



LEDESView User Guide

1.0

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Overview

RORA Client Systems' LEDESView is a simple tool, designed to help you manage your LEDES files. Whether you need to create a new LEDES file, or you just need to make a few adjustments to an already existing LEDES file, LEDESView will handle your LEDES file needs.

Note that this product only handles the following LEDES file formats:

- LEDES 1998B
- LEDES 1998BI
- LEDES 1998BI V2

The LEDES XML 2.0 format is handled in LEDESense, another RORA Client Systems tool.

Also note that LEDESView only validates data formatting rules set by the LEDES Oversight Committee (LOC). It does not validate business rules.

RORA Client Systems provides technology infrastructure for legal billing. We are dedicated to enhancing your e-billing experience.

Getting Started

- 1) Once your purchase is complete, you will receive two emails: the first email is the order confirmation; the second email is the link to download LEDESView. Click on the URL embedded in the second email to download your purchase.
- 2) You have downloaded a zip file. *Extract* the files contained in the zip file. Be sure to extract the files in a folder with which you are familiar.
 - **Hint:** *I extracted my LEDESView files on my desktop for easy access.*
- 3) Once you have extracted the contents of the zip file, note that it contains a folder with sample LEDES invoice files; readme1st.txt; and LEDESView.exe.

Now you are ready to create or edit your LEDES files.

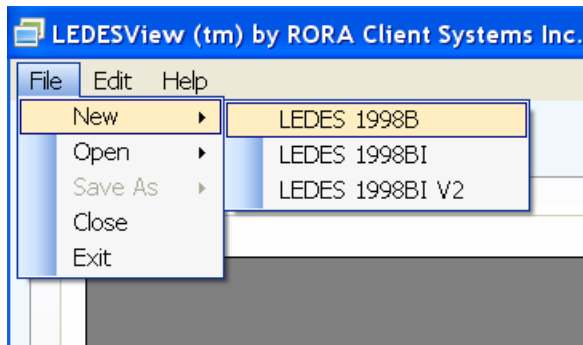


Creating a New LEDES File

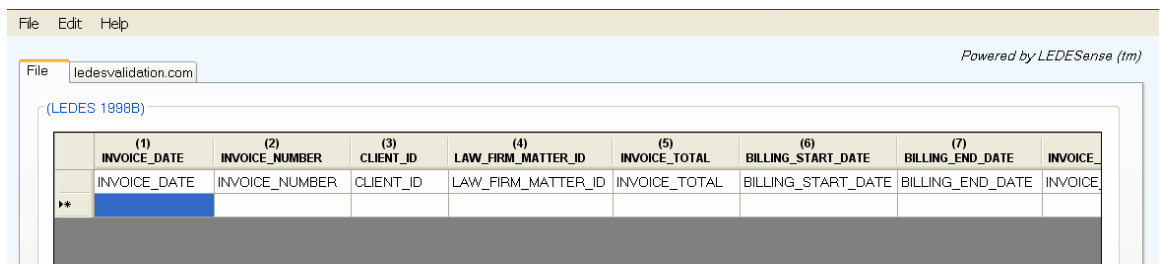
Before you start, determine which LEDES file format your client requires. This is important because not all e-billing systems accommodate all the LEDES file formats.

The following instructions are based on the creation of a LEDES 1998B file.

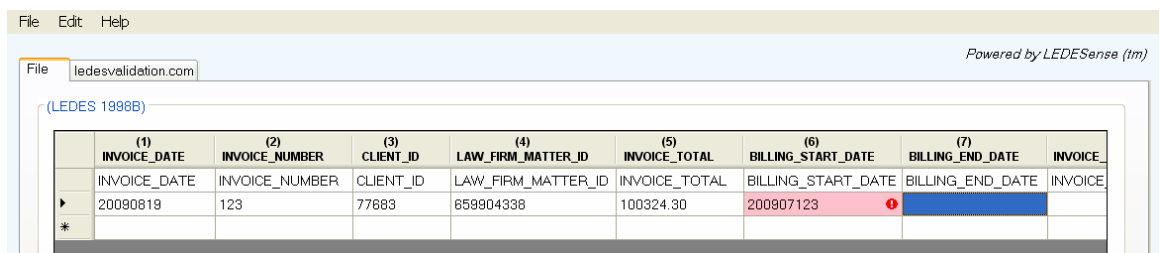
1. From the LEDESView toolbar, select *File -> New -> LEDES 1998B*




