIM1A forms or to the CCMS electronic file.

The window is divided into sections accessed by clicking the items in the list on the left. There are sections for various pages on the forms plus separate pages for the various aspects on Fixed Fee claims.

Many of the boxes relating to the CLAIM1 and CLAIM1A forms are analogous to boxes on the completed form and as such their purpose is obvious. We will therefore only detail here those controls whose purpose may not be readily apparent.

General

Claim for costs

This option determines whether the form is for costs assessed by the Court or for costs to be assessed by the Legal Aid Agency. There are eight options:

- *LAA Assessment* - only work recorded within the file will be included
- *LAA Assessment (Court Bills)* - for CCMS claims that would previously be filed with the Court
- *Assessed by the Court* - only costs entered on the Assessed Costs page will be included
- *Assessed by the Court (with FAS to be assessed by the LAA)* - The claim will comprise the costs entered on the Assessed Costs page plus any FAS recorded in procedural steps (the latter to be assessed by the LAA)
- *High Cost Case* - claims costs but no fixed fee.
- *High Cost Case with FAS* - claims costs and FAS but no fixed fee.
- *High Cost Case Events* - claims costs according to the Events scheme.
- *High Cost Case Events with FAS* - claims costs according to the Events scheme together with FAS.

If you choose a "High Costs Case" option without FAS, then choose to export a CLAIM1 form, the "VHCC/HCC" box will be ticked on Page 1.

Form Type

This option determines the form to be exported. If the case is to be submitted to CCMS then select that option; otherwise if it falls under one of the Family Fixed fee schemes select "CLAIM1A". Setting this option has several consequences:

- When exporting you will only be able to export using a template that matches the setting defined here.
- The running totals in the control centre will display the core costs, advocacy and fixed fee separately where the case is not exceptional.

The contents of the rest of this page changes depending upon which Form Type you select.

General (CLAIM1/A only)

Mark Blank Disbursements with an "X"

When selected any blank disbursements will be marked with an X to draw attention to their absence. In addition, any totals that should include the disbursement are similarly marked.

Move blank dates on export

When sorting dates on export CostsMaster will try and keep items with blank dates next to the item that precedes them within the program. Occasionally this is not possible and in this case this option determines if they appear before all other items or after all other items.

Row Height for Schedule of Time Spent

This option allows you to specify the height of the row for the schedule of time spent. This defaults to 0.7cm but can be made larger to make the rows closer to the size of the form. (If the figure is set to 0 each row will be as high as it needs to be to display all text so the rows may be of unequal height.)

General (CCMS only)

Claim Reference

This is the unique reference given by CCMS when the case reaches an appropriate stage, and must be different from any other claim reference submitted by the Solicitor.

Claim Type

This can take the following values:

- *Final*
- *Interim*
- *Appeal*
- *Adjustment*

Provider Location

This can take the following values:

- *London*
- *Non-London*

Date of Court Assessment

This is only available when making a claim for costs *Assessed by the Court* (see above).

Date of Previous Assessment

This is only available when The Claim Type is "appeal".

Defaults

These are used for items where a value cannot otherwise be established:

- *Date* - leave blank to use date of export
- *Initials* - leave blank to use "XXX"

These defaults are mostly to deal with the CCMS requirement that all Disbursements have a date and Fee Earner initials. For the former, CostsMaster will use the **Date Paid** or **Invoice Date** if specified, but if not then this setting applies. For the latter, if the disbursement is embedded within an attendance it will use the Fee Earner of that attendance; if it is within a procedural step that has FAS enabled and a FAS Fee Earner identified it will use the initials of that fee earner; if it is within a procedural step that has at least one attendance it will use the initials of the Fee Earner assigned to the first attendance; otherwise the setting here applies.

The *Date* setting is also used for Standard Communications which by default do not have a date. If you have assigned a date to such items, then of course it will be used, otherwise this setting applies.

Bill Sent To Client For Approval

If this is ticked, then you also need to fill in the Date sent for approval and record the Client's Response, which can be one of the following:

- *Unknown*
- *Approved Bill in Full*
- *Approved Part of Bill*
- *Objected to Whole Bill*
- *The client has not responded*

Bill For Costs Incurred Pre-High Costs

If your claim is for costs incurred before the matter became a high costs case you should tick this box.

Advanced

Clicking the Advanced button gives you access to some lesser used options on the CCMS Advanced Settings Window:

Supporting Documentation

These options allow you to control what information is shown in the Supporting Documentation.

If you choose not to **include Pricing Information** the *Amount* and *VAT* columns will not be shown for Attendances; in addition the Schedule of Work Done will show only the time spent on each item without the resulting cost calculations.

If you choose to **include Full Claim Details** then all information from the front page of the Visual Equivalent will be added to the Supporting Documentation: this is intended for when you want the Supporting Documentation to be the only document sent to the solicitor.

You can choose to include:

- *All items in claim*
- *only items with extra information*

If you select the latter, you can then choose whether Attendances are counted as having "extra information" if:

- *The additional information property is set*
- *There is text in the description*

Similarly, you can choose whether Disbursements are counted as having "extra information" if:

- *There is text in the description*
- *Never*

Lastly you can choose whether to **mark items with extra information in colour** and whether you want to **include a pricing summary**.

Counsel & Experts

Names of Counsel Instructed under the Family Graduated Fee Scheme

This information is created automatically from those Counsel listed in the Counsel Window whose FGF property has been set.

Counsel's Account Information

This information is created automatically from the list of Counsel in the Counsel Window. The account number for Counsel must be recorded there but the amount is calculated automatically from any disbursements and attendances assigned to each Counsel. It therefore updates itself automatically to reflect any changes made to Counsel's fees within the bill.

Experts Meet MOJ Standards?

The **Reasons** box will only be available if you pick "No".

Joint Experts

A new row will be added to the grid when you tab out of the **Apportioned %** cell in the last row.

Assessed Costs

The controls on this page are enabled when you select one of the Assessed Costs Claim for costs options on the general page.

If the assessed costs fall under the PFLRS scheme you will need to specify the Aspect. If you are also claiming FAS costs to be assessed by the LAA you must make sure that the Aspect matches that of the part containing the FAS costs.

The top grid is for entering details of assessed profit costs and disbursements. You can choose from five types of values as follows:

- Profit Costs
- Enhancement (where applicable)
- Advocacy (where applicable)
- Costs of Assessment
- Expert Fees
- Other Disbursements

It is possible to enter more than one type of item if you need to such as where different elements attract VAT at different rates (or are zero rated). In this way it is now possible, for example, to make a CCMS claim with two entries for Costs of Assessment where the main costs attract VAT and the Court fee does not.

For assessed Counsel fees it is necessary to record these separately for each Counsel in the lower grid on the assessed costs page. This grid will include details of all Counsel that have been defined in the Counsel window.

For disbursements, expert fees and Counsel fees it is possible to have CostsMaster calculate them automatically. In order to do this you must complete the Assessed Amount and Assessed VAT fields for each disbursement, either manually or by utilising the tool to mark disbursements assessed as drawn.

Once marked, you can click the appropriate "Calculate automatically" box and the figures will be pulled from the file. For Counsel the figures are added to the existing entries. For expert fees and other disbursements any existing entries in the grid will be deleted and new entries will be created automatically which will include multiple entries if VAT rates differ in order to be compatible with CCMS.

Please note that when marking disbursements to be calculated automatically the figure that appears in the box alongside is an estimate and does not include any Costs Draftsman's fee which will be included in the amount when the form is exported.

CLAIM1A pages

Please see the CLAIM1A page for more details.

Note regarding the "Other Providers Acted" setting

If you are completing a CCMS claim we believe that you should complete this section as follows:

- The “other providers acted” box should be ticked whether you are the first or a subsequent solicitor.
- If you are the subsequent solicitor the “No. of clients represented following change of solicitor” should always be Zero.

- The “No. of clients represented prior to the change of solicitor” appears to affect the pricing of the fixed fee and may need to be set according to the level of fixed fee you expect.

Please note that in care cases, answering "Two or more" to both questions does not appear to be a valid response.

CCMS Advanced Settings

Fixed Fee is Escaped for Special Reasons

The escape threshold for fixed fee calculations is calculated automatically by CostsMaster, but there are special cases where a fixed fee should not be claimed even though the threshold has not been exceeded, such as where a solicitor has been instructed on a case for less than 24 hours, or in cases where the fixed fee might not apply. If yours is such a case you will need to tick this box.

Omit Fixed Fee

Occasionally you may need to make a claim that would ordinarily include the Fixed Fee but not on this occasion, such as where you are claiming only disbursements. Ticking this box will exclude the fixed fee from the claim.

Omit Fixed Fee Attributes

This setting is only enabled when Omit Fixed Fee is ticked and the value of this field generally follows the value of Omit Fixed Fee. However, it is believed that there are some situations where a Fixed Fee is omitted where CCMS expects to see the attributes in the XML file that are only required in Fixed fee cases, such as appeals. In such a case remove the tick from this box to have these attributes included in the XML file.

Claim Pre-HCC Costs as Fixed Fee

Usually, claims for costs incurred prior to the matter becoming a high cost case do not qualify for a fixed fee, but this option will allow you to claim these costs as such.

Recording Work In a CLAIM1

There are three additional things to think about when recording work for a CLAIM1 or CLAIM1A: the legal aid Codes for each item, whether you want an entry for the item in the additional information section of the form and the column in which an attendance time should appear in the Schedule of Work in the CLAIM1 or CLAIM1A form.

Legal Aid Codes

All attendance grids have a field called Legal Aid Activity. Clicking in this field shows a drop down box from which you can select one of the CCMS legal aid activities. When you create a CLAIM1 or CLAIM1A this activity will be automatically converted to the old 3 character code which will be shown against the item in the Schedule of Work.

If you know the old 3 character code you can type this in directly and the program will convert it to the equivalent activity.

The new legal aid activities are not a direct match for the old codes as there is no direct equivalent for the AEX code. This appears as a separate entry at the end of the activity list and can also be typed in directly.

The Parties window allows you to assign an activity to work recorded against that party.

Additional Information

The additional information property specifies whether the description for this item appears in the page 5 additional information section of the CLAIM1 (or page 11 of the CLAIM1A).

In which columns will work appear in the schedule of time spent?

All attendance grids have a field called CLAIM1 Column which determines the column that will be used to show that attendance in the Schedule of time spent. CostsMaster uses the rate class and the legal aid code of an attendance to determine the default value but you can alter this to specify the column directly should you so wish.

List of Counsel's Fees in CLAIM1A

Version 8 of the CLAIM1A form displays Counsel's Fees in a table which includes a date column. If your Counsel's Fees are all claimed within an Attendance or Procedural Step with a date, that date will be displayed in the table for each Fee. Otherwise the Invoice Date or Date Paid will be used, in that order of preference. If none of these are set, the date will be blank.

Recording work for a CCMS claim

When recording work for submission to CCMS, each item of work needs to be assigned a Legal Aid Activity, which replaces the Codes found on CLAIM1 and CLAIM1A forms.

If you are opening an old file that pre-dates Legal Aid Activities, the Legal Aid Codes will automatically be translated into the appropriate matching Activity.

Additional Information

The additional information property can be used to control whether the description for this item is included in any Supporting Documentation you choose to export.

Aspects

There are some extra aspects which are available when preparing a CCMS claim:
- Other Private Law
- Non Family
- First Tier Tribunals
- Immigration
- Mental Health

See also
- CCMS Attendance Activities
- CCMS Disbursement Activities

CLAIM1A

If you wish to produce a CLAIM1A or CCMS claim for a CPGFS or PFLRS case it is necessary to change the setting on page 1 of the Legal Aid Claim Settings window and complete the information on the relevant pages of that window in relation to the fixed fee.

There are six separate pages relating to these, one for each of the aspects covered by the Phase 2 Family Fees plus one for the original 2007 Care fixed fee scheme.

Defining a Fixed Fee

Each page contains details of the factors that determine the fixed fee. When all factors have been completed the fixed fee is shown in the box of that name. CostsMaster comes with sample fixed fees which are correct at the time of publication but should these change you can alter them yourself in the Presets window. You can also alter the fixed fee yourself to a different value but please bear in mind that if you make any changes to the controls that determine the fixed fee, it will be recalculated automatically.

Note that if you have chosen "Family Court" in Case Details then the available choices will be adjusted: instead of choosing the Court in which proceedings conclude, you choose the level of the presiding Judge at said conclusion.

There are also two controls that allow you specify the percentage of the fixed fee that will be claimed (default is 100%) plus the VAT rate that will be used to calculate VAT on the fixed fee (this defaults to the bill VAT rate). For the Finance page you can also specify the Fixed fee for the threshold calculation which can differ from the fixed fee itself if a settlement fee is claimed.

Boxes are also available, where appropriate, for "Other providers acted", "Payment on account claimed" and "Change of Solicitor Half fee". Ticking this last box will cause half the fixed fee to be claimed and must be selected by the draftsman when the circumstances require it. The"other providers acted" box is used for the version 4 CLAIM1A onwards in place of the "Costs of All Providers" box on the general page which is now only used for CLAIM1s.

Setting Aspects

Defining a fixed fee in one of these pages is not sufficient in itself to cause the fixed fee to be applied. It is necessary to set the Aspect for each part.

If the legal aid certificate covers work under separate aspects it is possible to produce claims for each of the aspects by recording work for each aspect in a separate part (or parts). Each part has an Aspect field where you can set the aspect that applies to that Part. CostsMaster will then collate all work for the same aspect into a single claim.

When you export the form CostsMaster will calculate whether the threshold has been exceeded. If it has the claim will be prepared as an exceptional claim (including all costs for Care 2007 certificates and FAS costs for other aspects). If not the fixed fee will be claimed together with a claim for any FAS or other advocacy costs.

Specifying Fixed Fee Presets

All pages except "Care (2007)" contain options for specifying which fixed fee presets to use. Changing this value will prompt an offer to recalculate any FAS entries in parts using the relevant aspect.

Private Law Cases

If you did not undertake work at all levels covered by your certificate, you will be required to explain why. A separate box is provided for each relevant Aspect, the contents of which will appear in the corresponding form if you are exporting more than one.

CCMS electronic file

If you wish to produce a file suitable for uploading to CCMS it is necessary to change the setting on page 1 of the Legal Aid Claim Settings window and complete the information on the relevant pages of that window in relation to the fixed fee.

Family Advocacy Scheme

With CostsMaster it is a simple matter to claim costs under the Family Advocacy Scheme.

Costs under FAS are recorded under a procedural step. Each step has a FAS field which gives access to the Edit FAS window where you can specify the details required.

You can only define FAS settings for a procedural step whose type is "Hearing (solicitor advocate)" or "Advocates meeting". If you open the Edit FAS window in a procedural step that is of a different type the program will warn you and offer to alter the type to "Hearing (solicitor advocate)".

If you open the Edit FAS window in a part where you have not yet set the

Aspect the program will prompt you to do so, If you do not it will not be possible for the program to calculate the fixed fee and you will need to enter this manually.

Changing values in the Edit FAS window will cause the FAS claim to be calculated using the currently defined presets. There are multiple presets available for FAS and you will first need to specify the one relevant to your case in the Control Centre.

High Cost Case Plans

Introduction

This section sets out information specific to High Cost Case Plans. Most work is recorded in the same way as in ordinary bills but there are some differences, particularly in relation to future work.

CostsMaster produces Case plans in a variety of formats, including two following the format specified by the LAA plus an extended family format favoured by some draftsmen for showing the work in complex cases more clearly.

CostsMaster will allow you to record three different types of work in a case plan:
1. Work done before the case became a high cost case.
2. Work done after the case became a high cost case. This covers both work done after the matter became a high costs case but before preparation of a case plan and work which has previously been included in a case plan as future work but has now been carried out and the actual work shown.
3. Future work. This is typically divided into different stages.

Each of the above types of work, and each stage of future work, will appear in its own table in the case plan. You are not obliged to include every type of work and can include only those types relevant to the case at hand.

CostsMaster ships with two sample case plan bills - an ordinary one for use in the trial version and a detailed one for those with a full licence. You are encouraged to open these and see how the files have been set up.

Please note that due to the different way the work is calculated in a CLAIM1/CCMS claim it is quite likely that the costs in the case plan will differ by a few pence as a result of rounding.

Case Plans can be exported to RTF and PDF.

Case Plan Set Up

Information specific to the Case Plan is entered in the Case Plan Settings Window.

Each part within CostsMaster will correspond to a part in the Case Plan (hereafter called a case plan part). Whilst each part needs to be assigned to a case plan part you are not limited to a one to one assignment and it is possible to have more than one part assigned to a case plan part. In this case the work from all parts so assigned will be aggregated.

It is not even necessary for the parts to be in the same order as they will be in the case plan, although in practice they will usually be, and future work will be exported in the order it is found.

Bill Setup

You will need to ensure the following information is completed for use on the Case Plan form:

1. The Solicitor's firm name in the Instructing Solicitor window.

2. In the case details window, complete the case type, then create a party for each client you represent and set the client property for each of them. Then click the edit button for each of the clients and, in the edit window, click the Legal Aid Certificate button and enter the certificate number.

Narratives

The main narrative will be used for the summary of case. The list of hearing dates will be compiled automatically from the information in procedural steps. You may also need to complete some of the other case plan specific narratives in the narrative window (right click and select if they are not visible).

The case plan specific narratives relate to the boxes of the same name at the beginning and end of the case plan. Please note that the current LAA Family format does not utilise the Rates Utilised narrative but this is still used in the extended template.

Part Setup

Create separate parts for post case plan work done and for each future work stage. You can assign these to the case plan parts now in the Part Export Options Window or wait until export and assign them then.

If you are creating an Events Based Case Plan, set the "Anticipated" property on the parts for future work.

Case Plan Settings


Ctrl + Alt + L

This window is accessed from the Case Details window or by clicking the Case Details button on the main toolbar and selecting the Case Plan Settings item from the drop down list that appears.

It allows you to record information for the multiple narratives that can appear on a case plan.

The box on the left hand side lists the different sections that are available. As there are many items that will not be applicable to the type of case plan you are currently working on you can optionally filter this list to show only those applicable to different types of case plan using the drop down box at the top of the window.

Most of the sections are self-explanatory but please note the following:

General Options

Date matter Became A High Cost Case

This box allows you to specify the date on which the matter became a high cost case.

Case Plan Date

This box allows you to record the date of the case plan. If you want the date to be automatically set to the date you export then tick the box below.

Mark Blank Disbursements with an "X"

When selected any blank disbursements will be marked with an X to draw attention to their absence. In addition any totals that should include the disbursement are similarly marked.

Move blank dates on export

When sorting dates on export CostsMaster will try and keep items with blank dates next to the item that precedes them within the program. Occasionally this is not possible and in this case this option determines if they appear before all other items or after all other items.

Previous Solicitors

There are three options here that allow you to specify whether there are any previous solicitors in this case and if so whether their costs are included and whether their costs are covered by a case plan.

Pre-Contract CLAIM1 Submitted

This box allows you to specify whether a claim has already been submitted for costs incurred prior to the matter becoming a High Costs Case.

Final Submission

This box allows you to specify whether this is the final submission made on this case.

Events

This section allows you to specify the rates to use for events case plans. In addition you can specify pre-contract costs.

Events rates are supplied with CostsMaster and are stored in the presets window, where they can be altered if necessary. To specify which rates you want to use you must specify the type of case plan, the Court, contract date and length of hearing. The appropriate rates will then be shown in the grid below.

If you select one of the Solicitor Advocate case plans, additional boxes will be available as for these the rates for attending hearings with Counsel differ from that when appearing as advocate.

It is also possible to specify additional rates for cases where more than one rate is used for a single fee earner. Additional rates are added by right clicking in the grid and selecting the appropriate option. There is a new control in the Procedural Steps Events window where you can specify that an event uses an additional rate.

Although the rates conform to the Solicitor/Junior/Leader sections, it is also possible to rename the headings for each section, so where, for example, you had two solicitor advocates and no counsel, you could rename the Junior Counsel section and use this for the second solicitor, and the rates will be shown in separate sections rather than being combined together.

For each section it is possible to specify whether 5% Uplift is claimed and for the two counsel sections, it is possible to indicate that the work claimed here should be billed as solicitor. This should be done if you intend to repurpose one of these sections for solicitor costs and you want the work to appear in the CCMS claim.

Case Management Information

This section allows you to record details of the people who have worked on the case for inclusion in the section of the same name in the case plan. Whilst you can simply include the names of Counsel and experts here there are options to automatically include this information on export if you have chosen to record it elsewhere in CostsMaster.

