



**onelaw**

## WIP REPORTING

OneLaw practice management systems are designed to take the stress out of the traditionally time-consuming task of WIP reporting – The OneLaw Team

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## About

At OneLaw, we know you have bigger fish to fry than worrying about WIP reporting. Therefore, we have developed a system designed to maximise your practice's efficiency by automating traditionally time-consuming tasks. With our dynamic practice management system you can easily generate a variety of extensive and accurate WIP reports at the click of a button.

This manual is designed to help you to navigate the software and quickly become an expert on all things WIP reporting, freeing up your time to focus on the bigger tasks at hand.

## Finding reports

1. Home tab
2. Report list
3. Management reports
  - a. All reports can be opened as PDF or export to Word/Excel

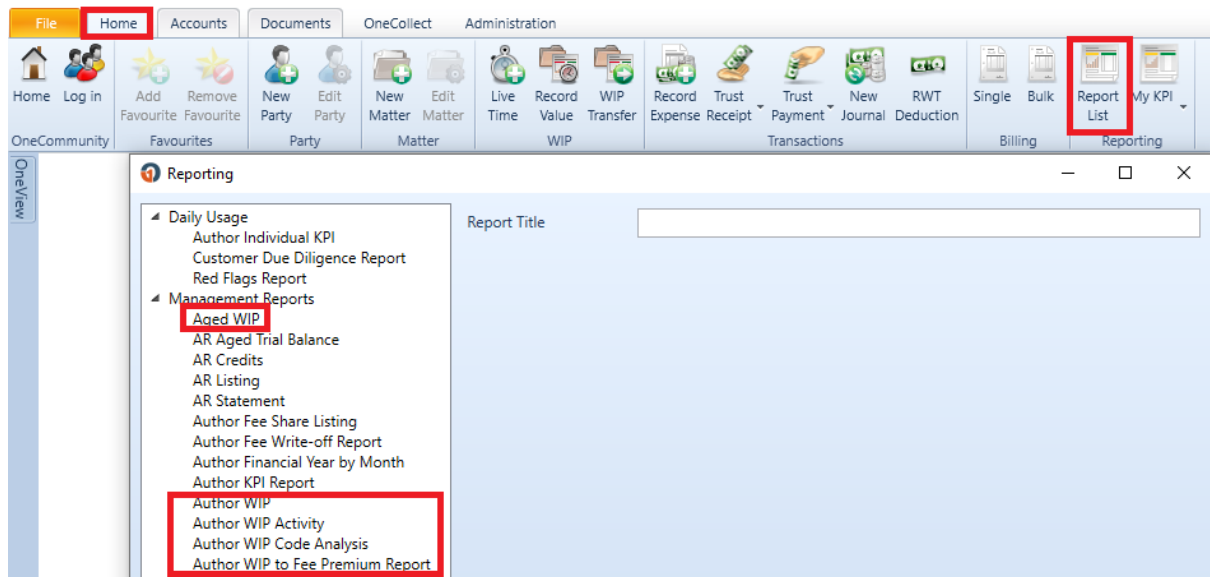
The screenshot shows the 'Reporting' window with the following configuration:

- Report Title:** Aged WIP
- Trust Ledger:** BNZ Trust A/c
- Author Selection:**
  - Author role: Client Author
  - for Author: <All>
- Author Type Grouping:**
  - None
  - Team
  - Office
- Format:**
  - PDF
  - Word
  - Excel
- Buttons:** Show Report, Close