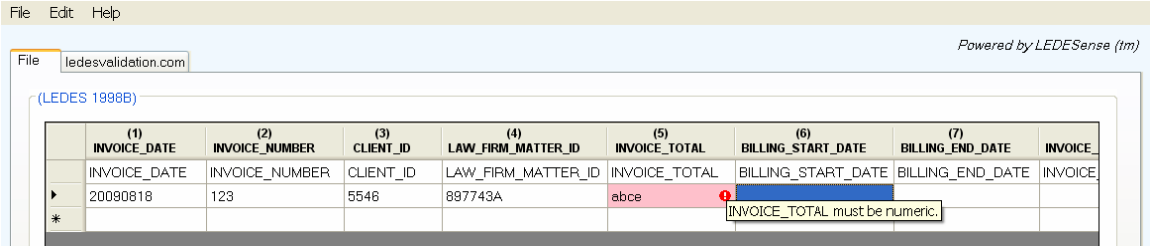
2. A spreadsheet like form will appear with the LEDES 1998B column headings



3. Place your cursor in the first blank cell under INVOICE_DATE and begin entering the invoice data.



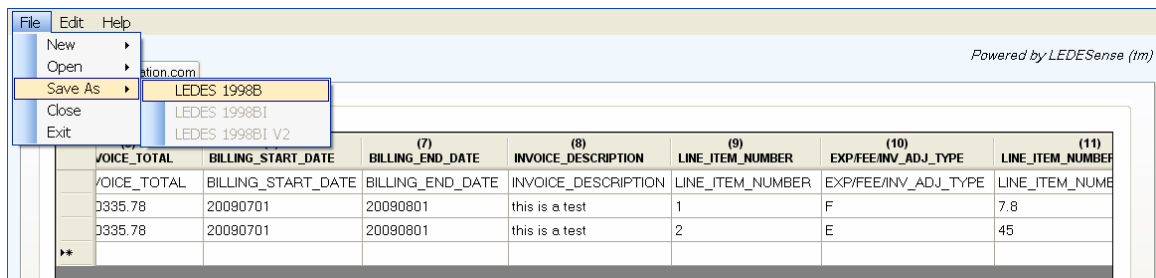
LEDESView will highlight data formatting issues as you enter the data. Mouse over the  to view the error message.



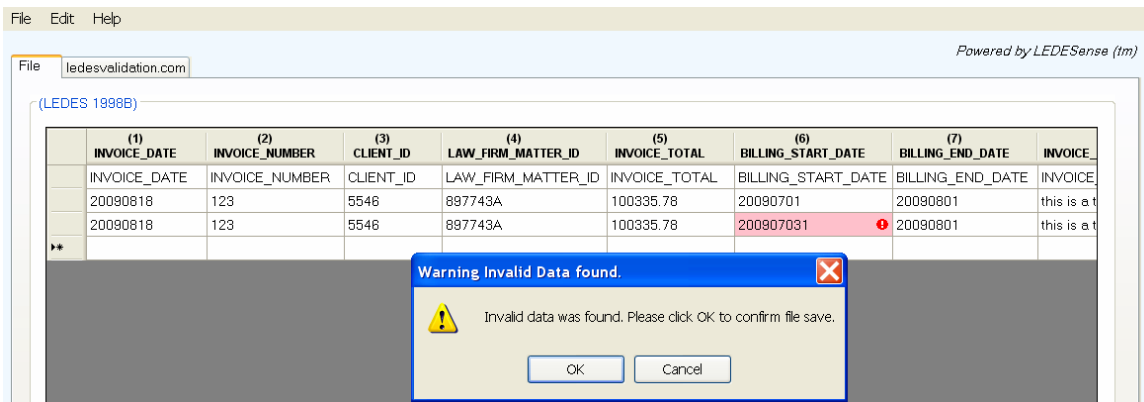
Click on the cell with the erroneous value and make the correction. If the value was entered intentionally, ignore the error and proceed with your data entry.

Saving a New LEDES File

- When you are done entering the invoice data, from the toolbar, select *File -> Save As -> LEDES 1998B*.