If the option to include Counsel is ticked the program will automatically insert the names of any Counsel defined in the Counsel window who have work assigned to them. If the option to include experts is ticked the names of any experts defined in the section of that name on the case plan window are automatically included.

When either of these options is ticked the names will be included at the first instance of a blank line in the case management information section. If there is no blank line the names will be added to the end of the case management information.

The other options on this page simply relate to boxes on the case plan form and do not require further explanation here.

Recording work in a standard case plan

Work done pre-Case Plan is recorded in the normal manner, but future work is treated differently.

Here is an excerpt from an exported case plan showing part of the section for future work:

Part 3 - Future Overall & Staged Costs - all figures exclusive of VAT		
KEY EVENTS & DATES	**WORK**	**TIME EST**
Stage 1 - Stage One: Future Overall & Staged Costs up to hearing on 30 August 2007		**Solicitor**
(stage one will start from the date of the preparation of this case plan or the date of your request on form CLSAPP8 for costs which led us to requesting you to complete a case plan, whichever is the earlier	*The outstanding work is identified as follows (detail individual activities)*	*Estimated Solicitor Hours*
03/07/2007 – Pre Hearing Review	Preparation for pre hearing review including considering large bundle of notes, receiving and considering threshold document Panel Member Preparation: Panel Member Conference:	 2:00 2:30

You will see that future work is split into "events" that have a date and description and one or more items of work. There is no "Events" window in CostsMaster but the Procedural Steps window can double for this with ease, therefore it is recommended that you record all future work as procedural steps. Any work recorded in a part that is assigned to future work that is not in a procedural step will still be included in the case plan but it will be grouped together and summarised after the events.

You will need to create a procedural step for each event. The date and brief description ("Pre Hearing Review") of the step are used for the date and description of the event. If anything has been included in the procedural step "main" description it will be displayed in the work column as further detail of the work undertaken. In the example above that is the paragraph commencing "Preparation for pre hearing review...". Please note that if no brief description is given then the "main" description is used instead for the event.

Within the step each item of work is created as an attendance or disbursement. So the first item in the example above would be an attendance with the description "Preparation", assigned to the fee earner "Panel Member" and with a time of 2 hours.

Routine work is entered in the same way with the rate type changed to telephone calls, letters out, emails out or letters in and the number of items entered in the time/items column.

Disbursements appear at the end of an event but embedded disbursements appear immediately after the attendance in which they are embedded.

If no description is used for an attendance the default description of the rate type is used, thus for routine items you can omit the description altogether and let the program name them "Telephone calls" etc.

The LAA's pro-forma non-family case plan shows Counsel fees in future work as time calculated at an hourly rate. You can achieve the same result by recording Counsel fees as an attendance which is assigned to a Counsel for which the appropriate rates have been set.

Recording work in an Events Based Case Plan

CostsMaster now supports the creation of Events based case plans. In these the costs are calculated based on the number of "events" that occur or are predicted to occur.

The first step is to choose the appropriate type of Case Plan, which you will find in the Case Plan Settings window.

Event details

An "event" is defined by creating a procedural step and opening the Edit Events Window, where you specify the type of event and who attends (or not).

When a procedural step has this information defined and is exported to an Events based Case Plan, the procedural step will be listed in the plan as an event with its description. The Solicitor and Counsel columns in the plan will contain the appropriate initials, or "X" if no particular Fee Earner is chosen: this will be in the "Anticipated" column if the part is marked as future work (using the "Anticipated" property), and the "Actual" column otherwise. In addition any attendances recorded for the step will be ignored.

The Events properties have no effect when a procedural step is exported to any other type of document. In this way it is possible to record work for a traditional case plan and also mark it as an events based case plan. By exporting both types of document you can easily compare the differences between the two.

Counsel Fees

A Counsel "event" is defined as above whereupon any Counsel fees recorded for the step will be ignored.

If Counsel has opted to claim fees under the FGF or FAS scheme then you should instead apply the Counsel FGF property. This will cause the Counsel fees recorded within the step to be included in the Counsel FGF/FAS table (as appropriate) and claimed in the case plan.

If you are preparing a Case Plan under CCFS and wish to claim "Counsel Disbursements" then do not apply the FGF property to the procedural step containing the relevant fees. It might therefore be necessary to add an extra procedural step, with the same date but differing FGF property setting, to allow both "Counsel FAS" and "Counsel Disbursement" items to be claimed.

NB: such "Counsel Disbursements" recorded under procedural steps marked with the FGF property will be ignored on older case plan templates, and the totals will not match.

Disbursements and Expert Fees

Disbursements and Expert Fees are recorded as for standard case plans.

Previous Solicitors

The costs of previous solicitors can also be recorded. Depending upon which kind of Events Based Case Plan you want to prepare, there are two ways of doing this. It is however recommended to enter such costs in a separate part as usual.

If you are preparing a Case Plan involving multiple Counsel for the SCU, these costs are not shown separately: they should be entered in the usual fashion and will be exported along with costs of current solicitors.

If you are preparing a Case Plan for the VHCC, involving a single Counsel or a Solicitor Advocate, these costs are shown in a separate section, known as "Form L". They **must** be entered in a separate part and are not entered as ordinary work: instead the totals are entered in a special window which is accessed from the Edit Parts Window. When you close this window you will be asked if you want to mark this part as covering previous solicitors work. When a part is so marked the total costs entered will appear in the previous solicitors table in the events case plan and all other work except Procedural Steps will be ignored. This setting can also be set in the export wizard.

You will also need to enter details for the hearings to appear on Form L. You need to enter the date, and the "Event Type": this will be the Description unless a Brief Description is present. Enter the Event details in the usual fashion which will be shown in the "Solicitor/Counsel/Both" column.

Enhancement in Case Plans

Enhancement in case plans is claimed in exactly the same way as for other bills.

One further feature, available in the extended format case plan, is the automatic identification of routine work. Case plans claiming work done traditionally distinguish between work done with no enhancement or panel member enhancement and that done with other types of enhancement.

CostsMaster will automatically add the word "routine" to all work attracting no enhancement or where the only enhancement claimed is Fee Earner or Category Enhancement.

Costs of Preparing The Case Plan

CostsMaster makes a distinction between costs of assessment claimed in a part showing work done prior to the case becoming a high cost case, and costs of assessment claimed in other parts. The former will usually have been claimed in a CLAIM1 and for this reason these assessment costs are always included within the case plan part itself.

For future work, however, you have the choice of having these costs appear in the case plan part or showing them together in a special part at the end of the case plan. The option to do this can be found in the Costs of Assessment window. Please note that this setting will affect all costs of assessment but will not affect any costs of assessment claimed in other parts, for which the option must be separately set.

Costs Draftsman's fee at a percentage

It is technically possible within CostsMaster to claim a Costs Draftsman's fee at a percentage within a case plan (although we understand that it would be unusual to do so). However the format of the case plan presents several traps for the unwary and if you do choose to use the feature in a case plan you should exercise extreme caution, especially if you are merging parts or exporting them in a different order.

Because the costs incurred pre-contract have usually been claimed on a CLAIM1 there is a "Chinese wall" between pre-contract and post-contract costs as regards the costs draftsman's fee. If a costs draftsman's fee is defined in a part assigned on export to a post-contract part and the range of parts to which it is applied includes a part that is assigned on export to a pre-contract part, the costs of the pre-contract part will not be included in the calculation. The converse applies also.

Also, if you select the option to include the costs of assessment in a separate part, the costs draftsman's fee will be calculated on the total figure shown in those parts and will not include any costs of preparation which will now be shown in a separate part. If claiming a costs draftsman's fee in these circumstances it is recommended that you do not select the option to show the costs of assessment in a separate part.

Reports

Introduction

CostsMaster allows you to produce reports of the work you have recorded. At present only Disbursement reports can be exported but other reports will be added in future versions.

Reports are designed to give you a record of the work recorded within CostsMaster and do not take account of properties that apply to export, such as Excluded, nor do they have access to elements that are calculated on export such as success fees or costs draftsman's fees where calculated automatically, or even numbering which is applied on export. In some cases, there are alternative "schedules" (e.g. the disbursement schedule) which can be exported alongside some documents and do have access to all the above.

Reports can be exported to RTF, PDF and XLSX.

Report Settings

 Ctrl + Alt + G

This window is accessed from the Case Details window or by clicking the Case Details button on the main toolbar and selecting the Report Settings item from the drop down list that appears.

It allows you to specify which type of disbursements and which fields will be included in a disbursement report or disbursement schedule.

There are separate sections where you can choose to include Counsel Fees, Expert Fees and Other disbursements. For those that you have selected you can choose which of the available disbursement fields you want to appear in the report. You do this by ticking the check box to the left of the field name. If you hold the Shift key whilst doing this, any equivalent field in the other two sections is given the same value. If you hold the Ctrl key whilst clicking, then the value is also applied to the following sections.

Because it is possible for the user to select a large number of columns, this can have a negative impact on RTF/PDF documents which have a fixed page width, with the document becoming unreadable and even possibly corrupted. Each column therefore has a minimum width that it needs to display and if the total width will exceed the limit for the page, any additional columns will be dropped in order to maintain the integrity of the document. No such restriction applies to XLSX documents which are therefore preferred for documents containing a large number of fields.

For Counsel fees, it is also possible to show the FGF/FAS status of Counsel fees in the disbursement report and to also include Counsel Success Fees in the disbursement schedule.

Please note that a report is different from a bill or other exported document in that it is a report of the work recorded which may include excluded items. It is therefore possible to opt to show whether the item is excluded. If you want a schedule of disbursements to accompany a bill you should look at the Disbursement Schedule which can be exported to accompany an electronic bill.

Chapter 7

Creating Documents

Exporting The Document

Introduction

Ctrl + E

When you have finished recording work, you need to export the document for sending to your client and ultimately to the Court or Legal Aid Agency.

CostsMaster can export your document for editing in a Word Processor or it can generate a PDF file which you can send electronically without fear of it being altered. Some documents such as Costs Budgets and the electronic bill can be exported to an Excel spreadsheet.

When you click the Export button you will be taken through the steps needed to create the bill by the Export Wizard.

The Export Wizard

The export wizard takes you step by step through the process of specifying the form and content of the exported document.

Each page has one or more options to select. The "next" button takes you to the next page and, should you need to review a decision made earlier in the process, the"previous" button will allow you to retrace your steps. If you want to abort the process you can click the "cancel" button.

The changes made in the export wizard are saved when the wizard closes and reused the next time the wizard is run. In addition you can save the changes before the end using the "Apply" button. This can be useful if you want to make changes in order to preview a document without having to actually create an exported document.

If you have already been through the wizard and made your choices, but subsequently need to perform a further export, you can click the "Export Now" button which will skip the following pages of the wizard and use the choices made previously.

We describe here the pages that are common to all documents but certain pages will appear only for certain types and these will be explained later in the section on exporting particular documents

Select the documents to export.

For each type of document you can select one or more export templates that will determine the format of the document. It is therefore possible to export more than one type of document simultaneously. By default, only the latest versions of templates are shown but there is an option to show superseded templates, should you need to use an old format for a historical case.

When exporting a bill there are sub-entries for Front & back sheets and Schedules. These can be exported on their own without the bill (by simply not selecting a bill to export), with the bill as separate documents or included within the same document as the bill (by ticking the "include with bill" tick box).

Please note:
- when included with a bill these documents will use the font and other settings of the bill and will ignore any settings defined for the template.
- when included with a bill only the first of each type of document will be exported.
- if you export a bill without selecting a documents schedule, and the bill settings require the production of a documents schedule, the default documents schedule will automatically be exported (rather than export an incomplete document).

Specify the type of file to export.

You can choose from Word Processor documents or Spreadsheets (for some documents only), which can be edited afterwards, or PDF files which are read-only.

You can also specify whether each type of file should be opened for viewing by CostsMaster.

Specify where the file should be saved

This window gives you the option of:

- **Saving the file automatically** - this saves the file in the same location as the saved CostsMaster file with the same name plus a suffix to denote the type of exported document. This is the default and will be automatically selected unless the user chooses to alter the setting. Any alterations made will be stored and reused the next time the Wizard is opened.
- **entering a name if the file already exists** This allows the user to choose a different name for a file instead of overwriting the previous copy of the document.
- **always choosing where to save the file** This allows the user to always select where the file should be saved, rather than in the default directory.

Default Location This allows you to specify the folder where the document will be saved. By default it shows the location specified for Exported Documents in the File Locations page of the Local Settings Window.

Part Assignment

There will then follow any pages specific to the types of document you are exporting where you can assign parts, followed by:

Other Options

Include a draft watermark

This page allows you to incorporate a watermark on the document, particularly useful if you wish it to be clear to the client that it is only a draft version. Not all word processors support this.

Include notes

Any (non-private) notes that you have recorded in CostsMaster can optionally be exported to the bill. These will appear as annotated comments and can be useful if there are many items you need to bring to the attention of your client. Please note that not all Word processors support this feature and that the format of the document you are exporting may restrict the ability of CostsMaster to export certain notes. Where this applies full details are given in the section on exporting particular documents.

Sort Items By Date

When this option is selected CostsMaster will automatically sort any items that appear by date order. Not all exported items appear in this way (e.g. in a case plan pre-contract work is collected together and ordered by its type) and any such items will not be affected by this setting. Where items do not have a date CostsMaster assumes that you want them kept in the approximate order that they appear and attempts to do this where possible.

Show Letters In Where The Rates Are Zero

Usually, any letters in recorded are only shown in the exported bill if the applicable rate for letters in is not zero. Sometimes you might want to show the letters in even though they are not claimed (e.g in order to indicate a large number that required your response). If this option is selected all letters in recorded will be shown in the exported bill.

Export Bill Totals to File

This option will cause the creation of an XML file alongside your document containing the totals from the bill. This can be used to load into your practise management system for billing on analytical purposes. Please see the section on XML Totals for more information.

Options specific to the type of document(s) being exported

A further page may appear with options specific to the type of bill you are exporting. Details of these options can be found in the sections on exporting specific documents.

Assigning Parts

For each bill type you choose to export CostsMaster lets you decide which parts you want to export, the order in which they are exported and whether any parts are combined together in the finished bill.

For each bill type you are exporting you will be shown a grid listing each of the parts you have defined in CostsMaster. For each part you will be able to change a range of options. Some of these options are specific to certain bill types and are explained fully in the sections on exporting those bills. The two settings common to all bills are:

Export To

This allows you to choose from three options:

- **Not Exported** - this part will not be included in the exported document.
- **Next Available Part** - CostsMaster will export this part and will assign it the next available part number. Parts with this setting will export in the order they appear in the Parts Window.
- **Specific Part** - this part will be exported with a specific part number that you can define.

Export Part No.

This setting is enabled only when the above setting is set to "Specific Part". It allows you to specify the part number it will have on export and can be used to combine parts together (see below). Parts with this setting will export in ascending order of the part no. You can therefore use this feature to alter the order that the parts export. It is even possible to skip a part number for any reason (say if a previous solicitor's costs are being prepared by a different draftsman).

Combining Parts

If you want two or more parts to be combined into a single part on export simply set each of them to "Specific Part" and set the part number to the same value.

Mixing Settings

It is perfectly permissible to use a combination of parts set to "Next Available" and "Specific". In this case any parts set to "Next Available" will be interposed in any gaps in the numbering of specific parts.

Please note that the settings on this page reflect any settings you have already made in the Part Export Options window. Changes here will be applied to the part for future use.

Part Narrative

This setting determines how any part narrative or enhancement justification is used in the bill. The available options are:

- **None** - any part narrative recorded or enhancement justification is not exported
- **Instead of Narrative** - the main narrative and enhancement justification are not exported and the part narrative and enhancement justification appear in their place. If more than one part is exported the narratives and enhancement justification for both parts will be combined.
- **Appended to Narrative** - any part narrative will appear after the main narrative and likewise for any part enhancement justification. Please note that if some parts being exported are set to append to narrative and some to instead of narrative they will all be treated as being append to narrative.
- **In the Part** - The main Narrative and Enhancement Justification will appear as normal and any part narrative and enhancement justification will appear within the part. Depending on the type of bill and the settings chosen this option may not result in the part narrative being exported. For bills the part narrative will appear after the part heading and additional description but for CLAIM1s the part narrative will appear only if you have opted to show the part heading in the page 4 schedule, in which case it will appear after the part heading.
- **With the Rates** - For bills only, this option will result in the part narrative appearing wherever the rates appear in the bill. The bill settings window lets you choose whether the rates appear at the beginning of the part, after the narrative in the bill or on the front sheet. This option will result in the part narrative appearing before the rates, wherever they might appear, and the part enhancement justification appearing after the rates.

If a part is not exported its part narrative cannot be exported.

The part narrative setting is stored separately for each type of bill so it is possible to, for example, have a basic narrative that is used for a case plan and part narratives that are used for a CLAIM1, or to record a general overview in the main narrative and work specific to the parts in the part narrative. If you set the part narratives to append to narrative, the main narrative will automatically cover only the parts you export.

Default Category

You can use this column to specify a default category for each exported part. Where a default category is defined the category name is not shown against each item of work but is instead described at the beginning of the part.

Previewing The Document

Ctrl + P

If you do not want to export a final document but only wish to see the work you have recorded so far, it is possible to create a near instantaneous preview of the document within CostsMaster.

This preview skips the export wizard and uses the default values. However, if you have previously been through the wizard it will utilise the choices you made then and apply them to the previewed bill.

When you click the Preview button on the main toolbar or on the menu a sub menu will open with options for each type of bill that can be previewed. If you use the above shortcut it will show the last type of document previewed.

The majority of documents are previewed using a word processor (RTF) format. However som, such as the electronic bill and costs budgets, can be previewed using a spreadsheet (XLSX) format. This latter shows the separate worksheets as tabs which you can select. It is therefore closer to how the exported spreadsheet will look. Please note that there are some options for the electronic bill relating to sorting which, if enabled, can mean it is not possible to export or preview the electronic bill in the RTF format. In this case the spreadsheet preview option will be the only one available.

If you have more than one template for any document type selected in the export wizard the RTF preview will preview all the selected templates, one after another, whereas the XLSX preview can only show one document, so you will be given the option to choose which you want to preview.

Creating Bills

The following information relates only to the export of columned bills.

Assigning Parts - Include In Legal Aid Schedule

This determines whether the costs in the part get included in any Schedule of inter partes costs at legal aid rates that is exported.

In the export wizard this column will only be visible if a Legal Aid Schedule is selected.

Export Templates

CostsMaster comes with over 30 different bill templates. If some of these are not appropriate for the type of work you do you can suppress their display in the Export Templates window.

Bills can optionally be created as a single document with a front and back sheet at either end and with documents schedules included, so if you need to email your bill you now need to send just one document.

Most settings for the bill are made in the Bill Settings window.

It may also be useful to set out a brief summary of the differences between the various templates:

Three, Four and Six column templates

Three column templates are probably the format favoured by most costs draftsmen. They claim VAT, disbursements and profit costs in separate columns.

Four column templates claim VAT Claimed, Costs Claimed, VAT Allowed and Costs Allowed *(see also the CPR variant below).*

Six column bills are used when claiming both inter partes and legal aid costs *(see also IP-LA below)*.

IP-LA

Templates come in inter partes (IP), legally aided (LA) or IP-LA variants.

Three and Four Column bills come in variants for inter partes and legal aid work. Exporting a file that has both inter partes and legal aid work using, say, a 3 column IP bill will include only the inter partes work, ignoring all the legal aid work.

IP-LA bills are used for bills that contain both legal aid and inter partes costs. All six column bills are IP-LA but there are also IP-LA versions of the three and four column bills where the inter partes and legal aid costs are automatically split between parts.

CPR

For four column bills, the CPR variant follows the exact order of columns suggested by the Civil Procedure rules, namely Costs Claimed, VAT Claimed, Costs Allowed and VAT Allowed.

Phase Bill

When preparing a Costs Budget, work is divided into Phases. The Phase Bill splits each exported Part into Phases to correspond with the Budget. A Phase Bill variant is available for all templates which include an IP aspect.

Family Fixed Fee

These bills are used for legal aid cases under the various family fixed fee schemes. In these bills advocacy work is shown in italic and enhancement can optionally be shown separately from core costs and displayed in bold.

Landscape

The six column templates have a lot of information and to fit it all in not only is the default font size smaller than other bills, but the description column is narrower too. For this reason we provide alternative six column bills in landscape format which don't suffer from this width restriction.

Traditional templates

The standard templates use word processor tables for their layout. This makes for an easily controlled bill but this format can be awkward to edit in your word processor if you are unfamiliar with tables (although we would urge you to learn this because it is not difficult). As an alternative some templates are provided in "traditional" format which uses free flowing text with alignment governed by tab stops. This is the style of document produced by previous versions of CostsMaster. Whilst this is straightforward to edit, Word is the only word processor capable of handling this type of document as it relies on being able to tab beyond the right margin, something no other word processor seems able to do.