The left sidebar contains a list of reports under 'Management Reports', with 'Aged WIP' highlighted. Other reports include AR Aged Trial Balance, AR Credits, AR Listing, AR Statement, Author Fee Share Listing, Author Fee Write-off Report, Author Financial Year by Month, Author KPI Report, Author WIP, Author WIP Activity, Author WIP Code Analysis, Author WIP to Fee Premium Report, Author Write-offs By Reason Report, Author Write-offs Report, Client Write-off Report, Deeds, Fee Delegation Report, Fees by Fee Type Report, Firm Trust Ledger Report, Firm's KPI, Float & Debit Balances Control Report, General Ledger Export Report, GST Accruals Report, IBD Interest Activity Report, IBD Ledger Balance Report, IBD Ledger Transaction Report, Ledger Balance Report, Matter Balances Report, New Clients & Matters Report, Stale Matters Report, Top Billed Clients, Trust Balance Management Report, Trust Transactions Report, Unbilled Trust Debit Balances, Unpresented Cheques, Archived Matters Report, Matter Bill Requisition, Matter Disbursements, Matter Expenses, Matter Expenses by Type, Matter IBD, Matter Trust Transactions, Matter WIP, Matter WIP by WIP Code, Matter WIP Summary, and Reporting Statement.

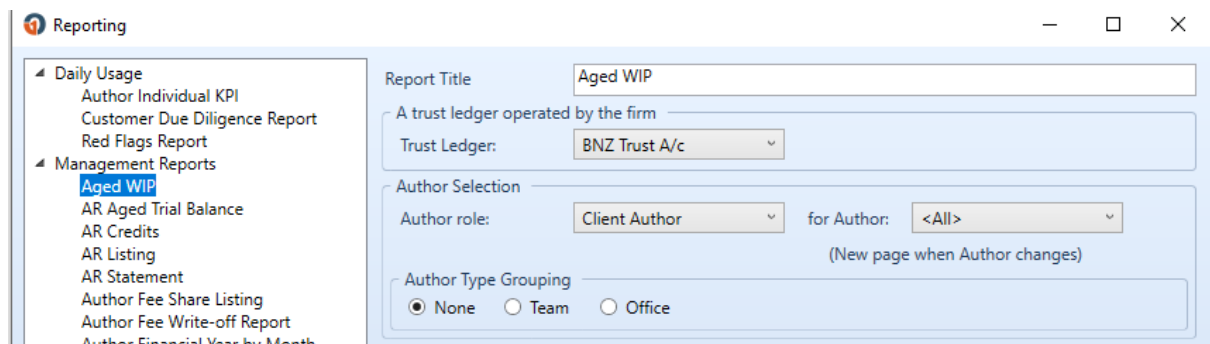
## Report types

- **Aged WIP – authors WIP by client/matter**
- **Author WIP – recorded authors WIP for a period**
- **Author WIP Activity – WIP in dollars**
- **Author WIP Code Analysis – WIP in WIP codes recorded**
- **Author WIP to Fee Premium Report – WIP recorded to billed fees**



## Generating aged WIP reports

1. Select 'Aged WIP' under management reports



## 2. Select author role

Reporting

Report Title: Aged WIP

A trust ledger operated by the firm

Trust Ledger: BNZ Trust A/c

Author Selection

Author role: Client Author (dropdown menu open with options: Client Author, Matter Author, Work Author)

for Author: <All>

(New page when Author changes)

Author Type Grouping:  None  Team

Navigation menu: Daily Usage (Author Individual KPI, Customer Due Diligence Report, Red Flags Report), Management Reports (Aged WIP, AR Aged Trial Balance, AR Credits, AR Listing, AR Statement, Author Fee Share Listing, Author Fee Write-off Report, Author Financial Year by Month, Author KPI Report)

## 3. Select author - ALL or drop down for list

Reporting

Report Title: Aged WIP

A trust ledger operated by the firm

Trust Ledger: BNZ Trust A/c

Author Selection

Author role: Client Author

for Author: <All> (dropdown menu open)

(New page when Author changes)

Author Type Grouping:  None  Team  Office

Navigation menu: Daily Usage (Author Individual KPI, Customer Due Diligence Report, Red Flags Report), Management Reports (Aged WIP, AR Aged Trial Balance, AR Credits, AR Listing, AR Statement, Author Fee Share Listing, Author Fee Write-off Report)