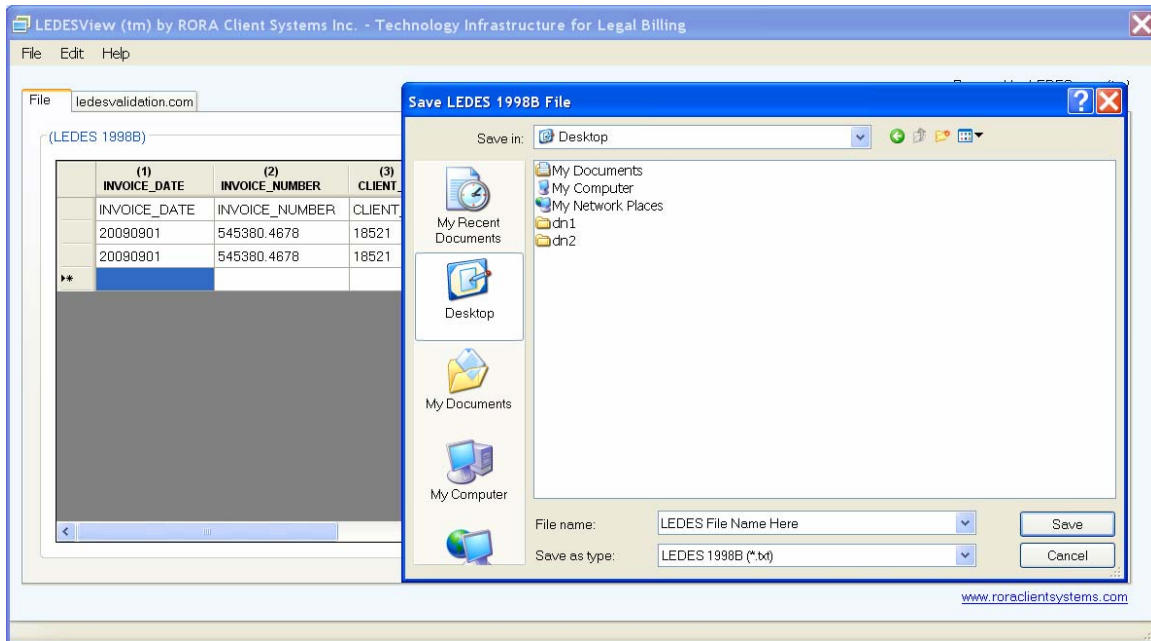


- If LEDESView detects any format error(s) in the LEDES file, a warning message will appear. To go back and correct the error, click *Cancel*, place your cursor in the appropriate cell(s), and correct the error(s). If you are okay to save the LEDES file with the error(s), then click *OK* to proceed. Remember, LEDESView does not validate business rules, only data formatting rules.





6. Enter an appropriate filename and click *Save*.



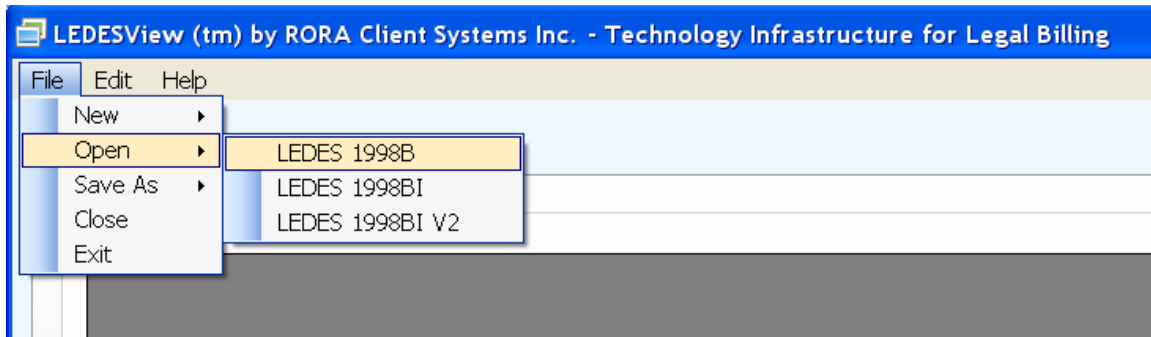
You have successfully created a LEDES 1998B invoice file. Follow these same instructions for LEDES 1998BI and LEDES 1998BI V2, but select the appropriate file format when starting the "New" file creation.