Creating a Costs Budget

Costs budgets are exported in the same way as other documents. However, because work in a costs budget is grouped by phase there is no option to assign the parts you wish to export and should you need to exclude a part from the budget you will need to set its excluded property within the program.

Precedent H Costs Budget

This can be exported as a word processor document, ideal for printing, or as an Excel Spreadsheet that can be used at the hearing where the budget is set. There are two forms of Precedent H, one that follows the published form almost exactly and one with a revised arrangement of pages which we feel presents the information more clearly.

Costs Budget Discussion (Precedent R)

This document contains details of the offers and counter arguments made in respect of an opposing budget.

Supporting Documentation

The Precedent H budget only includes summaries of the work included in the budget. If you wish to back up the budget with more detail, you can produce supporting documentation covering your own choice of phases and detail and grouped either by task and activity or by location. Please see the section on Costs Budget Settings for more information.

Costs Budget Comparison

This document allows you to compare the costs between opposing budgets on a phase by phase basis.

Costs Budget Report

This is a report of how the costs recorded in CostsMaster compare with the costs set in the budget and is intended to be sent to the client or fee earner for information.

Creating a Breakdown or Statement of Costs

The following information relates only to exporting a breakdown or statement of costs.

When exporting a breakdown or statement of costs you can choose which parts are exported and, if desired, merge parts together just as you can for other bills. Indeed for a statement of costs for an interim hearing it is necessary to record the costs for the statement in a separate part (or parts) from other costs and choose to export just these parts when creating the statement.

Creating a CLAIM1 or CLAIM1A

The following information relates only to the export of a CLAIM1 or CLAIM1A form.

The exported form in CostsMaster 3 and later differs from that in CostsMaster 2. In this version the form is exported to a word processor document and the Form Viewer is no longer required to view or edit it.

Because of this the layout of some parts of the form has changed. Items such as the page 4 schedule and narrative will now flow continuously across pages rather than be shown as separate pages at the end.

The forms copy the original LAA forms closely which means that it is still necessary to show some items in an additional addendum page at the end. Where this is done the layout of the items has been much improved and in the case of routine items it mimics the layout of the page 7 routine table but gives far more detail. Because Information is placed right up to the edge of the page it is important that when printing you set your printer to print on A4 sized paper. Some printers default to using the US standard “Letter” paper which is slightly shorter and wider than A4. This will result in the very bottom of the form being cut off. In addition if you add a draft watermark (which is placed in the header of the document so that it can appear behind the text) most word processors will leave space for the header even though there is no text there. This will result in the bottom of the pages being pushed over to the next page.

Add a line between parts

If this option is selected and you have chosen to export two or more CostsMaster parts to separate CLAIM1 parts, the parts will be separated in the page 4 schedule, page 5 additional information and page 7 disbursements by a line with the Part number and description.

Selecting the appropriate template

The export wizard will present you with a list of the CLAIM1 or CLAIM1A forms available to use on your system. It makes this choice based on the CLAIM1/ CLAIM1A setting on page 1 of the Legal Aid Claim Settings window.

Creating a CCMS Claim

The following information relates only to the export of a CCMS Claim.

CostsMaster will actually produce two files when requested to prepare a CCMS Claim. One is a human-readable file which will be in word-processor format or PDF according to your preference; the other is an XML file for uploading to CCMS. In the human-readable version, any values that will cause the file to be rejected by CCMS will be coloured in red, whilst any values that might cause the file to be rejected, or where CostsMaster has altered the value to make it compatible, will be coloured yellow. Items that are reminders to the draftsman are coloured blue.

You also have the option of producing CCMS Supporting Documentation, the contents of which you may select via the Legal Aid Claim Settings window. If you would prefer to send only this document to your client, you have the option of including the Full Claim Details as per the human-readable version of the CCMS Claim.

Creating a Case Plan

The following information relates only to the export of a case plan.

Assigning Parts - Case Plan Part.

When exporting a case plan an extra column appears on the part assignment page allowing you to specify the Case Plan Part from the following options:

- Pre Case Plan Work Done - this covers work done before the case became a case plan.
- Post Case Plan Work Done - this section can be used if you want to show work already done after the case became a case plan in its own section rather than as future work.
- Post Case Plan Future Work - this is your estimate of work to be done for the duration of the case.

Each of these has a different format on export (although the differences between the two work done types is limited to the heading).

Some things you should be aware of:

1. This setting determines the format of the part on export, not the order in which the parts will appear. It is your responsibility to ensure that the parts export in the correct order (either by having the parts in CostsMaster in the correct order and setting them to "Next Available Part" or by specifying the

part numbers directly).

2. Because any parts with the same Export Part No. will be combined in the bill, any parts that are to be combined must be assigned to the same case plan part. CostsMaster takes care of this automatically so:
   - if you change this setting for such a part, any other parts set to the same export part will have the setting changed also.
   - if you change the export part no. to a number already used, this setting will be updated to match that of the other parts.

Assigning Parts - List Hearings

This option determines whether the dates of any hearings in this part are included in the list of hearings that appears at the beginning of the exported case plan. By default any pre-case plan parts are set to have their hearing dates included but you can alter this for any part should you wish to do so.

Include notes

This option, on the Other Options page, has special implications for case plans. It is not possible to export notes for many items as the layout of the case plan gives nowhere for, say party notes to be displayed. The following notes can be exported for a case plan:

- Bill Notes - These are shown attached to the heading of the case plan.
- Part notes - These are shown attached to the heading of each part.

In the work done sections:
- Attendance Notes - As attendances are grouped together by fee earner and type any notes attached to them will be similarly grouped. The note will have the location, date and description added to the beginning otherwise it would not be apparent which item the note was referring to.

In the future work sections:
- Attendances - as attendances are shown individually in the future work sections the notes are shown against the item they relate to.
- Disbursements - these are also shown individually in the future work section so the notes are shown in the same way as for attendances.
- Procedural Steps - These are shown attached to the event heading.

Additional Options

There is an additional option to specify whether the list of hearing dates appears with each date on a separate line or with all dates in a single line separated by a semi-colon.

Creating a Notice of Commencement

CostsMaster can optionally produce Notices of Commencement of Assessment proceedings. The Court fees and other information is recorded on the case details window and on export you simply need to select an appropriate Notice of Commencement template from the drop down box in the export wizard.

Creating A Report

CostsMaster allows you to export a report of all disbursements *recorded* within the file. Unlike other documents, a report will include any disbursements marked as excluded and it is not possible to limit the report to a range of parts.

The Report Settings Window allows you to specify whether to show Counsel's Fees, Expert Fees or Other disbursements, and which fields to include for each of the above types.

Export Phrases & Export Templates

Export Phrases

Alt + Shift + E

Export phrases are used to describe the content and format of different lines in the exported document. They can include plain text that you can alter plus references to elements of the items you record in CostsMaster, such as attendances, disbursements, parts etc. On export these references are used to export the data you have entered. In addition, the phrases contain information about how dates and amounts are to be formatted and the typographic formatting of the text.

All these elements can be altered to give you complete control of the appearance of your exported documents.

The Export Phrases window divides the available phrases into sections which are displayed in the box on the left. Selecting one of these updates the right hand side to show further details. The sections that are displayed here can vary depending on how the window was opened. If Opened from the Options > Export Phrases menu item on the main window then all available sections will be visible as well as export options. If however the window is opened by clicking the "Export Phrases" button in the Export Templates window, only the phrases relevant to the currently selected template will be shown.

When you select a phrase section the left hand part of the window reveals a further list in the middle of the screen plus other controls on the right. The middle list shows all the available phrases in the currently selected section. Selecting one of the phrases results in the controls on the right updating to show the contents and formatting of that phrase, giving you the ability to alter the phrase if desired.

Export phrases give you a lot of control for editing but that control can make them a little complicated. There are therefore two ways of editing export phrases: simple mode and advanced mode. You can switch between the two modes using the tabs at the middle top of the window.

Override the Global Phrase with the phrase in this template

This tick box will only be visible if you have launched this window from the Export Templates window. As well as the global export phrases, each template has its own set of phrases. When this box is unticked it means the global export phrase will be used, but if ticked the template's own phrase will be used instead.

Preview

The preview button will generate a short preview document of the currently selected section in order to see the effect of changes. The preview will use work recorded in the file so it is necessary to actually have work in the section in order to see the effect. In addition some additional work may also be shown.

In simple mode you are able to edit the text of an export phrase and make formatting changes that affect the phrase as a whole. More detailed editing is available in advanced mode.

Primary Text

This is plain text that is exported to a document exactly as it is entered. For example, the Heading phrase in the Bills - Rates section has by default the text "Rates Utilised", but you can alter this should you want your rates section to be headed differently. Not all phrases have primary text. The item phrase in the Bill - Documents section for example has no plain text because its content is created from each entry you have made in the Documents window.

Secondary Text / Description

A very few phrases have two pieces of text, usually where plain text is split around an element that is drawn from the file. The Default Category Description phrase in the Bill - General section has primary text of "All work carried out by" and secondary text of "except where stated otherwise". On export this would be placed either side of the Default Category so it might read "All work carried out by Partner except where stated otherwise".

This box behaves slightly differently for properties. Property phrases are used to show a visual property from within CostsMaster (such as "estimated") in a textual form for export. Not all properties in CostsMaster have meaning in an exported document, and only those that are used in exported documents are shown here. For properties the Secondary Text box allows you to record the description that is appended to the narrative where a property is used in the bill. So if you look at the estimated property you will see that the Description is "Estimated time is marked (e)" to explain the presence of the "(e)" estimated markers in your bill.

Character Style / Set Style

It is possible to set the character style for the phrase as a whole by ticking the Bold, Underline and italic boxes. Where a phrase has one or more of these attributes the boxes will be ticked and the "Character Style" text will display with the appropriate style settings by way of illustration.

Setting these values in Simple Mode will apply them to the entire phrase. In advanced mode it is possible to apply them selectively to elements of the phrase. If the phrase has differing formatting the boxes to set the character style will not be visible but instead you will see a button labelled "Set Style".

When you click this you will be warned that the separate styles will be lost and a universal style applied instead.

Formatting

At the bottom of the simple tab are various formatting controls that control the exact form that dates, times, currencies and other elements can take. These may or may not be visible depending on the phrase. Only if the phrase contains an element capable of being formatted in that way will the relevant page appear.

The available options for the formatting controls allow you to select an item by way of example (so the Day control in the date formatting will have options for "8", "08", "8th" and "none". An example of the full formatting is displayed above the formatting controls. The example that is used can be altered using a box at the bottom of the formatting controls.

The various formats and options are described in the reference section.

In Advanced mode you are given access to each element of the export phrase. As well as setting formatting for each item individually you can alter the order of items and specify the text that appears before or after an item.

The elements of the export phrase are shown in a box near the top of the advanced tab. If you select the Item phrase within the Bill - Documents section you will see a range of text representing an entry for a documents item in a bill. You cannot edit the text directly but if you click on different parts of the text you will see the element that you have clicked on highlighted in yellow.

Show Examples / Fields

At the top left of the export phrase is a control that toggles the phrase between showing example text and the name of the internal field element. For example if you leave this set to examples the first element is a date displayed as today's date. If you change the control to show fields this element is now shown as "<DATE>". When showing fields it is a little easier to spot which elements are present but showing examples makes it easier to understand the purpose of each element.

Move Position

To the top right of the export phrase are two buttons that will move the currently selected element to the left or right. This makes it possible to reorder the elements of the phrase so that they appear in the order you want.

"Superfluous" Elements

Looking at the documents item example you will probably be thinking that it contains more than you would want to see in a bill. The reason for this is because it shows items that may or may not appear in the bill depending on whether certain conditions are met.

For example the documents item has a time element ("2:06") followed by an items element ("25") and a Lump Sum element ("£1234.56"). For any given documents item only one of these will appear, usually the time, but if you recorded a lump sum figure then the lump sum element would be used and if you recorded an attendance at a unitary rate type the items element would be used.

Furthermore there are several elements such as the Category Name ("Partner") that will appear only if it is not the default and the Rate Class ("Advocacy Rate") that will appear only if you have recorded an attendance at a rate type that differs from the default for that section (preparation for the documents section).

Character Style

Just as in simple mode it is possible to set the Bold, underline and italic styles plus the font size but in advanced mode you apply them to individual elements. Should you wish to apply a style to all elements you can click the "Apply to All" button.

Conditional Text

There are two controls for Conditional prior and post text. These are used to add plain text either side of an element but in such a way that the plain text will only appear if the element appears. We mentioned above that there are situations where an element may not appear, such as the rate type which will only appear if it is not the default for that section. In the Documents item example the rate type "Advocacy" has conditional prior text of "(" and conditional post text of " rate)". This means that if the rate type appears it will be wrapped in parenthesis and have the word "rate" appended as it appears in the example. If the Advocacy rate type does not appear then the parenthesis and word "rate" will not appear either.

Formatting

At the bottom of the tab you may see various controls that allow you to format the selected element. Unlike Simple Mode, only one set of formatting controls is visible at a time and only if the currently selected element supports such formatting. So if you click on the time element ("2:06") you will see controls that allow you to specify the format of the time element. You can also change the example used (and if you have already done so you will understand why my examples above may not accord with your copy!).

The various formats and options are described in the reference section.

Restore Default

You may find that in exploring the possibilities of the Export Phrases window that you make one too many changes to a phrase. Fear not, the "Restore

Defaults" will return it to the state it was when CostsMaster was first loaded. Please not that all changes you have made to this phrase since installation will be lost.

Export Templates

The Export Templates window can be accessed from the Options menu.

Export templates are collections of settings relating to the formatting of the exported document, such settings being easily adjusted from within CostsMaster.

On the left of the window is a list of folders that organise the available templates into logical groups. Clicking the Plus sign to the left of the folder will reveal the available templates in each group. When you click on a template the right hand part of the page becomes enabled with the settings for that particular template. This side of the window is divided into different tabs covering different area, some of which may not be relevant for every template. You can make changes to any enabled control and the changes will be applied when you close the window by using the OK button. If you have altered a template and do not like the effect, and you want to revert to the original settings you can do so by clicking the "Reset to Default Values" button on the "General" tab.

General

Hide this template in the Export Wizard

If this box is ticked the selected template will not appear in the export wizard and it will not be possible to export a document using it. You may want to do this if you never produce a particular type of template and want fewer items to choose from in the Export Wizard.

Make a Copy of this Template

This button allows you to make a copy of a template. You can then alter the settings of the copy whilst leaving the original template as is. When you click this button you will be prompted for a name for the template. The name must be unique and a suggested name is given, though you are free to use any unique name of your choosing.

Reset To Default Values

This button will remove any changes you have made to a template and return it to the state it was in when CostsMaster was first installed.

Delete Template

This will delete the selected template from your system. You can restore a deleted template (but with its default settings) on the Repair tab (see below).

Export Phrases

As well as the general export phrases, each template has its own set of export phrases. These can be used when you want a different phrase for a particular type of export (e.g. a different estimated time marker for a CLAIM1) or where you have a client who likes different wording, you can make a copy of a template and change the phrases to suit. Clicking this button will open the Export Phrases window.

Save Template As

This button allows you to save a template to a location on your hard disk or on the network. You can then give this template to a colleague or place it in a shared location for the use of others.

Import Template

This button allows you to import a template that another user has saved from their copy. When importing you can choose to place the template in the default location with your other export templates, or to put it in a another location such as a shared network drive.

Appearance

Default Font Name & Size

These controls allow you to alter the default font name and size. Please note this font will apply to the text of items recorded within CostsMaster and may not apply to some pre-set text and parts of forms which may have their text style hard coded.

Please bear in mind that not all fonts will display at the same width and height for a given font size. For example, Arial is a larger font then Times New Roman. Many bill templates default to using Times New Roman 12 point. If you change this to Arial we would recommend also changing the font size to 11 point which will give a similar size text and prevent large numbers from wrapping onto a second line.

Default Cell Padding

For templates that use a table structure to export, this setting determines the amount of space in centimetres that is allowed between text and the edge of the cell. Please be aware that increasing this value may result in certain text no longer fitting in a cell and wrapping to a second line as a result.

Form Protection / Form Shading

If the template represents a pre-printed form these controls will be enabled. If Form protection is ticked the pre-set text on a form will not be editable and the user will only be able to edit the text that would normally be added to a pre-printed form. With this box un-ticked all text on the form can be edited. If Form shading is ticked, the areas of a protected form that can be edited are shown in grey giving the user a visual indication of which areas of a protected form can be altered.

Please note that not all word processors may implement these functions. Furthermore these functions can also be enabled and disabled within your word processor.

Page Setup

Orientation

This determines whether the template is generated as portrait or landscape. Most forms assume a certain orientation and altering this setting will cause the form to export incorrectly.

Margins

These boxes allow you to specify the margins for the page and the header and footer. If reducing the margins you will probably have to alter the column positions as there will now be correspondingly less space on the page to fit everything in.

Columns & Lines

The controls on this tab apply only to columned bills.

Column Position Table

This table allows you to specify the position of the end of each column in a bill template. Should you need to alter a template to match pre-printed paper you can do so here.

Column headings can also be specified here. Should you want a heading to span two lines simply add "\par" (without the quotes - it is the standard RTF symbol for a paragraph).

Header Row Height

This is the height in centimetres of the header row of the exported bill which shows the names of the columns. This can be altered to match the position of the header on pre-printed paper.

Pence Column Width

This and the remaining controls on this tab apply only when the option in the bill settings window for advanced lines is selected. This setting specifies the width of the pence column and therefore the location at which the Advanced lines option will draw the dividing line between pounds and pence.

Double Line spacing

This is the (very small) gap between the double lines of the advanced lines option.

Header Line Top / Middle / Bottom

These values determine the position at which the advanced lines option draws horizontal lines for the header of the bill. The mid line value is used for templates which have a header row which is divided into two rows over the columns, usually where the columns are grouped into sections, such as legal aid & inter partes, or amount claimed and amount allowed.

Repair

This tab contains a button that will validate all installed templates and restore any CostsMaster-installed templates that you had previously deleted.

Chapter 8

Getting work in to (and out of) CostsMaster

Importing Work

 Shift + Alt + I

Whilst CostsMaster has a fast and efficient method that allows you to enter data quickly, if you have access to the data in a time recording system you may prefer to load that work into CostsMaster to form the basis of the exported bill or budget.

Alternatively, you may have work within a separate CostsMaster file that you want to import into your current file and merge with the data there.

The following pages explain how you can do both these things.

Importing Work from a CostsMaster File

In order to import work from a CostsMaster file it is only necessary to specify the file and choose which parts you wish to import in the Data Import Wizard. It isn't even necessary for the files to have the same basic setup - if the imported files have different fee earners, categories, Counsel or parties they will be created for you automatically during the import process. However if the work in the file being imported uses fee earners, Counsel, Categories or parties with the same name as the main file it will instead be reassigned to use the existing items so as to avoid duplication.

It is only possible to import an entire part into CostsMaster, and these parts will be added as additional parts in the main file. You can then choose whether to merge the parts with existing parts or leave them separate as you wish.

It is only possible to import work from files saved by CostsMaster 3 or later. If you have data in an earlier file that you wish to import you must first import it into the current version and save it. You can then import this saved version.

Importing Work from a Time Recording System

In order to import work from a time recording system you first need to get your time recording system to generate a file containing the work in a format that the data import wizard can handle. The most common format is an Excel file and most time recording systems can generate these. CostsMaster can also easily import data from CSV files.

It isn't necessary to have the columns in a particular format as CostsMaster allows you to map columns in your Excel file to fields in CostsMaster. However, the data within the file should be consistent within itself and with any data previously imported or entered into CostsMaster. For example, the description of any parts, parties, fee earners etc. should be identical to any already present in the CostsMaster file to enable CostsMaster to match them up. A full list of the fields which can be imported is contained in the Reference section on Import File Fields.

In the past, CostsMaster required the data to be in a specific format in either a CSV or XML file. If your time recording system has been configured to produce one of these files, then it can still be imported into CostsMaster, but these rigid formats are deprecated as they do not have access to all the fields that can be imported via the mapping window, and you may wish to consider using the mapping as an alternative if you need access to any of the more recently added fields.

Once you have the file you can import it using the Data Import Wizard. It then appears in the Pending Work window from where you can make changes and decide where it should be moved to within the program.

Work imported in this manner will still need the intervention of a draftsman, not least in the essential task of deciding which work is recoverable and where in the bill each type of work should appear. However, the import work function makes it easy to import data and move it to various locations within CostsMaster.

Data Import Wizard

Shift + Alt + I

Once you have a compatible file you are ready to run the Data Import Wizard. This wizard guides you through the steps to import work from a file generated by a case management or other system.

Select the type of file to import

You can choose to import data from an existing CostsMaster file or from a time recording system.

Select a file to import

Click the "select file" button and navigate to the folder on your computer that contains the file you wish to import. Unless the file is a time recording system file in the old rigid XML or CSV format, you will be taken to the Mapping window where you can either define a new mapping for the file or apply a pre-saved mapping. Please see the section on Import File Format Mapping for more information.

Once the mapping has been applied (or if your file is a old rigid XML or CSV file), the file will be validated and if it passes you will be taken to the next page.

Select Parts (CostsMaster files only)

When importing a CostsMaster file you can select which parts you wish to import.By default all parts are selected but you can de-select any that you do not wish to import.

By default Pending work from the file is not imported because it does not exist within a part. However if you wish to include such work there is an option to do so.

Assign Work to Parts (time recording system files only)

You can save yourself some time by creating any parts you know you will need and setting start and end dates for them. If the option to assign work to parts is selected the wizard will automatically set the Proposed Part to the appropriate part based on the date of each item. If you forget to create parts before starting the wizard you can still access the parts window from the button on the assignment page.

Furthermore, if the file being imported contains a part field, you can opt to have CostsMaster assign any work to an existing part where the description of that part matches the part field in the file.

Assign Work to Categories and Rates (time recording system files only)

If the information contained in the import file includes details of grades and rates CostsMaster can use this to create the appropriate Categories and Rates automatically.

Assign Work to Locations (time recording system files only)

If the imported file contains information about the CostsMaster location that it is destined for, the import wizard will automatically assign the item to that location. However, even if your imported file does not contain any location information, you can also get CostsMaster to guess the eventual location of work. It does this by looking for key words in either the Activity or Description columns in the imported work. The key words are defined in the presets window and can be altered and added to in order to improve the success rate. This option is only enabled if you have selected the option to Assign work to Parts on the previous page.

Assign work to Parties (time recording system files only)

If your imported file contains information about any parties on which an attendance was carried out, this will be utilised by the import wizard and the attendance will be assigned accordingly. In addition, you can opt to have the Import wizard automatically create any such parties if they do not already exist in the CostsMaster file.

However, if your imported file does not contain any party information,you can still have CostsMaster attempt to assign work against parties to an actual party. It will do this by looking for the name of each party you have created against the description of each item being imported. If you have not yet set up any parties you can do so now from the button on this window. As well as specifying the name of the party it is also possible to record aliases. These are also checked when assigning work on import so that if the party is referred to by different words ("Claimant", "Client" or "CLT" etc.) you can record these as aliases, separated by commas or other punctuation, and they will be detected and the correct party assigned.

Assign Phases Tasks and Activities to work

If the work being imported is not already tagged with phases or tasks & activities CostsMaster can attempt to do this automatically by matching the description of each item against the presets which you can customise for this purpose.

You can also choose whether these are assigned to all work or only to work which doesn't have a phase or task & activity already set and you can specify that tasks should not be set where they conflict with any phase information in the imported file.

If you choose not to apply these at this time you can do so later by running the Apply Phases/Tasks & Activities tool.

Import the work

Press finish and the work will be imported. Work from a time recording system will be displayed in the Pending Work Window, whilst parts from a CostsMaster file will be added after the existing parts in the main file.

Import File Format Mapping

The Import File Format Mapping window opens when, as part of the Import Work process, you select an Excel file or a CSV file that is not in the older prescribed format. This window allows you to specify which fields in the import file should be mapped to which fields in CostsMaster. Once done, this mapping can be saved for use in the future. If you have a mapping you have saved previously, you can apply it by selecting it from the saved mappings drop down box. You then only need to confirm that the settings are correct and the headings match the data, and you can then click OK and progress to the next part of the import process.

The rest of this page deals with the situation where you need to create a mapping for the first time.

Mapping an Import File to CostsMaster

The mapping is done via the grid at the bottom of the window. This will contain a few lines of data from the file you selected in the Import wizard. The first non-fixed row (or rows depending on type - see below), in red, contains a drop down box in each column containing a list of all the possible destination fields in CostsMaster. You simply need to select the field that best represents the data in the column below.

Mapping controls

Above the grid are several controls which may need to be altered depending on the type of file being imported:

Each Row Contains - A file being imported may contain attendances, disbursements or a combination of both. This control allows you to specify

- **Attendances -** each row contains an Attendance item.
- **Disbursements -** each row contains a Disbursement item.
- **Either -** each row can contain either an Attendance or a Disbursement item, according to whether "Type" is "A" or "D". With this option you will have two rows in red to select from, one for attendances and one for disbursements.
- **Composite -** each row can contain either or both types, depending upon whether there is data in "Time" or "Amount".

Selecting a new format after making any other changes will prompt CostsMaster to ask you if you want to save the changes.

Data Starts At Row - If your file contains headings or a description at the beginning, this control allows you to skip them. It is important that you use this to specify the first row that contains data, otherwise the import process will probably fail where, for example, the program tries to convert the heading of the time column to a number.

Additional Columns as Notes - if you are not importing all columns (i.e. if some of the column headings do not have CM fields defined), you can use this option to retain the additional data as notes attached to the imported items. If this option is not selected these extra columns are discarded.

Comment prefix - A row in a file may be a comment which is data that is not intended to be imported. Such a file has an identifying character at the beginning, which is commonly "C": the default is blank, but that can be altered here.

In the Time column Assume Whole Numbers are - CostsMaster will attempt to interpret time values according to the formatting - values with a decimal point will be seen as fractional hours and values with a colon as hours and minutes - but whole numbers are ambiguous. This setting determines if they will be seen as hours, minutes or units. In the last case, a further box is enabled where you can specify how many minutes are in a unit.

Saving the Mappings

This section of the window allows you to save your information for use in future. The drop-down box contains a list of all mappings you have previously saved and allows you to quickly choose which mapping to work with for a particular import file.

The **Save** button will save any changes to the current mapping, whereas the **Save As...** button will allow you to save the current settings under a new name (or replace an existing mapping). We recommend you give the mapping a name that clearly identifies its purpose so it can be recalled easily later. Should you want to remove an entry you can do so with the **Delete** button.

If you tend to use one particular mapping most of the time you can use the **Make Default** button to specify it as the default, meaning it will be selected automatically when this window is opened. The facility to select the default is duplicated in Local Settings. If you want to change the default, simply select a new item and make that default. If you no longer want a default at all, you can delete the default from the Local Settings window.

You can transfer saved mappings to or from a colleague: the **Transfer to/ from External File...** button will open the Transfer Mappings window.

Transfer Mappings

To exchange mappings with colleagues, it is necessary to transfer them between CostsMaster's internal list and an external file.

My Mappings

The left-hand list is for the current set of mappings, and is filled by clicking the **Load** button underneath. Multiple items can be selected using Ctrl-click and Shift-click as elsewhere. The **Delete Selected** button will remove the selected items from the list, which can be restored using the Load button until the window is closed or the **Save** button used to confirm changes.

The **COPY -->>** button will copy selected items to the right-hand list.

File Mappings

The right-hand list is used for an external file. The **Load** button will allow you to load items from an existing file: the name of the file will be displayed at the top of the window. The **Save** and **Save As...** buttons allow you to save your chosen items to a new file or update an existing file. Again the **Delete Selected** button will remove the selected items from the list.

The **COPY <<--** button will copy selected items to the left-hand list.

Pending Work Window

Shift + Alt + W

The pending work window is used mostly when importing work from an external system. However you can also use it to record attendances and disbursements that you want recorded but do not yet want to include in the bill. When importing work you may want to alter it in the Pending Work window before moving it to other locations within CostsMaster.

Altering Imported work

When you import work from an external time recording system you will almost certainly have to make changes to it, whether to expand on the description given or to set different properties for the items. You can make such changes in the Pending Work window which gives full access to all fields of the attendance or disbursement either directly in the grid or via the edit window. Alternatively, you may want to send items to their ultimate destinations (see below) and make changes there.

Splitting Imported Work

In some cases you may find you have a single item which needs to be sent to multiple locations. You can split this item quickly via the Edit Pending Attendance or Edit Pending Disbursement windows. For attendances simply click the "Split" button at the bottom of the edit window and enter a description and time in the window that appears. For disbursements select the "Split Work" section and enter the description and amount.

You can also assign the sub item to a part, location and party. There are drop down options for items already created but if you type in the name of a different part or party it will ultimately be created for you.

The sub item will be listed in the box to the bottom left of the window and any time entered for the sub item will automatically be deducted from the main item. If you select part of the description text before clicking the Split button, this will be placed as the text for the sub item and automatically removed from the description afterwards.

If you change your mind about a sub item you can edit it or even delete it. Any changes to the time are reflected in the time for the main pending attendance, so if you delete an item its time is returned to the main attendance. *Please note that if you created the sub-item by selecting part of the attendance description this selected text will have been removed from the description but cannot be re-instated when the sub-item is deleted.*

When you close the Edit Pending Attendance window new items will be created for all the sub items. You can then assign locations to these as described below.

Resolving Negative Time

In CostsMaster it is not possible to record negative time for an attendance - this generally would not make any sense in a bill of costs. However, when importing time, it is quite common to encounter negative time entries where they have been created to reduce or negate a previous entry. Such entries cannot be moved into CostsMaster and must be dealt with in the Pending Work Window where the time element is shown in red.

Items can be adjusted manually but CostsMaster also provides a button to assist with the process. The button is at the top of the window and is labelled "Resolve Negative Time". By default it is disabled but becomes enabled when two items (but no more) are selected and one of those items has negative time. Clicking this button will subtract the negative time from the positive. In addition, there is an option in Local Settings labelled "When resolving negative time automatically remove entries that are reduced to zero". If selected then any entries that get reduced to zero by this process are automatically deleted.

Moving items to different locations within CostsMaster

Any work recorded in this window will not appear in an exported bill until it is moved to another location in CostsMaster. You can think of this window as a holding area for work. All the work in this window has an extra three fields for Proposed Part, Proposed Location and Proposed Party. You can specify some or all of these fields and then click the "Move items to location" button, copy and paste items to their desired location or even drag them from here to the desired location. As using the "Move items to location" button is probably the quickest method (and the other methods are covered elsewhere in this guide) we will focus on that here.

The pending work window can show both attendances and disbursements. At the top left of a window is a selection switch that changes between these two views. To the right of this are two buttons to create new parts or parties, something you might like to do as you work through the items in this window.

To move work to its correct location you need to specify at the least the Proposed Location. This must be selected from the drop down box.

If the Proposed Part is not completed the item will be moved only if there is one part or if there are no parts (in which case a part will automatically be created). The proposed part can be selected from the drop down box or can be typed in. If the text typed in does not match an existing part a new part will be created.

The Proposed Party need only be completed if the location relates to a party. This can be selected from the drop down list or can be typed in. Again, if the text typed in is not an existing party a new party will be created.

You can specify these locations in three ways:

1. Select the items you want to change, complete the boxes at the bottom of the screen, then click "Apply to selected items". The selected items now show the proposed part, location and party specified below.
2. With the grid not in multi-select mode choose the values for each item from the drop down boxes.
3. Select the items you want to change, then click the edit button and change the values in the Edit Pending Work window.

Of course there is a fourth and that is to get the program to assign the part and location for you during the import process as mentioned in the section on the Data Import Wizard.

Once you have specified sufficient locations you can click on the "Move items to Location" button. The button to left of this toggles the function between moving all items and moving only selected items. When the button is clicked any items that have sufficient information in the proposed fields will be moved. Anything that has insufficient information, e.g. because you have specified a party location but not a party) will remain for you to attend to.

There is a further option to combine identical routine items into a single block of attendances, so for example, if the data you were importing had six separate 6 minute telephone calls to the client they would usually be imported as six separate attendances but ticking this box would create a single entry with a value of 6 items. Routine items can always be split and combined later should you want to do so.

Returning work to the Pending Work window

Sometimes, you might feel the need to return some work to the pending work window in order to re-process it afresh. This can be done on for individual items by selecting them, right clicking and selecting Move To > Pending Work. There is also an entry on the Tools menu that will return work to the pending work window. Clicking this opens a window where you can select the parts, parties and type of work you want to move. By default everything is selected which will move all work back to Pending, but you can deselect items to only move certain items if you wish.

Outputting Work

Shift + Alt + O

As well as importing work, it is also possible to output work to an external file for loading into other systems. At present work output in this manner uses the same data format as is used for importing data from a time recording system. This format is fairly basic and does not contain all the information recorded within CostsMaster.

The output work function will involve the CostsMaster Data Output wizard. This wizard gives you the option of selecting which parts you wish to output and to choose a name for the file. The file will then be written in XML format only.

It is not necessary to output work if you only need it to be imported to a different CostsMaster file, as you can import parts from a CostsMaster file directly.

XML Totals

As well as outputting work from CostsMaster it is also possible to generate an XML file alongside a bill that contains the totals from that bill. These can be loaded into your case management system for billing or analytical purposes.

Totals can be generated for bills, breakdowns, CLAIM1s and case plans. All that is needed is to tick the appropriate box in the Export Wizard and the totals file will be generated in the same folder as the bill.

Full details of the fields that are output can be found in the reference section.

Chapter 9

Customising CostsMaster

Local Settings

Introduction

The Local Settings window contains options that affect the way you use CostsMaster. There are a number of individual pages accessible by clicking an item in the list on the left of the screen.

General

No of file names in recent list

This governs the number of items that appear in the list of recently opened files in the file menu. The default is 10.

Show Full path for items in recent list

By default the list of recently opened files shows only the file name part and not the full location. When this option is ticked the full location is shown. This makes the items much longer but is necessary if you need to distinguish between similarly named items in different locations.

Always Show Control Centre

When ticked the control centre is always shown when CostsMaster starts. If it is unticked you can view the control centre by clicking the "Control Centre" menu item on the File Menu.

Show Fee Earners With No Work in Colour

When ticked this option will show any fee earners that have no work recorded against them in a different colour.

Show Procedural Steps In Colour

When ticked procedural steps will be shown in different colours according to the type of procedural step. This makes it easy to see the type of step at a glance if the type column is hidden.

Please see the section on Procedural Steps for details of the colours used.

Lock Open Files

When ticked any file open in CostsMaster will be locked at the file system level preventing anyone else opening the file and making changes which would cause one or other user to lose data.

Automatically re-size windows when grid widths change

When re-sizing columns or making columns visible or hidden, if this option is selected the window will adjust in size to accommodate the widths of the grid. If this option is not selected you will have to adjust the window size manually.

Show property icons in columns

By default any property icons that are set are displayed in the properties column one after the other. If this option is set, properties of the same type are aligned underneath each other. This makes it easier to see which properties are set but the properties column must be larger to accommodate them.

Use Extended Shortcuts

Because there are so many features in CostsMaster it is not possible to access them all via shortcuts in the normal manner. For this reason, when this option is selected the left and right shift keys are considered independently when identifying shortcuts. When it is not selected the left and right shift and control keys are considered equivalent and any shortcuts that utilise the right keys will be unavailable.

Hide Zero Values in Grid

This option lets you choose whether zero values in grids are displayed as numbers or as blanks.

Show Hints for Menu Items

When this option is enabled, hovering over a menu item will display a hint with further information.

Assume whole numbers are

This setting determines how the program interprets whole numbers entered into a time/items column. The options are for hours, minutes or units and if the latter is selected you can define how many minutes make up a unit.

This only affects the way numbers are entered. Time is always displayed as hh:mm.

Personal

This page has information relating to the company or firm whose costs are being claimed.

The Draftsman is VAT Registered box determines whether VAT is claimed on the Costs Draftsman's fee when calculated at a percentage. It applies only when claiming the Costs Draftsman's fee as a disbursement. If claimed as a profit cost (either lump sum or pseudo-hourly rate) then VAT is always claimed at the part VAT rate.

Safety

Automatically save files

If this box is checked CostsMaster will automatically save your file (if it has changed) every so often. You can also define how frequently this takes place.

Show Message When Auto saving

Additionally CostsMaster can advise you when auto saves happen so that you can mark the place in the file. In the event that your computer crashes before the next save you will then know where to start re-costing the file from.

Give Audible Warning When Auto saving

As well as displaying the message when auto saving, the program can produce an audible warning. This is particularly useful for people who look at the keyboard when they type as it is very easy for such people to accidentally dismiss the auto save notification and to thereafter accidentally overwrite data.

Commit Data prior to auto save

Usually data in the control in which you are typing is saved to memory only when you leave that control. With this option selected the data in the control you are working in is committed to memory just before the auto save takes place. This means that the data saved is right up to the minute. However it results in the program refreshing its windows which can cause the data to become selected and then accidentally deleted by the next keystroke. (hitting the ESC key or Ctrl + Z BEFORE leaving the control restores the accidentally deleted text!).

When saving keep this many old files

When a file is saved CostsMaster additionally keeps old copies. CostsMaster files have a .cm3 extension and backups are given a .c01 etc. extension. This setting determines how many backups to keep. This is a useful safety device if you find you make a mistake when costing a file and need to go back to a point before the error occurred. Backup copies are stored in the Backup files folder which is defined in the File Locationspage

To facilitate this you may find it useful to mark your file with the time a save takes place (whether it is a manual save or an auto save). If you do need to revert to an earlier save you can then locate the point on the file that has the same time as the backup file you have reverted to.

For details on opening backup files please see the section on Opening Files.

Verify Saved Files

When ticked CostsMaster will verify that the file it has saved exists on disk and that it is the correct size.

Enable History (Undo/Redo)

When ticked the program records a History of all actions performed by the user together with sufficient data to allow the action to be undone at a later date. In large files this feature can cause the program to become sluggish. If this affects you you can disable the history by unticking this box.

File Locations

This page lets you specify the default location for the different types of files you use in CostsMaster. Changing any of these items changes the location for future use but does not move any files stored in the old location to the new location. If you wish to do this you should do so yourself using My Computer or similar.

As well as specifying the absolute file location, it is also possible to use Windows environment variables, such as %APPDATA% to define a path in a common way that may actually vary between different users.

These settings are stored in a separate file to the remainder of the local settings, in order to make it easier to share settings between users where the file locations should not change.

CostsMaster Files (.cm3)

This is the default location for the files containing the information you have input into CostsMaster. By default it is <My Documents>\CostsMaster Files\

Exported Documents (.rtf)

CostsMaster 3 and later exports documents differently to previous versions. Instead of putting the data directly into Word the program saves the file in a format that should be readable by many word processors and then optionally opens the file in the word processor of your choice. This setting determines the location that these files are saved to.

You can specify that the file will be saved to the same location as the CostsMaster file or you can have it save into a specific folder.

Backup Files (.c01 etc.)

Previous versions of CostsMaster saved backup files in the same location as the original file but from version 3 they are saved into their own backups folder. The default is <My Documents>\CostsMaster Files\Backups\

Program Templates

These are part completed bills that you can use to avoid completing the same tasks you do every time you start a bill. The default is <My Documents>\CostsMaster Files\Program Templates\

Enhancement

X in an enhancement box sets exclude to

In any enhancement column you can exclude enhancement by typing an "X" as an alternative to entering the Enhancement Set-up Window and setting the exclude value manually. As you will see from that window there are four options in the exclude box, and this setting determines which of the two negative options are applied when you type "x", "Yes" or "Always".

Dates

Dates entered without years...

When entering a date without a year CostsMaster will attempt to guess the year. It does this by checking the previous date entered and using the year from that if it will make a date that is in advance of the previous date, otherwise it adds to the year. However not all files are in strict date order and entering a date that is a few days before the previous one would result in CostsMaster guessing that it was a year later than it was. Therefore the program uses the date window specified here and will assume the current year if the resulting date falls within the number of days specified.

Date Separators

This box allows you to specify the characters that can be used to separate the elements of a date. By default CostsMaster lets you use the forward slash, full stop or colon but you can define any characters you want to use here.

More importantly, you may want to remove characters such as the full stop or colon if you are entering text in a date field and want to use these characters as part of a date. If you do not do so, CostsMaster will probably misinterpret the information you have entered.

Prevent text being entered in date columns

This option, when selected, will prohibit the entry of any characters other than numbers and date separators in a date field. You may however want to turn this option off should you want to enter text in dates such as "around Dec 2012" or even "various".

Warn when text is typed instead of a date

When this option is selected and you type an alphabetic character, you will receive a warning to this effect. This is useful if you tend to look at the keyboard when you type as it is quite easy to type the description to an attendance whilst the cursor is in the date column. The option below specifies the way the warning will occur.