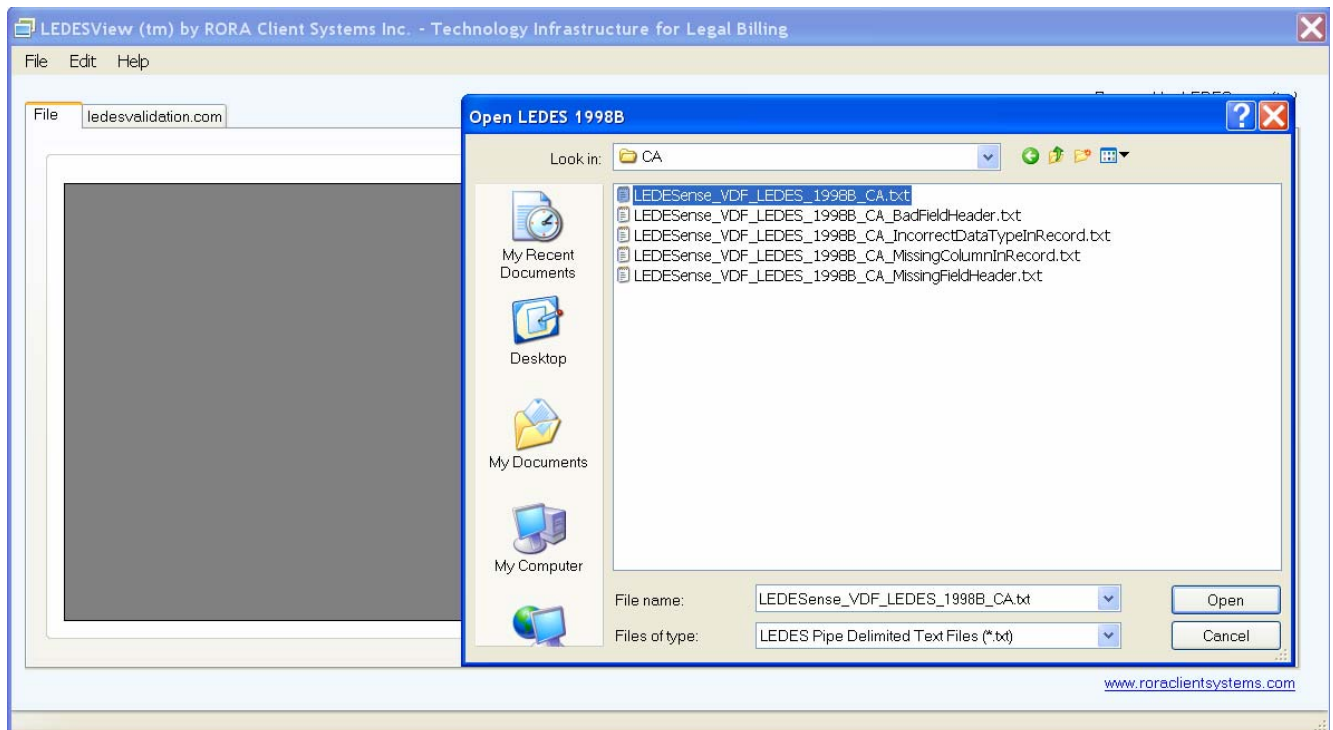
Opening an Existing LEDES 1998B, LEDES 1998 BI, or LEDES 1998 BI V2 File

The following are instructions for opening a LEDES 1998B file.

- 1) From LEDESView, select *File -> Open -> LEDES 1998B*



- 2) Select a file for edit and click *Open*





- 3) Notice the first row is the header row. This row should match the LEDESView column headings. Scroll to the right to make sure the column headers in the file match the column headers in LEDESView.

(1) INVOICE_DATE	(2) INVOICE_NUMBER	(3) CLIENT_ID	(4) LAW_FIRM_MATTER_ID	(5) INVOICE_TOTAL	(6) BILLING_START_DATE	(7) BILLING_END_DATE
20081103	24356	8890	754	4918.71	20081006	20081103
20081103	24356	8890	754	4918.71	20081006	20081103
20081103	24357	8890	760	672	20081006	20081103

- 4) Place your cursor in the grid and make the necessary edits.

Note: After you've completed editing the file, remember to press *Enter* to commit your changes.