Warn when a date is not chronological

When this option is selected, you will receive a warning if the date is later than the first dated item after the item or earlier than the first dated item before it.

Warn when a date is incomplete

Whilst CostsMaster allows partial dates to be entered in the date column, you may want to ensure that only whole dates are entered. This option will generate a warning whenever an entry that this not a complete date is entered. This function is applied after CostsMaster has guessed any missing elements, so it doesn't preclude you from, say, omitting the year and letting CostsMaster guess it.

Warn when a date is entered that is outside the start and end dates for the part.

This function used to be applied automatically whenever a start date or end date were recorded, but some people needed to record start and end dates but didn't want to be warned when a date fell outside. Unticking this option will suppress any such warning messages.

When you need to be warned about an invalid entry...

If you type text in a date column or if you have specified start and end dates for a part and you then type a date outside that range, the program will warn you of this fact. Here you can choose how you want to be warned, either by message, by making a sound or both.

When changing the date of a procedural step...

When the date of a procedural step is changed CostsMaster can change the date of its attendances to match. You can chose to

- Never change dates (you can still do so manually if you wish)
- Have CostsMaster ask whether you want to change the dates (including whether to change dates of all attendances or only those that had the same date as the procedural step)
- Automatically change dates if they were the same as the procedural step and ask about any others
- Automatically change dates if they were the same as the procedural step and ignore any others
- Automatically change all dates.

Currency

Current VAT Rate

This is the default value that is used for bill VAT when starting a new bill. Changing this has no effect on existing files - you must change the VAT figure within the Edit Bill Window or the Edit Part Window.

Rounding Method

Please see the section on rounding for further details.

Round Rates to 2 Decimal Places

This option allows you to specify whether the figures that are entered into the rates window are rounded to 2 decimal places. For rates that are to the nearest pound this has no effect but if you had a rate of, say, £175.76, this option would allow you to enter £17.576 for the telephone calls without it automatically being rounded to £17.58. The unrounded figures will be used by electronic bills but some other bills may still round the figures when exporting.

Currency Symbol

This determines the symbol used by CostsMaster with currency amounts within the program. It defaults to "£".

Auto-Insert Text

Mileage Rate

This box lets you specify the mileage rate (in pence per mile) that is used to create a disbursement claiming mileage allowance simply by typing the miles travelled in the description column of a disbursement and using the Shift + Enter shortcut. Only numbers are allowed (with no pound signs etc.)

Please note that whereas in CostsMaster 2 this value was displayed as a fraction of a pound, in this version it is displayed as pence only.

Mileage Description

When using the mileage shortcut described above CostsMaster will use the text entered here to construct a phrase that will be inserted into the disbursement description column. If you use the special characters ^1 and ^2 in the phrase they will be replaced by the miles travelled and the mileage rate respectively. The default description is

```
Paid travel expenses (^1 miles at ^2 pence per mile)
```

If the Mileage rate is 36 pence per mile and 26 miles are claimed the resulting description will be

```
Paid travel expenses (26 miles at 36 pence per mile)
```

Document Tag Type

There is a similar feature activated by the same Shift + Enter shortcut in the description column of the attendances and disbursements grid. This lets you insert a tag into the description that can refer to a flag placed on a physical document. This setting determines the type of that flag. The options are

- Lower case Roman numeral (i, ii, iii)
- Upper case Roman numeral (I, II, III)
- Numerical (1, 2, 3)
- Lower case alphabetic (a, b, c....aa, ab etc.)
- Upper case alphabetic (A, B, C....AA, AB etc.)
- Mixed case alphabetic (A, B, C....a, b, c....Aa, Ab etc.)

Document Tag Description

When the above shortcut is used CostsMaster will use the text entered here to construct a phrase that will be inserted into the description column. If you use the special character ^1 in the phrase it will be replaced by the actual tag.

The default description is

```
(^1)
```

Which results in the tag appearing in parenthesis:

```
(iv)
```

Please see the section on Auto-Insert Text for more information.

Next Tag

The value of the next tag to be used can be set here - useful if you added an item by mistake, or you want the numberingto carry on from a previous bill.

document tag

Enter topic text here.

Sounds

Other sound related settings can be found in the Safety and Dates sections

Play audible warnings as

CostsMaster can give audible warnings when you might need to look up from your work, such as when autosaving a file or when you type alphabetic text into a date column. This setting determines whether those sounds are played via your soundcard and speakers or via the small speaker that is fitted to your PC case and can be made to beep.

Each has its drawbacks. When using your soundcard you must obviously have your speakers turned on but despite this this is the recommended option as the beep functionality is being phased out from Windows and recent versions do not support it.

Give audible acknowledgment recording telephone calls etc. by keyboard

When ticked this causes the program to alert you when a telephone call, letter out, email out or letter in is recorded using the keyboard shortcuts. Each shortcut generates a sound of a different pitch which makes it easier to confirm that the item has been recorded and you haven't hit an incorrect key by mistake.

Spelling

Live spelling check in grids and text boxes

When ticked the grids will underline any mis-spelt words as they are typed without need to do a full spelling check.

Full Spelling check options

When performing a full spelling check (from the tools menu) you can use these boxes to specify which parts of the file CostsMaster does not check. Available options are:

- Case Details
- Fee Earners and Counsel
- Categories
- Costs Budget
- Notes
- Pending Work
- Parties
- Excluded Items

By default, the first two options are set to "no"; the rest are all set to "yes".

Spelling Options

Opens the Spelling Options Window

Spelling Options

These options are accessed from the "Spelling" page of the Local Settings Window.

Spelling

Show spelling errors as you type

Enables live spelling in grids and principal text entry boxes such as the narrative window, by underlining mis-spelled words with a red line.

Automatically correct spelling errors as you type

Enables the auto correction of mis-spelled words found in your Auto-Correct list (see below)

Automatically correct dual capitals

Automatically corrects the second character of a word to lower case where the first two characters are in upper case.

Flag repeated words when checking spelling

Causes words repeated twice to be flagged even if they are correctly spelt.

Capitalise the first letter of a sentence

Causes the first letter of a sentence to always be in upper case.

When Checking Spelling Ignore...

These options allow you to specify types of mis-spelled words that you don't want flagged including:

- words in upper case
- words containing numbers
- markup languages (HTML, XML etc.)
- Internet addresses
- Abbreviations
- Lines beginning with any character specified by you.

Language

Language Settings

Allows you to specify the language used for Spelling checks. By default only the British dictionary is installed with CostsMaster.

Additional Dictionaries

This lists any additional dictionaries on your computer that can be utilised, such as Word custom dictionaries (dictionaries containing words you have added within Word or other Microsoft programs). If you have other dictionaries you want to use you can locate them by clicking the "Locate Dictionaries" button and browsing your hard drive for their whereabouts.

Custom Dictionary

The custom dictionary is where words you have added during a spelling check are stored. The default custom dictionary is called cmuser.adu but you can create additional dictionaries should you want to. This dictionary is stored within your Windows profile and is specific to you even on multi-user systems. Even so, should you wish to create a specific dictionary for certain files where, say, you encounter a large amount of specific technical jargon, you can do so here.

Adds

These are the words you have added to your custom dictionary. You can add further words here or delete any words added in error.

Auto-Corrections

These are the word replacement pairs that will be automatically corrected if the option to do so is selected (see earlier on this page). This is the place to list words you commonly mis-spell (such as *accomodate* instead of *accommodate*.) Here you can create new entries or delete any you no longer want included.

Exclusions

These are words that you do not want flagged as misspelled.

Fonts

This page lets you specify the font used for the narrative window and the font and colours for grids.

The changes made here will apply to all grids although each grid has the option to override these settings and use its own font and colour.

Export Tools

CostsMaster gives you the option of running a selection of tools automatically before every export. Simply select the tools you want to run here.

Available options are the Spelling Check and the various Searches.

Export Viewers

CostsMaster allows you to specify which applications are used to view different types of documents once you have exported them.

CostsMaster exports word processor documents in Rich Text Format (RTF), an open format designed for the exchange of word processing data between systems. The RTF specification was developed by Microsoft and accordingly it is best supported by Microsoft Word. Other word processors, such as Open Office Writer, can read RTF documents with only minor issues but others have limitations which make the complex documents produced by CostsMaster impossible to view.

CostsMaster generally requires the full version of Word to be installed on you computer as the online version does not support opening RTF documents. However, at the time of writing there is a workaround of renaming the .rtf extension to .doc which will fool the online version into opening the RTF document. If you need to try this there is an option to export the RTF file with the .doc extension. Please note that this is a simple renaming of the extension and the file remains a RTF document rather than a standard Word document.

CostsMaster exports spreadsheet documents in Excel Format (XLS), a format used by Microsoft Excel. It can also be opened and edited with Open Office.

Either of these can also be exported in PDF format, which are read-only, and can be opened with any PDF viewer.

For each type of document (Word Processor, PDF and Spreadsheet) you have the option to use whatever default application you already have defined or to choose a specific application for files exported from CostsMaster.

Hints

When hovering the mouse over columns and data CostsMaster often shows a hint explaining the purpose of the item or showing the complete text where there is insufficient space in a column etc. These options cover how those hints are displayed.

Here you can turn off the display of hints altogether as well as specifying the time (in milliseconds) you have to hold the mouse over an area before a hint appears and the time it remains on screen.

Import & Output

When resolving negative time automatically remove entries that are reduced to zero

It is not possible to record negative time in CostsMaster but when importing work from a time recording system such entries are often encountered where they are often used to correct or negate a previous entry. When such entries are found the user can utilise functions in the Pending Work window which automatically deduct negative time from an associated entry. When this is done and the items are reduced to zero, if this option is selected then the items will be deleted automatically, otherwise they must be deleted manually.

Include Header In CSV Grid Exports

When selected the exported CSV file for a grid will contain the column names as the first line.

Import File Mapping

You can choose a default File Mapping to use when importing data from an external file, or manage the available mappings.

Phase, Task & Activity

Show Costs Budget percentages as

This option allows you to specify whether the background colour of a cell in the Costs Budgets window shows a colour. Three options are available:

- No Colour
- Solid colours - the background colour changes abruptly when the percentage value exceeds the threshold
- Gradients - the background colour changes gradually over the range of percentage values. This gives a visual indication of how far over budget a particular phase is.

Show Extended List of Activities and Expenses

By default CostsMaster only shows the most commonly used activities and expenses in the drop down boxes for these fields. When this option is selected all activities and expenses are shown.

List Activities In Old Order

Be default, when showing New Bill Phase, tasks & Activities, CostsMaster now lists activities in drop down boxes in the order of the New Bill Activity code (A1, A2 etc.) Previously, they were listed in the following order:

- Plan, Prepare, Draft, Review
- Manage Data/Files/Documentation
- Appear For/Attend
- Billable Travel Time
- Communicate (with client)
- Communicate (Other Party(s)/other outside lawyers)
- Communicate (witnesses)
- Communicate (Experts)
- Communicate (with outside Counsel)
- Communicate (internally within legal team)
- Communicate (other external)
- Other
- Research
- Draft/Revise
- Review/Analyse

If you were used to the old order and prefer it to the code order, this option will restore it.

Show Trial Preparation Phase Before Trial In Drop Down Lists

If you like to make your selection from drop down lists by typing the first few characters of the name, you will have noticed that it is not possible to select the Trial phase in this way because the Trial Preparation phase always gets selected first. This option reorders them in the list which allows you to use the keyboard to select either.

When changing the phase, task or activity of a party or procedural step...

When the phase, task or activity of a party or procedural step is changed CostsMaster can change the values of its attendances and disbursements to match. You can chose to

- Never change values (you can still do so manually if you wish)
- Have CostsMaster ask whether you want to change the values (including whether to change Values of all attendances & disbursements or only those that had the same value as the party or procedural step)
- Automatically change values if they were the same as the party or procedural step and ask about any others
- Automatically change values if they were the same as the party or procedural step and ignore any others
- Automatically change all values.

Parties

When changing the N260 Party field of a party...

When the N260 party field of a party is changed CostsMaster can change the N260 Party field of its attendances to match. You can chose to

- Never change values (you can still do so manually if you wish)
- Have CostsMaster ask whether you want to change the values (including whether to change values of all attendances or only those that had the same value as the party)
- Automatically change values if they were the same as the party and ask about any others
- Automatically change values if they were the same as the party and ignore any others
- Automatically change all values.

Pending Work

Set Multi-select on Open

When selected, the pending work window is automatically put into multi-select mode when it is opened. This mode is suitable for dealing with multiple items at once but does not allow editing of individual items in the grids.

This setting simply determines the default behaviour - as with all grids it is possible to alter the multi-select mode at any time by clicking the multi-select button on the grid toolbar.

Use Party Shortcuts to set proposed parties

With this option selected it is possible to apply parties in the pending work window using any F-key shortcuts you have set up for them. The downside is that when this is set, it is not possible to access the parties using the F-keys whilst the pending work window is active.

Use Routine shortcuts to enter routines

With this option selected you can use the shortcuts from the party details window to enter routine items.

If the selected item has the appropriate proposed location (eg PartyWorkStandardTCs for the Ctrl+"T" key) then the time value is increased by 6 minutes.
or
If there is an item with the appropriate proposed location, and the proposed party, part and phase are unassigned then the time value is increased by 6 minutes.
or
A new item is added, the proposed location is set and the time is set to 6 minutes.

If the Shift key is also down then the time is reduced by 6 minutes instead (not below zero!).

Other Settings

Presets

CostsMaster allows you to record presets for various items within the program where you want to select items from a drop down list rather than re-type them every time. In the presets window the various sections are listed on the left. Selecting one will reveal the list of presets for that section with,t o the right of that, the available fields that can be defined. Some presets are supplied with CostsMaster but you can add, delete and alter them as follows using the buttons above the list of presets as follows:

Add a new item at the end of the list.

Insert a new item at the current selection.

Make a copy of the currently selected preset. You will be given the option to name the copy but it will default to "Copy of " plus the name of the original preset.

Move the currently selected item up.

Move the currently selected item down.

Delete the currently selected preset.

Import a previously saved set of presets. You are given the choice of which presets within the file you want to import.

Save one or more presets to a file for reuse on another system. You can choose which of the presets within the curtrent section you wish to save to the file.

Presets can be defined for the following sections:

Attendances

These can be used in any attendance grid.

Disbursements

These presets are available in the description to every disbursement grid and in the edit disbursements window.

Categories

These presets can be selected from the description field in the Categories window by using the Alt + Down Arrow shortcut as well as from the Category field of the Fee Earners Window. You can specify all three descriptions plus whether the category is legal aid or inter partes.

Fee Earners

These presets can be selected from the description field in the Fee Earners window by using the Alt + Down Arrow shortcut.

Counsel

These presets can be selected from the description field in the Counsel window by using the Alt + Down Arrow shortcut.

Rates

These preset rates can be applied in either the Rates Window or the Part Rates Window.

Parties

These presets are available for the description in the party grid and in the edit party window.

Party Status

These presets are available to describe the status of parties to the action.

Case Types

These presets can be used on CLAIM1s and Case Plans where the type of case is required. The presets are available from the Case Type box in the Case Details window.

Notice of Commencement

These preset fees can be used when creating Notices of Commencement of Detailed Assessment.

Attendance / Disbursement Locations

These presets are used when guessing the ultimate destination of imported work. You can create name/value combinations that will help you to improve the accuracy of this function when importing work.

Disbursement Types

These presets are intended for inter partes costs where the specialism is not an exact match for one of the standard Legal Aid disbursement types. The presets get added to the list of Legal Aid disbursement types but will not show if CostsMaster is showing only Legal Aid work as the disbursement type for Legal Aid work must be one of the Legal Aid specified values.

Phases, Tasks & Activities

These presets are used when applying phases, tasks, activities and expenses to work using the tool provided for that purpose, when importing work or when no default is defined. You can add additional words to help improve the accuracy of the matching process when importing work or running the auto-apply tool.

By default, Phases, tasks and activities are set automatically but you can turn this off by unticking the relevant box here.

For activities and expenses, it should be noted that the text that appears in the preset drop down sometimes varies according to the type of phase, task and activity that are currently showing (as specified in the Control Centre). E.g. in J-Codes mode there are separate entries for "Plan and prepare for" and "Draft/Revise" but in New Bill Codes mode there is just a single entry for "Plan Prepare Draft, Review".

In New Bill Codes mode, the entries show the New Bill codes with the J-Code equivalent in brackets. Following these are the J-Code entries that do not have a New Bill equivalent. They are included so that you can create presets that will work in either mode. If one of these is matched in New Bill mode, the equivalent New Bill Activity will be mapped to it.

In addition, there is an option in the Local Settings window to show the Extended list of J-Codes. If this is selected then US specific codes are also included.

For Activities, it is also possible to specify the default value that will be used if no other match is found. This can be specified separately for Procedural Steps, Documents and Travelling & Waiting.

CLAIM1A Fees

These presets are used to select the correct fee when the relevant factors are changed on the Legal Aid Claim Settings window.

FAS Fees

These presets are used to calculate the correct fee when the relevant information is entered into the Edit FAS window.

Events Fees

These presets are used to select the correct fee when the relevant factors are entered into the Case Plan Settings window.

Abbreviations

 Alt + Shift + A

The abbreviations window is where you define abbreviations and legal aid codes.

Buttons on the bottom of the window allow you to add, edit or delete an item. It is also possible to generate a list of items for reference purposes in RTF, PDF or XLSX format.

Abbreviations

Abbreviations are where you specify short phrases that you want CostsMaster to automatically extend to a lengthier piece of text. For further information on the use of abbreviations please see the section on using abbreviations.

Legal Aid Codes

Legal aid codes are like abbreviations, except you are limited to the preset codes. However you can specify the lengthier text that should appear when you type the code into a description

Auto Codes

When typing a description in an attendance CostsMaster will attempt to guess the appropriate legal aid activity for the attendance. It does this based on lists of key words with associated activities. If CostsMaster finds one of the key words in the description it will automatically apply the associated activity to the attendance. Once the activity has been set the program will not attempt to change it should you alter the description.

There are separate lists of activities for Procedural Steps attendances, Party Attendances and a general list for other uses.

It is permissible for more than one word to be assigned to the same activity. Indeed, as with abbreviations, this is necessary in order to deal with variations of a word. If your description contains more than one keyword CostsMaster will use the first keyword found.

If you wish to use the CLAIM1/CLAIM1A codes instead of selecting the activity from the drop down box, you can simply type the code in the description and CostsMaster will automatically select an appropriate activity for you.

In addition there is an option in the Control Centre called "expand legal aid codes in descriptions". If this is selected, CostsMaster will replace the removed code with its expanded text; otherwise it will simply remove the code.

Auto Info

When setting a legal aid code CostsMaster can also attempt to determine whether the additional info property for the attendance should also be set. It does this based on a list of codes in the Auto Info section and the setting of the Control Centre option "Set Additional Info...". If this is set to "Automatically by code", then if the code you have set is one of those listed here the additional info property will be set. Once set the program will not then attempt to alter this should you change the code.

Main Toolbar

The toolbar on the main CostsMaster window is made up of several separate toolbars each corresponding to an entry on the main menu.

Repositioning toolbars

By clicking and dragging the toolbar at its extreme left hand edge it is possible to reorder its position within the toolbar area. When dragging within the toolbar area you can stack the toolbars on multiple lines by dragging the toolbar up or down as you move it.

Toolbar Settings


Alt + Shift + T

The toolbar settings window allows you to specify which toolbars appear on the main toolbar and which buttons are visible on each. There are also some general options that apply to all toolbars.

Button Size

You can specify whether buttons are shown with small, medium of large icons.

Auto Arrange Buttons

When you have more buttons visible than can be shown on screen you can access the additional buttons via the pop out on the right of the toolbar. When this option is selected any buttons selected in this way will appear on the main toolbar in place of any that are little used.

Show Captions for Toolbars

When this option is ticked a title appears above each toolbar explaining its purpose.

Show Captions for buttons

When ticked this option causes the buttons on the main toolbar to display text that explains its purpose. This can be useful whilst you are getting familiar with the program but it does cause fewer buttons to appear in a given space and you may need to increase the size of the Main window or drag some of the toolbars to a lower level in order to see everything.

Toolbars

The sections other than "General" each relate to a toolbar. There is a toolbar corresponding to each main menu heading and each entry on a menu also has a button. Many of these are hidden by default but on each page you can specify whether the toolbar is visible and choose which buttons are visible on each.

Profiles

By default CostsMaster settings are saved in a single file on your hard drive. However CostsMaster also gives you the opportunity to create additional option sets that can hold alternative settings that can be used in different situations. These are called profiles.