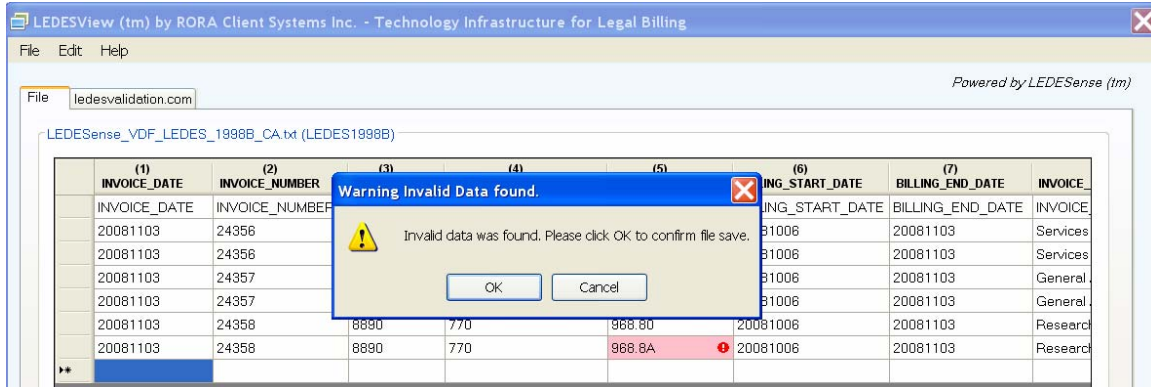
Saving an Edited LEDES File

- 5) When you are done with the edits, save the file by going to the toolbar and selecting *File -> Save As -> LEDES 1998B*

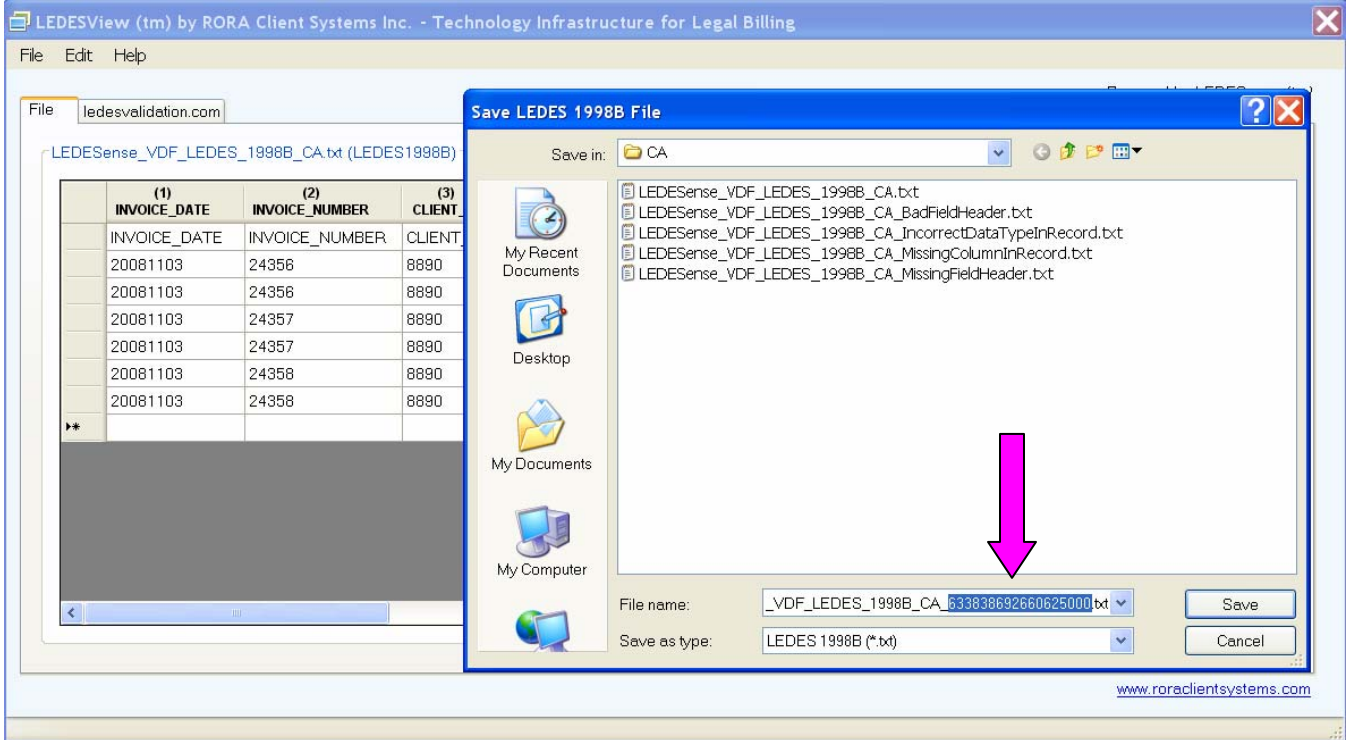
(1) INVOICE_DATE	(2) INVOICE_NUMBER	(3) CLIENT_ID	(4) LAW_FIRM_MATTER_ID	(5) INVOICE_TOTAL	(6) BILLING_START_DATE	(7) BILLING_END_DATE
INVOICE_DATE	INVOICE_NUMBER	CLIENT_ID	LAW_FIRM_MATTER_ID	INVOICE_TOTAL	BILLING_START_DATE	BILLING_END_DATE
20081103	24356	8890	754	4918.71	20081006	20081103
20081103	24356	8890	754	4918.71	20081006	20081103
20081103	24357	8890	760	672	20081006	20081103
20081103	24357	8890	760	672	20081006	20081103
20081103	24358	8890	770	988.80	20081006	20081103
20081103	24358	8890	770	988.8A	20081006	20081103



- 6) If error(s) exist in the file, LEDESView will issue a warning. LEDESView validates data formatting. In this example, the INVOICE_TOTAL column contains a value of "968.8A". INVOICE_TOTAL is a money field and only a numeric value, with up to four decimal places, or blank is allowed.