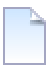
Profiles can be created, copied, deleted and applied in the Profiles Manager window.

A new profile is applied from the drop down box at the top of the window. The new profile will be applied when you close the Profiles manager. Applying a new profile will cause all your current settings, window positions, grid settings etc. to be replaced with the values from the new profile. As a result you may see some windows "jump" to their new positions whilst others will be closed beforehand. The safety settings will be changed also and it is recommended that you check these to make sure that backups are being saved at a suitable frequency.

Below this are a range of controls for managing your profiles.

Any profiles you have defined will appear in the list on the left. For each profile you can specify the name (which must be unique but CostsMaster will take care of this for you if you wish) and an optional description.

The buttons above the list of profiles allow you to do the following:



Add

This will create a new profile and add it to the end of the list. You will have the option to create a profile using the default settings that are used when the program first runs or to base it on the settings on the currently active profile.

This will retain the current window positions, grid options and other settings from which you can make further changes.

Copy

A new profile will be created using the settings of the currently selected profile in the list of profiles (as opposed to the currently active profile). This again gives you a basis from which to make further changes.

Insert

This will create a new profile and insert it before the currently selected item in the list of profiles. As with adding, you are given the option to base the new profile on the default settings or on the currently active profile.

Move Up

Moves the selected item up one place in the list of profiles

Move Down

Moves the currently selected item down one place in the list of profiles

Delete

Deletes the currently selected profile from the list of profiles. The settings file on disk will not be deleted and can be imported should you need it again. However if you create a new profile with the same name as one that has been deleted the disk file will be overwritten with the options of the new profile.

Import

An advanced option that allows you to import option files. This allows one person to create a profile that can be shared amongst several users. The other users can import the file and it will then be saved amongst the other profiles on their PC.

When you create a profile that you want to share with others you will find it in the CostsMaster Application Data Directory. The location of this folder can vary from PC to PC but if you go to the Help menu and click "About" the value for your Computer will be displayed. Navigate to that directory and look for a file with the same name as the profile you created. Copy this to the other user's PC and get them to import it in their Profiles Manager.

Chapter 10

Tools and Utilities

Tools & Utilities

History

Ctrl + H

The History window gives you an overview of the recent changes made to your CostsMaster file as well as giving you the opportunity to revert to a specific point in that history, undoing any changes made in the interim.

The history window contains a grid which shows each change that has taken place as a separate row. The grid columns contain information on the type of change, the date and time the change took place, the location of the item that was changed and (if appropriate) the field that was changed together with the old and new values.

Selecting a row in the grid enables the Undo button at the bottom of the window. Clicking this button will undo all the changes up to this point. Once an undo operation has been carried out you can reverse all or part of the change by selecting the point you want to go back to and clicking the Redo button.

Please note that the History window will only contain items that have changed since you last opened your file. Items from previous sessions are not retained and cannot be undone, but any backup files on disk are listed here and you can use the History window as a convenient way to revert to a backup file.

In large files the history function can cause the program to become slow as many functions require a copy of the entire file to be saved in case it is needed to be undone. If you wish to turn the history off you can do so using a option in the Local Settings window.

Find & Replace

Ctrl + F

CostsMaster includes comprehensive tools to search for and optionally replace any text you have entered into the program.

Search For

Type the text you want to find or replace in the top most box. Below this are two options:

Ignore Case - When this option is ticked the search routine will not distinguish between text in upper and lower case.

Whole Words Only - When this option is selected the matching text is found only if it forms a whole word on its own e.g. searching for "sum" would not match "Summer" with this option selected but would if it was not selected.

Find First / Find Next - Clicking this button will find the first/next occurrence of the word in the file. The window containing the specified word will be opened and the text highlighted.

Replace By

When this option is selected any text found will be replaced by the specified text.

Prompt on Replace - when this option is selected you are asked for confirmation that you want the replacement operation to be carried out. If this option is not selected, then any replace operation will not apply to dates, due to the ease with which date elements could inadvertently be replaced.

Replace First/Next - Clicking this button will find the first/next instance and display it. If "Prompt on replace" is selected you will be asked to confirm the replacement otherwise the replacement will happen but you will have to click the Find Next button to continue the replacement operation.

Replace All - Clicking this button will replace all instances of the word without having to click the Find Next button each time. If you have selected "Prompt on replace" then you will still be asked to confirm each replacement.

More Options

By default CostsMaster will search in all locations for the specified text but by clicking the "More Options" button you can gain access to a set of controls that allow you to specify not only which areas of the program you want to search in but also which parts.

Finding text in hidden columns

If text is found in a column that is hidden the column is made visible but only until the window is next closed. If you want to reset the columns without closing the window you can do so using the button for this purpose on the grid toolbar.

Searches

CostsMaster has a number of searches you can perform in order to report on items that you might want to address before exporting a bill. The results are displayed in a grid that can be edited to correct the blank time without having to locate the original entry. The refresh button at the bottom of the window will re-run the search.

Search for Blank Time

The blank time search looks through all attendances and shows any where the time and the lump sum are zero.

Search For Blank Disbursements

The blank disbursements search looks through all disbursements (including disbursements embedded within attendances) and shows any where the amount is zero.

Search for Estimated Time

The estimated time search looks through all attendances and shows any that have been marked as estimated.

Search for Excluded Attendances

The excluded attendances search will show you all attendances within the file that have been marked as excluded, whether directly or as a result of another item higher up being excluded.

Search for Excluded Disbursements

The excluded disbursements search will show you all disbursements within the file that have been marked as excluded, whether directly or as a result of another item higher up being excluded.

Search for Attendances with Unassigned Phases

This will search for any attendances that do not have a phase assigned to them.

Search for Disbursements with Unassigned Phases

This will search for any disbursements that do not have a phase assigned to them.

Search for Attendances with Unassigned Tasks

This will search for any attendances that do not have a task assigned to them.

Search for Disbursements with Unassigned Tasks

This will search for any disbursements that do not have a task assigned to them.

Search for Attendances with Unassigned Activities

This will search for any attendances that do not have an activity assigned to them.

Search for Disbursements with Unassigned Expenses

This will search for any disbursements that do not have an expense assigned to them.

Verify Counsel's Fees

This search looks at all Counsel's fees within procedural steps and shows any where the procedural step is not set to be a hearing or conference with Counsel.

Search for Items Marked "Draw Attention"

This search will locate all items that have been flagged with the Draw Attention property.

Search for Attendances with Conflicting LA Activities

The value of attendances in CostsMaster is determined by the Rate Type selected for the attendance, but for Legal Aid XML files uploaded to CCMS, the rate is not supplied and CCMS uses the LA Activity to determine the rate. This can cause a discrepancy between the figures shown in the CCMS Supporting Documentation and the figures priced by CCMS. This search looks for any attendances where the rate type is likely to give a different figure in CostsMaster from the figure generated from the LA Activity, so that you can alter one or the other to match.

Spelling Check

This tool will perform a spell check of your entire file. Any words which are not found in the dictionary will be flagged up in a window where you will have the opportunity to alter them, ignore them or add them to the dictionary.

Not every piece of text in a CostsMaster file is checked as many fields record work that is not likely to be in a spelling dictionary, such as a legal aid reference number. The main description field of each item is always checked as are fields that contain substantial text. Fields that contain names are not checked.

In addition it is possible to specify whether CostsMaster should check the spelling in different sections of the file. These options are set in the Local Settings window, spelling page.

Apply Legal Aid Codes

When you type a description for an attendance the program will attempt to work out the most suitable legal aid code for the attendance based on key words in the description as defined in the Abbreviations and Legal Aid Codes window.

If you import a CostsMaster 2 file where codes have not been set, or if you alter the key words and wish to change the existing codes based on the new settings you can use this tool to do just that.

When you invoke this tool you will be asked if you want to overwrite all codes or only codes that have not been set. After this the program will examine each attendance and set the Code value automatically.

Apply Phases, Tasks & Activities

This tool will allow you to apply Phases or Tasks, Activities and Expenses to an existing file where this information has not been set or where you want to replace the information that has been set.

The tool varies depending on the current setting for Show Phases in the Control Centre. If you are showing Budget Phases then this tool will apply phases, whereas for the other settings this tool will apply Tasks, Activities & Expenses.

The tool works by looking for the existence of key words in the description of each item. These key words are defined in the Presets window where there are separate sections for phases, tasks, activities and expenses. A few values are provided but you are able to change those and add your own values and you should do this before running the tool.

When you invoke this tool you will be asked if you want to overwrite all values or only values that have not been set. If you had already set some values manually you would probably only want to set values for items not already set, otherwise there is a risk of existing values being changed. If information had already been set but you doubted its veracity and felt that the key words that you had defined would give you a more accurate result, you would probably choose to overwrite all values.

After this the program will examine each attendance and disbursement and set the phase, task, activity or expense value automatically.

Please note that if a phase has been set for an item, the tool will only set tasks that are compatible with the phase. In addition, if you are using this tool to apply tasks to work that has been budgeted and some items of work were left "unassigned" as you intended them to appear in an eventual phase bill as non-phase costs, the use of this tool could result in tasks being assigned to this hitherto unassigned work which could result in it acquiring a phase. In general in is better to identify such work and apply appropriate tasks manually before running this tool.

Split Routines Pro Rata By Phase or Task

This tool will split all routine work that does not have a phase or task assigned and assign phases or tasks pro rata with the timed work assigned to each phase or task.

This tool will only ever give an approximate result but it may be useful for historical work where ultimate accuracy is not required.

For the best results please ensure that all timed work is assigned to a phase or task as appropriate before running this tool.

Mark Estimated Time As Excluded

This tool will examine your entire file and mark any item as excluded that has the estimated property set.

Mark Disbursements as Assessed as Drawn

This tool will alter all disbursements within a file to set the assessed amount and assessed VAT columns to the value of the Amount and VAT columns respectively. You can choose to alter all disbursements (overwriting any existing values) or alter only those disbursements with no figure set for the Assessed Amount value. This allows you to go through a file, enter the assessed amount for any disbursements that have been reduced, exclude any that have been disallowed, then store the full amount claimed in the assessed columns for the remainder.

Time Recording

Ctrl + Alt + Shift + T

This can also be accessed from the Tools menu.

This feature can be used for recording the time spent costing a file. This can be useful if the costs draftsman wishes to keep an accurate record of time spent preparing the bill or case plan for invoicing purposes. It can be activated as follows:

The time recording window shows the current time being recorded and the total time recorded so far on the file. The current time will be reset if you:

(a) save the file

(b) stop recording time, or

(c) do not use a mouse or keyboard on a CostsMaster window for the idle timeout period

To record time you must first enable time recording on the window. Here you can also specify the idle timeout (from 0 to 9999 minutes - 2 minutes is the default) and the minimum amount of time that is stored (from 1 to 999 minutes - 1 minute is the default).

There are three buttons at the bottom of the window:

(i) The Play button starts recording
(ii) The Stop button stops recording

In addition these two buttons indicate the current state of time recording and

(iii) The Pause button indicates that recording has been stopped by virtue of the idle timeout being reached. Clicking the pause button has no effect.

Time recording can also be started using the Ctrl + Alt + Shift + R shortcut and stopped using the Ctrl + Alt + Shift + O shortcut.

There is no need to leave the time recording window open - it merely provides information on the state of the time recording, which will continue even when it is closed.

Please note:

- There is a short delay between the actual passing of the idle timeout and the time recording window showing that time recording is paused, and a similar delay when recording starts again.
- When importing a CostsMaster 2 file any time recorded there will be added to the total time. Please check any such time carefully as the time recording system in CostsMaster 2 could give unpredictable results on occasion.

Licence Manager

Alt + Shift + D

This can be found under the Tools menu. This window provides information about the licences in use on your computer.

For information please go to Licence Management.

Backup Settings

This tool will allow you to make a backup of your settings, either for safety purposes or in order to move them to a new PC.

When you click Backup Settings it will create a copy of your settings in a zip file and you will be able to chose where on your computer this is saved and it's name. By default it is called "CostsMasterSettings_ddmmyy.zip" where ddmmyy is the current day, month and year.

If you need to restore your settings, for example after moving to a new computer, simply click the Restore Settings menu item, navigate to the settings file you saved above and open it. Your settings will then be applied.

Redact File

This tool allows you to replace sensitive or personal information within a file in order to use the file for some other purpose.

In the Redact File window you can create a list of names or other personal information which you want to remove from the file. For each you can also specify replacement text but if none is specified the name will be replaced with "X"s. You may wish to use alternative names where you want to use the file for training purposes, for example. The buttons at the top of the window allow you to add, insert, delete and reorder the items and the standard grid shortcuts apply to these functons.

In addition to adding names directly to the Redact File window, you can select text in the Narrative window, right click and select "Add to Redaction List".

When you have added all the information click the "Go" button at the top of the window. This will save the current file, replace the specified items and save the resulting file with the same name but with "Redacted" appended. The Redacted file will remain open. Should you find that you have omitted any names and need to perform a further redaction we strongly recommend that you go back to the original file and make the additions there, rather than further redacting the part redacted file. The existing list of redacted text is saved with the file and can easily be added to. Whilst it is possible to further redact a part redacted file it will result in you having at least three files on disc, one of which will be only partly redacted. The scope for confusion is greatly reduced by always going back to the main file if you need to make further changes.

Redaction strategies

We have found that when adding names it is often better to add first names and last names separately as this will cover the case where a title is used instead of a first name and it will at least partially redact the names of other family members you may have overlooked.

Check for Updates

Check For Updates

This feature can be found under "Help" on the main toolbar.

This is a new addition to CostsMaster and, if selected, will automatically run a check to see whether or not there have been any updates to CostsMaster since the version that you are using was installed. If there have been you will be informed of the latest version and given the opportunity to install it.

Configure Updates

Here you can specify whether the program automatically searches for updates and, if so, how often.

Scratch Pad

Ctrl + H

This is a basic notes window that can be viewed on the File menu. Its purpose is as a repository for notes and reminders to oneself.

The notes you make are saved with the file. If you have recorded any notes in the scratchpad for a file, the scratchpad window will be displayed automatically when you open the file.

Control Centre

Ctrl + L

The Control Centre window can be shown by clicking the "Control Centre" entry on the File menu. It will automatically be shown if the option to "Always show control centre" in the local settings window is ticked.

Running Totals

The window displays a grid showing Profit Costs, Disbursements, Counsel's fees and the total with VAT for each and a grand total inclusive of VAT.

At the top of the window are a set of buttons which

- Show the base, lump sum, enhancement, success fees, summarily assessed costs, FAS costs and Costs Draftsman's fee separately for profit costs
- Show ordinary disbursements, expert fees and Costs Draftsman's fee separately
- Show junior and leading Counsel fees separately including any success fees
- Show or hide the VAT columns
- Show inter partes and legal aid totals separately.
- Show inter partes costs in total, excluding those marked "difficult to recover" and also excluding those marked "possibly recoverable" (please see the section on recoverability for more details).

There is also a drop down box labelled "Show totals for" which optionally shows the totals for:

- the current bill

- the current part

Where the CLAIM1/CLAIM1A setting has been set to CLAIM1A in the CLAIM1/CLAIM1A Settings window the Profit costs figure will be replaced with separate figures for core costs, advocacy costs and the fixed fee. When the option to show profit in detail is selected, separate figures will be given for core costs, lump sum Core costs, advocacy base costs, advocacy enhancement, lump sum advocacy and the fixed fee.

The running totals give you an *approximate* indication of the current costs. The actual costs claimed may vary as a result of rounding depending on the type of bill exported. The running totals calculate each attendance separately and add the totals together. Your exported document may group attendances together which might result in a difference of a few pence. The difference is less pronounced with rates that use whole even numbers. Claiming enhancement often exaggerates the difference. However the difference should always be a small percentage of the overall costs claimed - usually pence and reaching pounds only in very large bills.

At the bottom of the window is a drop down panel with other options that you may wish to change frequently when costing.

Default Fee Earner

The default fee earner is the fee earner at the top of the grid in the fee earners window. This combo box allows you to quickly change the default fee earner.

The default fee earner will be the top most selected fee earner when entering routine items for a party as well as being automatically assigned when creating an attendance, so using this setting can save you time in reassigning fee earners later.

Default Phase

The Default Phase is used to specify the phase that is used for new attendances and disbursements. You can select the phase from the drop down box but please note that this control will have no impact if the attendance is within a part that has its own default phase set or for a party that has a default phase set. In these circumstances the party takes precedence followed by the part.

This control mirrors that in the Edit Bills window.

ALL Show or Hide Features

If you are preparing a legal aid only, inter partes only, Court of Protection or Central Funds bill, you may not want to see features that do not apply to the bill you are working on. This control allows you to choose which features are shown. Unlike previous versions of CostsMaster that only hid columns, this now applies to all features and will hide buttons on the main toolbar, controls in windows and export templates to name but three.

Show Work From All Parts

When this button is selected, the following windows will show all work within the bill rather than just for the current part:

- Procedural Steps
- Party Work
- Party Attendances
- Party Long Telephone Calls
- Party Miscellaneous Attendances
- Party Disbursements
- Documents
- Travelling & Waiting
- Miscellaneous Disbursements
- Costs of Assessment Attendances
- Costs of Assessment Disbursements
- Part Attendances
- Part Disbursements

In the case of the last two windows, using this option will display all attendances and disbursements respectively within the bill.

When work for all parts is shown the grids will show an additional column indicating the part that a particular item resides in. Please note, however, that it is not possible to add, delete, cut, copy, paste or reorder items when work for all parts is shown.

Please note that when this option is selected the current part will be constantly updated to the part of the currently selected item in the active grid. For example if you have this option turned on in a bill with two parts, when you open the documents window it will show entries from both parts. If part 1 is the current part, when you select an attendance that is in part 2 the main toolbar will show that the current part has now changed to part 2.

Show Phases

This option allows you to specify one of four different types of phases within the program.

- **Budget Phases** - Only phases specific to Precedent H will be shown and the task, activity and expense columns will be hidden. This is suitable if you are simply preparing a budget and you do not want the work to form part of a bill later and you do not require supporting documentation for the budget to be grouped by task and activity.
- **New Bill Phases, Tasks & Activities** - Phases, tasks, activities and expenses specific to the new bill format will be shown.

- **J-Codes** - Phases, tasks, activities and expenses specific to J-Codes will be shown.
- **COP-Activities** - Activities for the Court of Protection E-Bill

The choice made here determines which phases (and tasks and activities) are displayed in the grid and in the drop down boxes, but you can still type in values specific to a different type of phase and the program will still recognise it. So for example, with this set to show New Bill phases, tasks and activities the drop down box for activities will show the values specific to the new bill, but you can also type in the A-Code (either new bill short-form or J-Code long form) if you know them. Please see the section on Phases, Tasks and Activities for further information.

Please note that this option does not determine the phases used when exporting phase bills. That setting is made independently in the Bill Settings window.

Show Form Columns

This button allows you to specify whether columns that relate to legal aid forms, such as the Code column, should be visible. By de-selecting this you can remove unnecessary columns when working on a file that you know will be a bill, but enable them quickly when working on a file that may be a CLAIM1.

Expand Legal Aid Abbreviations

When this button is selected any legal aid code you type into the description of a cell will be expanded to its full equivalent as defined in the Legal Aid Codes tab of the Abbreviations & Legal Aid Codes window.

Do Not Set Codes For Blank Descriptions

When this button is selected legal aid codes will not be set automatically for blank descriptions. When it is not selected the program will attempt to apply a code and this will usually result in the default *OT code being selected.

Set Additional Info Options

This button contains 3 sub options that determine whether and how the program automatically sets the additional info property:

- **Automatically by Codes**: The program will examine the legal aid code and if it is in the list of Auto Info codes defined in the Abbreviations & Legal Aid Codes window, the additional info property will be set.
- **Automatically if the description is not blank**: Provided there is some text in the description the additional info property will be set. This is useful if you know you are creating a CLAIM1 and you want any text you type to

appear in the additional info section.
- **Manually**: The program will not attempt to set the additional info property and you must set this manually.

Calculator

Although CostsMaster performs all of the calculations in the bill for you, there may be times when you need to perform a calculation manually. If you can't lay your hands on your real calculator CostsMaster gives you a virtual calculator that is always available from the tools menu.

Generate List of Parties

This tool will generate a list of the parties you have recorded together with their associated shortcut keys. It is useful if you have a lot of parties and want to print out a list to aid with remembering the shortcuts.

The list can be generated in RTF or PDF format. The list is saved in the same directory as your file (or the default location if you haven't yet saved your file). If you save it as an RTF file it will be opened in TextMaster and if you save it as a PDF file it will open in the Default PDF reader on your system.