- 7) To correct the error(s), click *Cancel*; make the appropriate correction(s); press *Enter*, and proceed with saving the file again by selecting *File -> Save As -> LEDES 1998B* from the toolbar.
- 8) Note that for edited files, the LEDESView appends the original filename with a unique ID. This ensures preservation of the original file. But you can also enter a filename of your choice.



You have now successfully edited a LEDES 1998B file. To edit a LEDES 1998BI or LEDES 1998BI V2 file, follow the same instructions, but select the appropriate file type prior to selecting and opening the file.



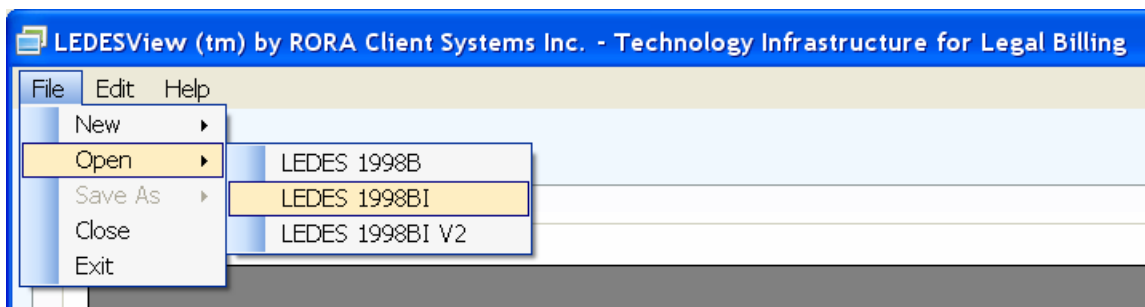
Converting LEDES File Formats

There are many time and billing systems and e-billing systems in the legal industry, but not all time and billing systems can generate all the different LEDES file formats, and not all e-billing systems can ingest them.

LEDESView allows the conversion of one LEDES flat file format to another. In other words, if your time and billing system can produce a LEDES 1998B file, but your client needs the invoice file to be in LEDES 1998BI, LEDESView can assist you with this conversion, and vice versa. This would also apply to the LEDES 1998BI V2 format.

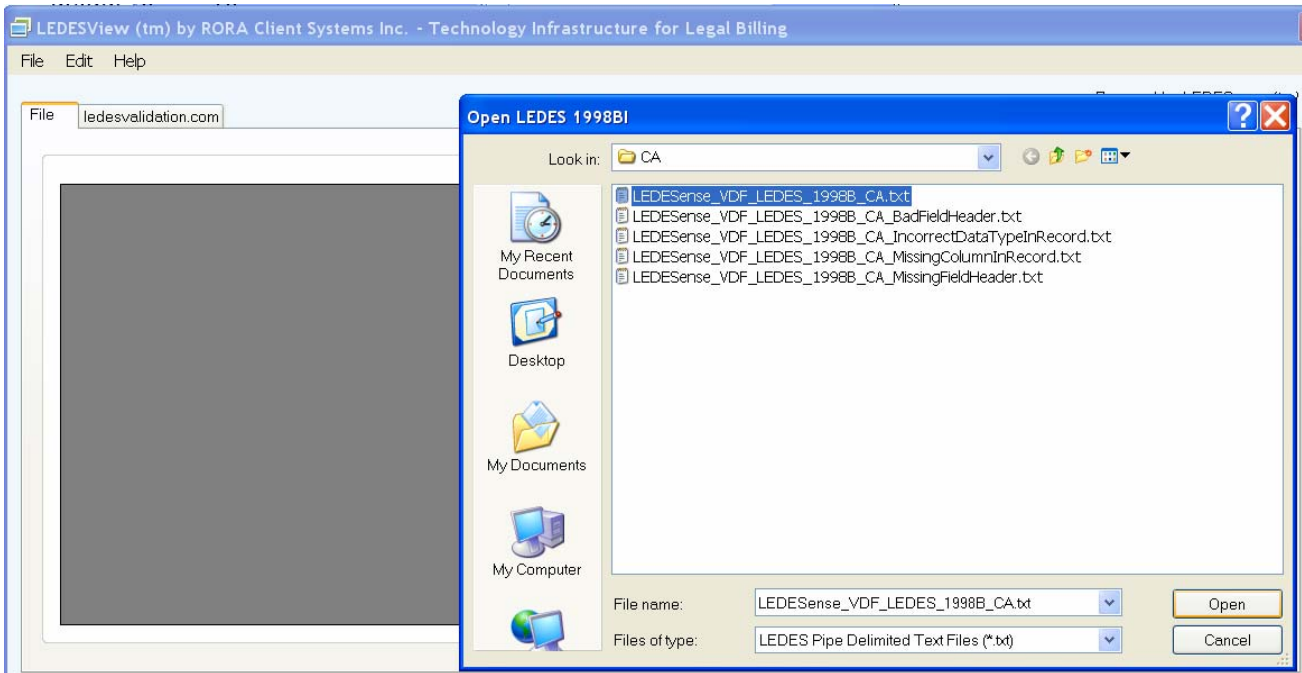
The following are instructions for converting a LEDES 1998B file to a LEDES 1998BI file.

- 1) Open a LEDES 1998B file in the LEDES 1998BI interface by selecting *File* -> *Open* -> *LEDES 1998BI*





2) Select a LEDES 1998 file and click *Open*



3) The differences between a LEDES1998B file and a LEDES1998BI file are the 26 fields appended to the end of a LEDES1998B file to form a LEDES1998BI file.

Note the contents of the LEDES1998B file ends at column 24 (CLIENT_MATTER_ID).

File | ledesvalidation.com

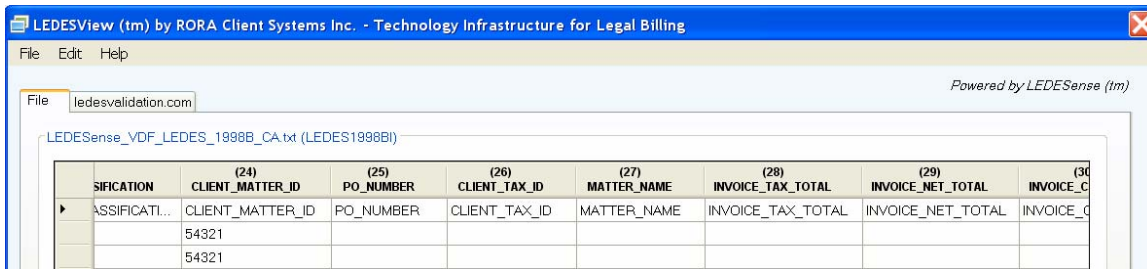
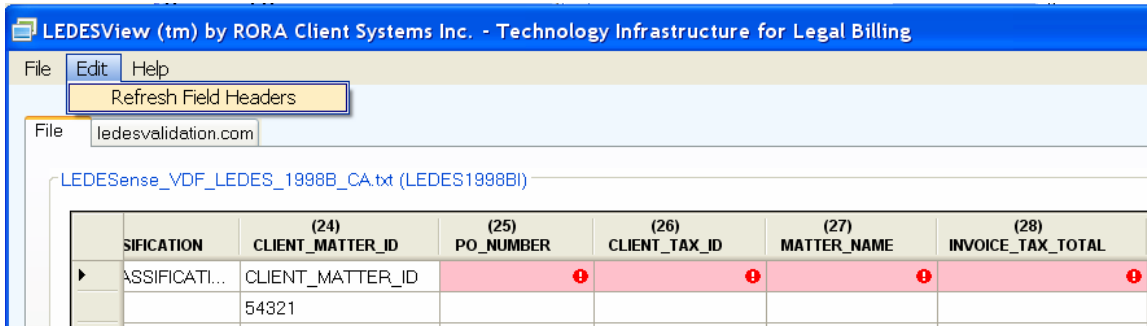
LEDESense_VDF_LEDES_1998B_CA.txt (LEDES1998BI)

	(22)	(23)	(24)	(25)	(26)	(27)
	KEEPER_NAME	TIMEKEEPER_CLASSIFICATION	CLIENT_MATTER_ID	PO_NUMBER	CLIENT_TAX_ID	MATTER_NAME
▶	KEEPER_NAME	TIMEKEEPER_CLASSIFICATI...	CLIENT_MATTER_ID			
	ca, Rora	PT	54321			
			54321			
	ian, Donald	OC	54330			
			54330			