Chapter 11

Software Licensing

CostsMaster Licensing Methods

CostsMaster is licensed using software product keys. There are three different types available:

Individual Product Keys

These are software keys that activate CostsMaster on a physical standalone machine. The code ties the licence to a physical machine but it is possible to deactivate a machine and reuse the licence on a different machine without any intervention from us. This is all done in the Licence Management Window

Individual product keys require the machine to be connected to the internet when first activated and thereafter at intervals of up to 7 days.

Individual product keys can not be used on virtual machines or when running CostsMaster via Terminal Services. Recent versions of windows increasingly add security features that rely on virtualisation, and if these are enabled on your machine, then individual keys will not work.

Network Product Keys

These are software keys that require the installation of a licensing server on the network. The licensing server authorises copies of CostsMaster to run on the network up to the maximum number of available licences. This method is suitable if you are accessing CostsMaster remotely or if it is running on a virtual machine but the licence server itself must be run on a physical machine on the network.

The licence server requires a connection to the internet in order to pick up changes in licence numbers.

Online Product Keys

These are similar to network product keys except that the licence server is hosted by us remotely. They are therefore suitable if you have no physical machines on which to run the licence server.

All users will require an internet connection to use this type of licence though there is a grace period (to get you over any occasional loss of connectivity) during which CostsMaster will continue to function fully.

Please see the Licensing User Guide for further information on the differences between each type of licence and additional help on selecting the type that is right for you.

Dongles

Licenses for CostsMaster were previously provided using USB dongles. These are no longer issued, and as of version 6 network dongles still work with CostsMaster but individual dongles have been completely phased out. Anyone still using an individual dongle will need to contact licensing@costsmaster.co.uk to arrange for a replacement product key.

Licence Management

Alt + Shift + D

The Licence Management window can be accessed from the Tools menu within CostsMaster. It will show automatically at start-up if no licence has been enabled for the program.

This window allows you to specify the type of licensing you are using with CostsMaster as well as providing information about the licenses in use on your computer and allowing you to upgrade a license.

You can select from six options as follows:

None (Trial)

This allows the program to run in restricted trial mode where only 15 hours work can be recorded. If you have purchased CostsMaster or have obtained an extended trial please select one of the other options to activate your licence.

Local Activation

If you have chosen to license via individual activation keys you should enter them here. Enter the key which is in the form XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX into the Product Key box and click the "Activate" button. The program will contact the CostsMaster activation server via the internet and authorise your copy of the program.

If, in the future, you need to move your licence to a different computer you can deactivate it here then repeat the activation process on the new computer. Once a key has been entered, you don't have to re-enter it again from scratch when re-activating - simply click the "Show Previous Key" button and the key will be recalled.

Once activated, the computer will remain activated and the key cannot be used elsewhere until it is specifically deactivated on this computer. If you regularly use your key on more than one computer, you can click the Auto-Deactivate box which will cause CostsMaster to deactivate the licence when it closes and re-activate it automatically on start up. This will leave the licence free and allow you to use CostsMaster on more than one machine provided that CostsMaster is not running on both at the same time, e.g. if you use CostsMaster on both a work and home PC.

Network

If you have chosen to license via a network license server you can select this option. The address and port of the license server must be entered (you can get these from your IT department who will have set up the network license server on your network) and you can then request a network license. The license is dropped automatically when the program is closed but if necessary you can explicitly drop the licence should you need to do so (e.g. to enable someone else to use it) by clicking the "Drop Licence" button.

Network administrators setting up the machine for multiple users should see the Licensing User Guide for further details of how to do this, together with details of firewall configuration.

Online

If you have chosen to licence via an Online licence server you can select this option. This is generally set up by the network administrator as it requires access to the password that will have been set up by them previously. However if you have been trusted with the password, together with the IP address and Port of the server, you can click the Set Up Licence Server details button and enter the details there. When done click the "Request Lease" button to attempt to obtain a lease.

Once authorised, the details will be stored for future use so you won't have to enter them every time. However, if you need to use CostsMaster on a machine that you don't want to remain activated, for example if you are working at the premises of a client, you can leave the password blank, then when you request a lease you will be prompted and if you press "ignore" at this point you can enter your password but it won't be stored on the machine.

Network administrators setting up the machine for multiple users should see the Licensing User Guide for further details of how to do this, together with details of firewall configuration.

Local Dongle

Local dongles are no longer supported. If you still have a licence on a USB dongle, please contact us at licensing@costsmaster.co.uk for details of how to swap your licence to an alternative method.

Network Dongle

This option is for users who have an older network licence on a physical USB dongle. Selecting this option will cause the program to scan the network for a network dongle server. If found a licence will be requested and details will be shown. If the automatic scanning doesn't work, it is possible to direct CostsMaster to the address of the licence server. Full details on how to do this can be found in the Licensing User Guide.

Chapter 12

Quota Mode

Quota Mode

CostsMaster Quota is a slimline version of CostsMaster Draftsman that allows the user to produce costs budgets and statements of costs for summary assessment. Everything it does can also be done in Draftsman, but as it has far fewer features, some users prefer the simpler user interface.

Quota is included free of charge with Draftsman. A shortcut is installed with the program that will start CostsMaster Draftsman in Quota mode.

Whilst this guide generally covers all the features available in CostsMaster Draftsman, in this chapter we explain the differences when running the program in Quota mode.

The biggest difference is that not all windows are available. When setting up the file, any windows not directly relevant to Costs Budgets or N260s are not available (e.g. Additional Liabilities or Fixed Recoverable Costs). In addition, the number of locations where you can record work is limited to two windows, Documents and Disbursements, and there are no sections for Procedural Steps, Parties etc. It is still possible to import work, but the pending work window is not available, with all work arriving directly in the Documents and Disbursements windows. However, these windows have some of the features from the pending work window, such as the ability to easily split items.

The other big change is that Categories are known as "Grades" in Quota Mode and there is no separate Rates window. Instead, the basic hourly rate is recorded directly against the Grade and it is not possible to specify rates for telephone calls and letters that are anything other than one-tenth of the hourly rate.

Other than a few other minor differences, the program works in exactly the same way, and all the majority of the advice in this guide can be applied equally to CostsMaster in Quota mode.

Files saved when in Quota mode are different from Draftsman files and have their own file extension (.cmxq). Quota cannot open Draftsman files (.cmxd) but if you start working on a file in Quota and then decide you need some features only available in Draftsman (e.g. a file for which you prepared a budget now requires a full bill), you can open it in the latter to continue working. The file will then be saved as a Draftsman file so you can't subsequently go back to work on it in Quota thereafter.

Chapter 13

Getting Help

Getting Help

The User Guide & Other Documents

User Guide & Help File

The user guide and help file both have the same content but are in different formats.

The user guide is in Adobe PDF format and is set out in chapters like a book. Although it has an index at the end it is really suited to reading about a topic as a whole.

The user guide is installed with the program and can be accessed from the Documentation section of the Help menu.

The help file is in Microsoft HTML Help format and is broken down into smaller blocks of text that are specific to a particular subject. This makes it more useful for finding specific information whilst using the program.

The help file can be accessed in a number of ways:

- From the Help menu on the main toolbar
- By clicking on the Help button that appears at the bottom of most windows
- By using the Ctrl + Shift + ? shortcut in any grid

The first method will take you to the contents page of the help file but the other methods will take you directly to the most relevant page for the window you currently have open.

Shortcut Sheets

These are a list of the most common shortcuts available in CostsMaster. They are designed to be printed off on thick A4 paper or card and folded in half to give two sheets which can be stood up on your desk as an aide-memoire.

Quick Start Guides

In addition to the main user guide we also provide some quick start guides which are designed to give you a quick practical example of how to produce a particular document. Guides are available for

- Bills
- Inter Partes Bills
- Phase Bills

- Electronic Bills
- COP-E
- Inter Partes & Legal Aid Bills
- Costs Budgets
- Case Plans & CLAIM1s
- CLAIM1As
- CCMS Bills
- Family Fixed Fee Bills

Tip Of The Day

These are a series of tips which can be displayed when the program first starts or at any time by selecting the menu item on the Help menu.

Technical Support

Technical support is available to registered users by email to support@costsmaster.co.uk or by telephone to 0800 043 2091. The support lines are manned Monday to Friday between the hours of 10.00am and 4.00pm.

You can also email us by selecting the "Email Support" option on the help menu. This method has the advantage that you can optionally include the current file you are working on without having to manually attach it to an email. It also allows you to attach backup and settings files and to include diagnostic information about your computer, though you should select this last option only if we have asked you to do so as it is quite lengthy.

Our lines are staffed by experienced costs draftsmen who are also CostsMaster users themselves and who are adept at explaining how to put your knowledge of costs drafting to the best use in CostsMaster. Of course we can also help with any technical issues you might have from time to time.

If Things Go Wrong

Occasionally you may experience an error in CostsMaster. Although we test the program thoroughly before release, we are only human and you might stumble upon a hitherto undiscovered bug. If the program code encounters an error you will be presented with an error box with several options:

Send Bug Report

This will send a bug report to us so we can investigate and fix the problem. The bug report will include details of your hardware and any other programs running at the time of the crash, but all information received is treated in the strictest confidence.

You will also have the option to include a screen grab - please do as a picture really does speak a thousand words in these cases. You are also invited to enter a description of the problem. Please use this space to tell us as near as possible what you were doing immediately prior to the problem appearing. The more information you can give us the more likely we are to trace and fix the problem.

Continue

This will close the error report without sending the bug report.

Close and lose data

This will close the program immediately. As is suggested by the name, any unsaved data will be lost. This is therefore a button of last resort and should be used only if the program is stuck in a cycle of error messages from which you cannot escape any other way.

Chapter 14

CostsMaster Reference

Export Phrase Formatting

This section describes the different means of formatting export phrases from within the Export Phrases Window.

Dates

Dates have the following formatting options, given an example date of 6 August 2011:

Day

6
06
6th
None

Month

8
08
Aug
August
None

Year

11
2011
None

Separator

/
Space
:
.

Example Date

The example date defaults to the current date but can be altered from the box at the bottom of the window.

Time

Times have the following formatting options, given an example time of 126 minutes:

Hours

2
02
2h
2 hours

Mins

6
06
6m
6 minutes

Mins (Decimal)

0.1
0.10
0.100
0.1000

Separator

:
Space
.
-
None (*not Decimal*)
· (middle dot)

Decimal Hours

There are two caveats to bear in mind when changing this setting.

First, the selection simply determines how the **Mins** option is interpreted. CostsMaster does not remember how **Mins** was set before **Decimal Hours** was changed and will not revert if it is changed back.

Second, the "None" setting for the **Separator** is equivalent to a regular decimal point if **Decimal Hours** is set, since it make no sense to have no separator in this context.

Currency

Currencies have the following formatting options:

Symbol

£
None

Pounds

If not zero
Always

Pence

Don't Show Zero
Show Zero

Separator

.
Space
Double space
:
-
· (middle dot)

Padding

Increasing the value beyond zero will place the symbol this many digits away from the figure at a minimum. This is used to align pound signs in a neat row.

Thousand Separator

Inserts a comma before every third set of pound figures.

Show If Zero

If ticked will show a zero amount rather than showing nothing.

Decimal

A decimal figure is one that can have a fractional element but which is not a currency. Decimal figures have the following formatting options:

Units

If not zero
Always

Fraction

Don't Show Zero
Show Zero

Separator

.
Space
Double Space

:
-
· (middle dot)

Thousand Separator

Inserts a comma before every third set of pound figures.

Show If Zero

If ticked will show a zero amount rather than showing nothing.

Sequential

A sequential number is a whole number with no fraction that follows a sequential format. Sequential numbers have the following formatting options, given an example amount of 25:

Style

1, 2, 3, 4
i, ii, iii, iv
I, II, III, IV
a, b, c, d
A, B, C, D
A, B..Z, a, b..z
a, b..z, A, B..Z
one, two, three
One, Two, Three

Minimum Digits

Setting a value greater than zero will add zeros to the beginning of the number if necessary to make it up to the number of digits specified

Show Zero

If ticked will show a zero amount rather than showing nothing.

Keyboard Shortcuts

Shortcuts for Windows

The following shortcuts will open their respective window or bring it to the front if it is already open.

Bill Windows

Ctrl + Alt + B	Bills
Ctrl + Alt + C	Categories
Ctrl + Alt + D	Case Details
Ctrl + Alt + F	Fee Earners
Ctrl + Alt + G	Report Settings
Ctrl + Alt + H	Periodic Enhancement
Ctrl + Alt + J	Bill Settings
Ctrl + Alt + K	Legal Aid Claim Settings
Ctrl + Alt + L	Case Plan Settings
Ctrl + Alt + N	Narrative
Ctrl + Alt + P	Parties
Ctrl + Alt + Q	Counsel
Ctrl + Alt + R	Rates
Ctrl + Alt + S	Success Fees
Ctrl + Alt + T	Parts
Ctrl + Alt + V	Costs Budget Settings
Ctrl + Alt + W	Breakdown Settings
Ctrl + Alt + Y	Costs Budgets
Ctrl + Alt + Z	Electronic Bill Settings

Part Windows

Alt + C	Costs of Assessment
Alt + D	Documents
Alt + J	Miscellaneous Disbursements
Alt + K	Part Disbursements
Alt + L	Part Attendances
Alt + P	Party Work
Alt + R	Part Rates
Alt + S	Procedural Steps
Alt + W	Travelling & Waiting

General Window Shortcuts (in Windows that have these columns and/or buttons)

R Ctrl + R Shift + A	Attendances
R Ctrl + R Shift + C	Case Details
R Ctrl + R Shift + D	Disbursements
R Ctrl + R Shift + F	Legal Aid Certificate
R Ctrl + R Shift + G	Long Telephone Calls in the Party Details Window

R Ctrl + R Shift + H	Enhancement
R Ctrl + R Shift + I	Inter Partes Limitation
R Ctrl + R Shift + L	Legal Aid Limitation
R Ctrl + R Shift + M	Miscellaneous Attendances in the Party Details window
R Ctrl + R Shift + R	Party Details (Routine Items)
R Ctrl + R Shift + S	Summary Assessment Details
R Ctrl + R Shift + V	VAT
R Ctrl + R Shift + X	Expand Abbreviations
R Ctrl + R Shift + Z	FAS Details

Other Window shortcuts:

Ctrl + F	Find & Replace
Ctrl + H	History Window (Undo & Redo)
Shift + Alt + A	Abbreviations Window
Shift + Alt + D	Licence Manager
Shift + Alt + E	Export Phrases Window
Shift + Alt + I	Import Work Window
Shift + Alt + O	Output Work Window
Shift + Alt + T	Toolbar Settings Window
Shift + Alt + W	Pending Work Window
Alt + Enter	Closes the active window and applies any pending changes
Alt + Shift + Enter	Closes the active window without applying any pending changes.

Shortcuts for Grids

Due to the number of shortcuts required, some key combinations are used more than once.

Shortcuts that apply to all grids:

Ctrl + Shift + A	Add and edit an item.
Ctrl + Shift + B	Show the grid rows in alternate colours
Ctrl + Shift + D	Delete the selected items
Ctrl + Shift + E	Edit the selected items
Ctrl + Shift + G	Grid Settings
Ctrl + Shift + H	Extended Characters
Ctrl + Shift + I	Insert an item
Ctrl + Shift + K	Show and select columns
Ctrl + Shift + M	Toggle multi-select mode
Ctrl + Shift + N	Add a new item
Ctrl + Shift + O	Show the notes window
Ctrl + Shift + Q	Select All
Ctrl + Shift + W	Mark the item as requiring attention (Warning).
Ctrl + Shift + X	Exclude the currently selected items from the

	bill
Ctrl + Shift + ↑	Move the selected items up
Ctrl + Shift + ↓	Move the selected items down
Ctrl + Shift + <	Contract the rows of the grid so that they show one line of text
Ctrl + Shift + >	Expand the rows of the grid so they show all text for each item
Ctrl + Shift + ?	Help for the grid
Ctrl + C	Copy text
	Copy items (in multi select mode)
Ctrl + V	Paste text
	Paste items (in multi select mode)
Ctrl + X	Cut text
	Cut items (in multi select mode)
Ctrl + Enter	Adds a hard carriage return.
Alt + ↓	In the properties column, displays the properties pop up menu
	In columns with a drop-down box causes the list of options to drop down
	In columns with preset suggestions, causes a list of suggestions to drop down
Alt + ↑	Causes any drop-down list to close up.
Alt + Shift + ↓ or ↑	In columns with a drop-down box or with preset suggestions, cycles through the available possibilities (overwriting the current contents of the cell)
Alt + Home / End	In a column with a drop-down list showing, selects the first or last item.
Alt + Shift + Home / End	In a column with a drop-down box or with preset suggestions, selects the first or last item (overwriting the current contents of the cell).
Shift + Home	In multi-select mode, selects all items from the current item to the first item in the grid.
Shift + End	In multi-select mode, selects all items from the current item to the last item in the grid.

Shortcuts that apply to some but not all grids:

Right Shift + Right Control + A	Attendance window for grids that offer an attendances column
Right Shift + Right Control + C	Case Details window for the bills grid
Right Shift + Right Control + D	Disbursements window for grids that offer a disbursements column
Right Shift + Right Control + E	Long Emails for the Party Work and Party Details grid
Right Shift + Right Control + H	Enhancement window for grids that offer an enhancement column
Right Shift + Right Control + F	Legal Aid Certificate window for the Parties to the Action grid
	FAS in the Procedural Steps grid

Right Shift + Right Control + I	Long Letters In for the Party Work and Party Details grid
Right Shift + Right Control + T	Long Telephone Calls window for the Party Work and Party Details grid
Right Shift + Right Control + L	Long Letters Out for the Party Work and Party Details grid Part Limitation in the Parts Window Limit to Percentage of Damages in the Success Fees Window
Right Shift + Right Control + M	Misc attendances window for the Party Work and Party Details grid
Right Shift + Right Control + P	Preparation for the Party Work and Party Details grid
Right Shift + Right Control + R	Party Details window (routine items) for the Party Work grid
Right Shift + Right Control + S	Summary Assessment Details window for the Procedural Steps grid
Right Control + E	Standard Emails for the Party Work and Party Details Windows
Right Control + I	Standard Letters In for the Party Work and Party Details Windows
Right Control + L	Standard Letters Out for the Party Work and Party Details Windows
Right Control + R	Standard COP Letters Out for the Party Work and Party Details Windows
Right Control + T	Standard Telephone Calls for the Party Work and Party Details Windows
E	Standard Emails for the Party Work Window
I	Standard Letters In for the Party Work Window
L	Standard Letters Out for the Party Work Window
R	Standard COP Letters Out for the Party Work Window
T	Standard Telephone Calls for the Party Work Window

Shortcuts that apply to Attendances grids:

Ctrl + Shift + F	Mark the item as appearing in the additional information section on a CLAIM1
Ctrl + Shift + P	Mark the selected items as having time recorded on a print out.
Ctrl + Shift + S	Mark the selected items as estimated
Ctrl + Shift + X	Expand abbreviations immediately (applies to Edit Attendances window only)
Ctrl + Shift + 9	Recoverability Green
Ctrl + Shift + 5	Recoverability Yellow

Ctrl + Shift + 1	Recoverability Red
Ctrl + Shift + 0	Solicitor/Client

Shortcuts that apply to Disbursement grids:

Ctrl + Shift + L	Mark the selected items as being recoverable from the LAA
Ctrl + Shift + P	Mark the selected items as having been paid
Ctrl + Shift + R	Mark the selected items as having a paper receipt
Ctrl + Shift + S	Mark the selected items as estimated
Ctrl + Shift + T	Mark the selected items as being Expert fees
Ctrl + Shift + V	Mark the selected items as having a paper invoice
Ctrl + Shift + 9	Recoverability Green
Ctrl + Shift + 5	Recoverability Yellow
Ctrl + Shift + 1	Recoverability Red
Ctrl + Shift + 0	Solicitor/Client

Speed Shortcuts in the Party Details Window

A	Attendances
D	Disbursements
E	Add an Email Out (Shift + takes away)
F	Long Emails Out
G	Long Telephone Calls
I	Add a Letter In (Shift + takes away)
J	Long Letters In
L	Add a Letter Out (Shift + takes away)
M	Miscellaneous Attendances
N	Long Letters Out
P	Preparation
R	Add a COP Routine Letter (Shift + takes away)
T	Add a Telephone Call (Shift + takes away)
0-9	Change Current Fee Earner
Ctrl + < or >	Change Routine Phase

Shortcuts that apply to the Bills & Parts grids:

Ctrl + Shift + V	Mark the selected items as claiming VAT

Shortcuts that apply to the Categories grid:

Ctrl + Shift + L	Mark the selected items as being for Legal Aid costs (6 column bills only)

Shortcuts that apply to the Counsel grid:

Ctrl + Shift + C	Mark the selected Counsel as being Leading Counsel.

Ctrl + Shift + F	Mark the selected Counsel as being instructed under the FGF Scheme
Ctrl + Shift + L	Mark the selected Counsel as being Legal Aid.

Shortcuts that apply to the Parties To The Action grid:

Ctrl + Shift + C	Mark the selected parties as being clients.

Shortcuts that apply to the Notes grid:

Ctrl + Shift + P	Mark the selected items as being private

Auto-complete shortcut:

Shift + Enter

In a date column uses the date of the previous item.

In the description column of a disbursement grid that contains a whole number, interprets the number as being mileage, calculates the mileage claim and creates a description using the phrase and mileage rate defined in Local Options > Auto-Insert Text.

In the description column of other grids adds a document tag reference.

In the VAT column of a disbursement grid calculates the VAT based on the value in the amount column.

In the amount column of a disbursement grid interprets the value in the amount column as being inclusive of VAT and separates it into the principal and VAT elements.

In the Expert Prep Rate and Expert Time fields of a disbursement grid calculates the amount from the rate and time. Because it is not possible to know if the expert is VAT registered, this will not calculate the VAT unless it is already greater than zero, but you can force the VAT to calculate by using Shift + Ctrl + Enter

In the percentage field of a disbursement grid recalculates the amount as if the figure that was entered was the amount after the percentage was applied. This is intended for cases where the invoice shows the amounts at the reduced rate. This will not calculate the

VAT unless it has already been set but you can do this by using Shift + Ctrl + Enter instead.

Other Shortcuts

File Shortcuts

Ctrl + A	Save File As
Ctrl + D	Scratch Pad
Ctrl + E	Create Bill
Ctrl + F	Find & Replace
Ctrl + H	History Window (Undo & Redo)
Ctrl + I	Instructing Solicitor
Ctrl + L	Control Centre
Ctrl + N	New File
Ctrl + O	Open File
Ctrl + P	Preview Bill
Ctrl + Q	Exit CostsMaster
Ctrl + S	Save File
Ctrl + T	New From Template
Ctrl + W	Save As Template

Miscellaneous Shortcuts

Ctrl + ↑↓	Change Parts
Ctrl + Shift + Alt + O	Stop Recording Time
Ctrl + Shift + Alt + R	Start Recording Time
Ctrl + Shift + Alt + T	Show Recorded Time
Ctrl + Shift + Alt + Y	Reset position of all active windows
Ctrl + Shift + Alt + Z	Reset main toolbar position

Import File Fields

Import File Fields

The following is a list of fields that can be imported from an Excel or CSV file for attendances and disbursements. Please see the section on importing work for more information.

Column	Attendance	Disbursement	Notes
Activity Code	Y		The activity code for an attendance. This must either match a four character JCode e.g. A101, A120 etc. or a New Bill activity Code A1-A10.
Amount		Y	The amount of the disbursement. Currency symbols are allowed.
Category	Y		The name of the category for an attendance e.g. "Partner".
CMS Activity	Y	Y	This is intended to be the "Activity" field from a time recording system. CostsMaster provides a field so this information can be stored for reference purposes if needed.
Date	Y	Y	The date of an attendance or the Invoice Date of a disbursement. This will accept any date format as specified in the Entering Dates section of this document including partial dates and date ranges.
Description	Y	Y	The description of the attendance or disbursement.
Doc Ref	Y	Y	This field is intended to hold a reference to an attendance note, disbursement or similar in a bundle or document management system. Anything recorded here will appear as a note in the exported Excel document as a note attached to the description field.
Entry No	Y	Y	A value that identifies the particular attendance or disbursement (e.g. a database id). This is used for the Precedent S electronic bill and is also used by CostsMaster to calculate the Entry Alloc % value where a long attendance note is split into separate items.
Expense Code		Y	The expense code of a disbursement. This must either match a four character JCode e.g. X103, X123 etc. or a New Bill expense Code X1-X15.

Fee Earner	Y		The name of the fee earner for an attendance. Currency Symbols are allowed.
Hourly Rate	Y		The hourly rate applied to the attendance.
Location	Y	Y	The intended location for the attendance or disbursement within CostsMaster. Must be one of the pre-defined codes specified in either table 1 or table 2 below.
Lump Sum	Y		Whilst most attendance work is calculated from time and rates, it is also possible to record a lump sum, and this field allows such figures to be imported also.
Note	Y	Y	The imported data will appear as a note within CostsMaster attached to the attendance or disbursement. This can be used for data that you want to keep for reference only.
Party	Y	Y	The name of the external party in connection with whom this attendance or disbursement was undertaken. e.g. "Client", "Defendant", "Medical Expert".
Phase Code	Y	Y	The phase code of the attendance or disbursement. This can match a four character J-Code e.g JA00, JB00 etc., or a New Bill code P1 - P15. Any other value may optionally be imported as a user-defined Contingent phase name.
Print Out	Y		Whether the attendance is supported by an attendance note. A true value can be "Y", "Yes" or "True" (case insensitive). Any other value or a blank field is false.
Recover ability	Y	Y	The percentage likelihood of the item being recovered on assessment. The value can be expressed in one of two ways: (a) as a whole number in the range of 0 to 100, or (b) as a fractional percentage between 0 and 1.0, in which case the value will be multiplied by 100. With these two schemes, the value of "1" is ambiguous, so the program interprets "1" as being the former (i.e 1%) whereas "1.0 will be interpreted as the latter (i.e. 100%.) If it is easier, it is also possible to leave the field blank so that the default value of 100% will be applied. In all cases a value of -1 indicates Solicitor/ Client costs. The value also governs the red/

			yellow/green recoverability indicator where green=100, red=0 and yellow is any value in between.
Task Code	Y	Y	The task code of the attendance or disbursement. This must either match a four character JCode e.g. JA10, JH30 etc. or a New Bill task Code T1-T41.
Time	Y		The time of the attendance. This can be specified in hours (by including a decimal point separator), hours and minutes (by including a colon separator) or as a whole number, in which case the value will either be interpreted as hours, minutes or units, depending on the setting in the Import Mapping window.
Type	Y	Y	Used to identify attendances and disbursements when they are combined in a single file. A for attendances, D for disbursements and E for embedded disbursements. Applies only where "Each Row Contains" is set to "Either" or "Composite".
VAT		Y	The VAT payable on the disbursement. Currency symbols are allowed.

Table 1: Attendance Location Codes

PROC_STEP	Procedural Steps
PW_ATT	Party Work Attendances
PW_LTC	Party Work Long Telephone Calls
PW_LEO	Party Work Long Emails Out
PW_LLI	Party Work Long Letters In
PW_PREP	Party Work Preparation
PW_MISC	Party Work Miscellaneous
PW_TC	Party Work Standard Telephone Calls
PW_LO	Party Work Standard Letters Out
PW_EO	Party Work Standard Emails Out
PW_RLO	Party Work Standard COP Routine Letters
PW_LI	Party Work Standard Letters In
DOC	Documents
TWA	Travelling and Waiting
COSTS	Costs of Assessment Attendances

Table2: Disbursement Location Codes

PROC_STEP	Procedural Steps
PW_DISB	Party Work Disbursements
MISC	Miscellaneous Disbursements
COSTS	Costs of Assessment Disbursements

XML Totals File Content

XML Totals File Content

This section describes the content of an XML Totals file. This is a very simple XML format.

The top level element is named <ExportedTotals>. Within this are sub elements as detailed in the tables below.

Bills, Breakdowns & Statements of Costs

Element Name	Description	Notes
ExportDate	The date and time of the export in W3C format	
TotalCDFees	The total Costs Draftsman's fee as calculated automatically by CostsMaster and claimed in the exported document	
ProfitForCDFees	The total profit on which the Costs Draftsman's fee was calculated	
RecordedProfitNet	The total net profit costs recorded before any limitation	[1] [2]
ActualProfitNet	The total net profit costs after any limitation	[1] [2]
TotalCounselNet	The total net Counsel Fees	[1] [2]
TotalLeadingCounselNet	The total net Leading Counsel Fees	[1] [2]
TotalJuniorCounselNet	The total net Junior Counsel Fees	[1] [2]
TotalExpertNet	The total net Expert Fees	[1] [2]
TotalOtherDisbsNet	The total net other disbursements	[1] [2]
TotalProfitCoreCLSNet	The total net CLS core costs	[1] Only where the bill contains a CLS element.

TotalProfitEnhCLSNet	The total net CLS enhancement	[1] Only where the bill contains a CLS element.
TotalProfitAdvCLSNet	The total net CLS advocacy	[1] Only where the bill contains a CLS element.
TotalFASCLS	The total FAS	[1]
TotalFixedFeesCLS	The total fixed fees	[1]

CLAIM1 & CLAIM1A

Element Name	Description	Notes
ExportDate	The date and time of the export in W3C format	
TotalCDFees	The total Costs Draftsman's fee as calculated automatically by CostsMaster and claimed in the exported document	
ProfitForCDFees	The total profit on which the Costs Draftsman's fee was calculated	
RecordedProfitNet	The total net profit costs recorded before any limitation	
ActualProfitNet	The total net profit costs after any limitation	[1]
TotalCounselNet	The total net Counsel Fees	[1]
TotalExpertNet	The total net Expert Fees	[1]
TotalOtherDisbsNet	The total net other disbursements	[1]
CostsOfAssessmentNet	The total net Costs of Assessment	[1]

Standard Case Plans

Element Name	Description	Notes

ExportDate	The date and time of the export in W3C format	
TotalCDFees	The total Costs Draftsman's fee as calculated automatically by CostsMaster and claimed in the exported document	
ProfitForCDFees	The total profit on which the Costs Draftsman's fee was calculated	
RecordedProfitNet	The total net profit costs recorded before any limitation	[3]
ActualProfitNet	The total net profit costs after any limitation	[3]
TotalCounselNet	The total net Counsel Fees	[3]
TotalExpertNet	The total net Expert Fees	[3]
TotalOtherDisbsNet	The total net other disbursements	[3]

Events Based Case Plans

Element Name	Description	Notes
ExportDate	The date and time of the export in W3C format	
SolicitorEventsNet	The total events related profit costs	
PreviousSolicitorProfitNet	The total net Profit Costs for previous solicitors	
ActualProfitNet	The total net Profit Costs	
CounselEventsNet	The total events related Counsel Fees	
CounselFGFNet	The total net Counsel Fees recorded under FGF for the current solicitor	

PreviousSolicitorCounselNet	The total net Counsel Fees for previous solicitors	
TotalCounselNet	The total net Counsel Fees	
ExpertEventsNet	The total net expert fees for the current solicitor	
TotalExpertNet	The total net Expert Fees	
OtherDisbsEventsNet	The total net other disbursements for the current solicitor	
PreviousSolicitorDisbsNet	The total net disbursements for previous solicitors	Because the form has no facility for entering expert fees for previous solicitors this figure may include experts.
TotalOtherDisbsNet	The total net other disbursements	
PreviousSolicitorNet	The total net Profit Costs, Disbursements and Counsel Fees for Previous Solicitors	
TotalNetCosts	The total costs including costs of previous solicitors	

Please note:

- any elements marked [1] have a VAT equivalent where the the letters "Net" in the element name are replaced with "Vat". e.g.
  RecordedProfitNet
  RecordedProfitVat

- any elements marked [2] have IP and CLS equivalents (but only where the bill contains both inter partes and CLS costs) where the letters IP or CLS are added after the main body of the name before "Net" or Vat" e.g
  RecordedProfitNet
  RecordedProfitIPNet
  RecordedProfitCLSNet

- any elements marked [3] have equivalents for Pre and Post Case plan values where the letters "Pre" and "Post" are appended to the element name e.g.
  RecordedProfitNet

RecordedProfitNetPre
RecordedProfitNetPost

Command Line Parameters

Command Line Parameters

It is possible to alter the way CostsMaster operates via the use of command line parameters. These are additional flags passed to the program in the command line that is used to start the program.

Fading Splash Screen

/noalphablend

The splash screen that appears when first starting the program fades in and out when the program is not running under Terminal Services. This can pose a strain on older computers with inferior graphics capabilities and can be disabled by adding the /noalphablend parameter

No Splash Screen

/nosplash

It is also possible to dispense with the splash screen altogether. This is not recommended because the purpose of the splash screen is to inform the user that initialisation work is going on behind the scenes before the main windows appear. Suppressing the splash screen doesn't stop this work going on and it will therefore appear to the user that nothing is happening.

Multiple Instances of CostsMaster

/multi

By default only one copy of CostsMaster can be opened at once. Having multiple floating windows from different instances open at the same time quickly becomes confusing, and there are issues with changing settings in one version where the change will be lost if that version is not closed last. It is possible to override this and have two or more instances running but we would strongly advise against this unless you are absolutely sure you know what you are doing.

To open a second instance, you need to start the second instance with the /multi parameter. You will still get a warning asking you if you want to continue. For your sanity we would advise you to heed it.

Run CostsMaster Draftsman in Quota Mode

/quota

In order to run CostsMaster in Quota mode you can append the above parameter. You should already have a Windows shortcut on the start menu that does this. There are no additional features in Quota that are not also in Draftsman, but a user faced with the need to prepare an urgent budget may prefer the streamlined interface of Quota.

Defining a command line parameter

The easiest way to add a parameter is to alter a shortcut (either an existing one or by creating a new one if you want to use one of these features only occasionally). If you right click on a shortcut to CostsMaster and select "properties", the Windows shortcut properties box will appear. The target will probably contain something like:

```
"C:\Program Files\Costsmaster Draftsman Edition\CostsMaster.exe"
```

To add the /noalphablend parameter add it to the end like this:

```
"C:\Program Files\Costsmaster Draftsman Edition\CostsMaster.exe" /noalphablend
```

To add more than one parameter just separate them with a space:

```
"C:\Program Files\Costsmaster Draftsman Edition\CostsMaster.exe" /noalphablend /multi
```

CCMS Activities

CCMS Activities and CLAIM1 Codes

These are the permissible Activities along with the corresponding Codes which will be used if exporting a CLAIM1.

CCMS Activity	CLAIM1 Code
Attendance upon client	ACL
Attendance upon solicitor	ASO
Attendance upon/with Counsel at Conference	ACO
Attendance upon other side	AOS
Attendance upon witness	AEX / AWI
Attendance upon site	ASI
Attendance upon court	ACT
Attendance upon other	AOT
Preparation - drafting attendance note	DAN
Preparation - drafting statement	DST
Preparation - drafting affidavit	DAF
Preparation - drafting instructions to Counsel	DIC
Preparation - drafting application	DAP
Preparation - drafting pleadings	DPL
Preparation - drafting agreement/settlement	DAG
Preparation - drafting consent order/undertakings/costs order	DCN
Preparation - drafting notice(s)	DNO
Preparation - Periodic file review	DFL
Preparation - drafting bill/claim form	DBL
Preparation - research	RES
Preparation - other	DOT
Report - Research	ROT
Report - Periodic file review	ROT
Report - other	ROT
Report - Medical report	RMD
Report - other expert's report	REX
Report - Welfare report	RWE

Report - Counsel's opinion	ROP
Report - other report	ROT
Travel to court	OOT
Travel to attend client	OOT
Travel to attend witness	OOT
Travel to attend Counsel	OOT
Travel to attend site	OOT
Travel to attend other side	OOT
Travel - other	OOT
Waiting at court	OOT
Waiting - other	OOT
Advocacy - Directions Hearing	HDI
Advocacy - Interlocutory Hearing	HIN
Advocacy - Final Hearing	HFN
Advocacy - Other Hearing	HOT
Advocacy - In court behind counsel	ACO

CCMS Disbursement Activities

These are the permissible Activities together with the corresponding CLAIM1 Expert Codes/Names.

Where the Code is red, there is no Name that corresponds directly with the Activity, but there is a more general one which is a reasonable match.

Codes with yellow backgrounds will be shown as such on the CCMS Visual Equivalent, since they have no corresponding Activity: they will be mapped to "Expert - Other".

Where there is no Code/Name the Disbursement will be shown in the CLAIM1 Disbursement Table, not as an Expert claim.

CCMS Disbursement Activity	CLAIM 1 Expert Code	CLAIM1 Expert Name
A & E Consultant	AEC	A & E Consultant
Accident Reconstruction	ACR	Accident Reconstruction
Accountant	ACC	Accountant
Accountant General Staff	ACC	
Accountant Manager	ACC	

Accountant Partner	ACC	
Anaesthetist	ANA	Anaesthetist
Architect	ARC	Architect
	BAC	Back Calculations
	BEN	Benefit Expert
Cardiologist	CAR	Cardiologist
Cell telephone site analysis	CEL	Cell telephone site analysis
Child psychiatrist	CSI	Child Psychiatrist
Child psychologist	CSO	Child Psychologist
Client Accommodation Expenses		
Client Travel Expenses		
Computer expert	CRE	Computer Expert
Consultant engineer	ENG	Engineer
Courier		
Court Fee		
Dentist	DEN	Dentist
Dermatologist	DRM	Dermatologist
Disability Consultant	DIS	Disability Consultant
DNA - preparation of report	DNA	
DNA - test of sample	DNA	DNA test
Doctor (GP)	DGP	Doctor GP
	DRG	Drug Expert
Employment consultant	EMP	Employment Consultant
Enquiry Agent	ENQ	Enquiry Agent
ENT surgeon	SEN	ENT Surgeon
Expert - Other	OTH	Other
	FME	Facial Mapping
	FNG	Fingerprint Expert
	FII	Fire Investigation
	FIA	Firearm Expert
	FOR	Forensic scientist
General surgeon	SUR	General Surgeon
Geneticist	GEN	Geneticist
GP (records report)	GRE	GP (records report)
Gynaecologist	GYN	Gynaecology

Haematologist	HAE	Haematologist
Handwriting Expert	HAN	Handwriting Expert
Independent Social Worker	ISW	Independent Social Worker
Interpreter	INT	Interpreter
Land Registry Fees		
Lip reader / Signer	LRS	Lip Reader/Signer
Mediator	MEA	Mediator
Medical consultant	MCN	Medical Consultant
Medical microbiologist	MIC	Medical Microbiologist
Medical Records		
	MRE	Medical Report
Meteorologist	MET	Meteorologist
Midwife	MID	Midwife
Neonatologist	NEO	Neonatologist
Neonatologist (clin neg cerebral palsy)	NEO	
Neonatologist (non-clin neg cerebral palsy)	NEO	
Neurologist	NEU	Neurology
Neurologist (clin neg cerebral palsy)	NEU	
Neurologist (non-clin neg cerebral palsy)	NEU	
Neuropsychiatrist	NEP	Neuropsychiatrist
Neuroradiologist	NER	Neuroradiologist
Neuroradiologist (clin neg cerebral palsy)	NER	
Neuroradiologist (non-clin neg cerebral palsy)	NER	
Neurosurgeon	NES	Neurosurgeon
Nursing expert	NUR	Nursing Expert
Obstetrician	OBS	Obstetrician
Occupational therapist	OCC	Occupational Therapist
Oncologist	ONC	Oncology
Orthopaedic surgeon	SOR	Surgeon (Orthopaedic)
Other	OTH	Other
	OVE	Overnight expenses
Paediatrician	PAE	Paediatrician

Pathologist	PAT	Pathologist
Pharmacologist	PHA	Pharmacologist
Photocopying	PHC	Photocopying
Photographer	PHG	Photographer
Physiotherapist	PHY	Physiotherapist
Plastic surgeon	SPL	Surgeon (Plastic)
PNC Check fees		
Police Records		
Process server	PSR	Process Server
Psychiatrist	PSI	Psychiatrist
Psychologist	PSO	Psychologist
	PST	Psychotherapist
Radiologist	RAD	Radiologist
Rheumatologist	RHE	Rheumatologist
Risk assessment expert	RAE	Risk Assessment Expert
Solicitor Accommodation Expenses		
Solicitor Travel Expenses		
Solicitor Travel Mileage		
Speech therapist	SPE	Speech therapist
Surveyor	SUV	
Surveyor (Housing Disrepair)	SUD	Surveyor (housing disrepair)
Surveyor (Non-Housing Disrepair)	SUV	Surveyor (non-housing disrepair)
Telecoms expert	TEL	Telecoms expert
Toxicologist	TOX	Toxicology
	TRC	Transcripts
	TRL	Translator
Urologist	URO	Urologist
Vet	VET	Vet
Voice Recognition Expert	VRE	Voice Recognition

Index