Column 25 header must be PO_NUMBER



- Now the actual conversion begins. First, the column headers must be made to match the LEDESView column headers. Rather than typing it into the grid, go to the toolbar and select *Edit -> Refresh Field Headers*



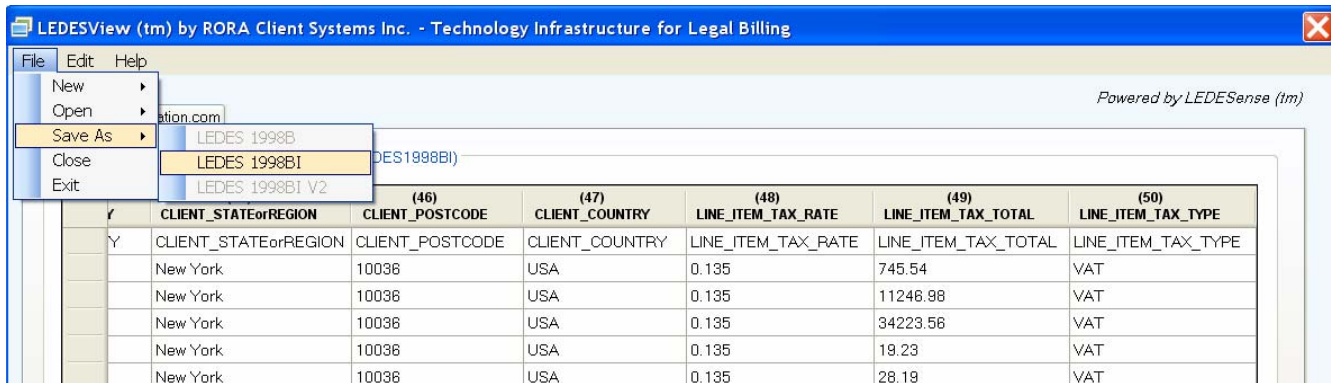
Now the column headers are in sync.

- If no other data is required in the invoice file, go ahead and save the file as a LEDES 1998BI file (see below for instructions).



- 6) If LEDES 1998BI specific data is required, place your cursor in the grid and enter the necessary data values. Note, for most jurisdictions outside the US, Client_ Name must be the actual legal entity name of the service recipient. LEDES1998BI also accommodates Law Firm and Client addresses, and one consumption tax per line item.

Saving a Converted LEDES File



- 7) Once all edits are made and *Enter* is pressed to commit the edits, go to the toolbar and select *Save As -> LEDES 1998BI*. Either allow LEDESView to assign a filename, or enter an appropriate filename and click Save.

Your LEDES 1998B file has now been converted to a LEDES 1998BI file. Repeat these instructions to convert any LEDES 1998B, LEDES 1998BI, or LEDES 1998BI V2.


Note that the LEDES 1998BI file has 26 more fields than the LEDES 1998B file. All 26 of these fields are appended at the end of the LEDES 1998B file.

The LEDES 1998BI V2 file has 2 more fields than the LEDES 1998BI file. These fields are appended to the end of the LEDES 1998BI file.

When converting a LEDES 1998BI file to a LEDES 1998B file, you are essentially eliminating the data in the appended 26 fields of LEDES 1998BI. For these LEDES formats, this is always true when converting to a file format with lesser number of fields.



Helpful Hints

- ✓ Use the Tab key to move across the form. Shift + Tab to move back.
- ✓ Note that all date fields require the YYYYMMDD format.
- ✓ Note that all money fields must be numeric, with up to 4 decimal places, or blank.
- ✓ Mouse over the  for the error message.
- ✓ To proceed to the next row, continue to use the Tab key.
- ✓ Before saving the file, press the Enter key to commit the last row.
- ✓ Click on the LEDESView column headings to sort the records
- ✓ If values in a cell are cutoff from viewing, mouse over that cell to see the complete entry.
- ✓ When converting files, be sure to go to the toolbar and select *Edit -> Refresh Field Headers* to ensure consistent column headers.

Known Issues:

This section lists some of the known issues with this product. Note that this product has limited functionality and features and is not eligible for free upgrades. Bug fixes however are included in this price.

- 1) The *Cut*, *Copy*, and *Paste* commands are not available.
- 2) When the last value is entered into the LEDESView grid, press Enter to commit the value.
- 3) Column width cannot be adjusted.