## 4. Select author grouping

Reporting

Report Title: Aged WIP

A trust ledger operated by the firm

Trust Ledger: BNZ Trust A/c

Author Selection

Author role: Client Author

for Author: <All>

(New page when Author changes)

Author Type Grouping:  None  Team  Office

Navigation menu: Daily Usage (Author Individual KPI, Customer Due Diligence Report, Red Flags Report), Management Reports (Aged WIP, AR Aged Trial Balance, AR Credits, AR Listing, AR Statement, Author Fee Share Listing, Author Fee Write-off Report)

Report shows:

- **Client number & name**
- **Matter number and description**
- **Author's WIP on matters**
- **Total WIP per matter**
- **Month Recorded**
- **Totals**

Example of aged WIP report:

**Aged WIP**

Report Selections : Trust Account: BNZ Trust A/c; Author role: Client Author; Author: MT; Author type grouping: None

Client/Matter	Author	WIP		Month Recorded			
		Author	Matter	Feb - Jan	Dec - Nov	Oct - Sep	Aug - Older
<b>MT Thompson, Michael</b>							
201660 Berry, Roger Mr	MT	\$ 0.00	\$ 1,640.00	\$ 1,590.00	\$ 50.00	\$ 0.00	\$ 0.00
1 The Berry Patch	NB	0.00	630.00	630.00	0.00	0.00	0.00
2 What is a berry	NB	0.00	360.00	360.00	0.00	0.00	0.00
4 Little Blue Berry	NB	0.00	650.00	600.00	50.00	0.00	0.00
<b>Total - MT Thompson, Michael Clients</b>		<b>\$ 0.00</b>	<b>\$ 1,640.00</b>	<b>\$ 1,590.00</b>	<b>\$ 50.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>

### Author WIP report

- A great report if you wish to see an author's WIP for a day/week/month

1. Select author WIP in management reports list

2. Specifying client and matter is optional, these fields may be left blank

### 3. Select author

The screenshot shows the 'Reporting' window with the 'Author Selector' dropdown menu highlighted in red. The 'Author' field is currently empty. The 'Reporting Period' is set to February 2019, and the 'Bill Status Selector' is set to 'Billed and unbilled'.

### 4. Navigate to reporting period and use either of the drop-down boxes to select month or specific dates

The screenshot shows the 'Reporting' window with the 'Reporting Period' section highlighted in red. The 'Month' radio button is selected, and the month is set to 'February' and the year to '2019'. The 'From' and 'To' date pickers are also visible.

### 5. Select the appropriate option under bill status selector

The screenshot shows the 'Reporting' window with the 'Bill Status Selector' dropdown menu highlighted in red. The dropdown menu is open, showing three options: 'Billed and unbilled', 'Billed only', and 'Unbilled only'. The 'Author' field is now populated with 'MT Michael Thomp'.

## Example of Author WIP Report

### Author WIP

Report Selections : Author: JMC; Reporting Period: 01 Oct 2018 to 28 Feb 2019; Bill Status: Billed and unbilled

Date	Author	Account	WIP Code	File Note	Units	WIP Value	Billed
12/10/2018	JMC	201625.6	MI	Work done for you		200.00	INV74927
12/10/2018	JMC	201660.2	MI	Work done		300.00	INV74925
27/10/2018	JMC	201668.1	AS	Affidavit Swearing	9	270.00	
29/10/2018	JMC	201718.2	DR	Drafting -		250.00	
08/12/2018	JMC	201636.3	DR	Drafting		300.00	INV74940
10/12/2018	JMC	201616.27	DR	Drafting		300.00	INV74936
10/12/2018	JMC	201616.28	RI	Receiving Instructions sfgh fgsh		250.00	INV74937
14/12/2018	JMC	201720.2	AO	Attendance out with		300.00	INV74941
04/01/2019	JMC	201651.4	MI	Final bill for advice given		1,000.00	INV74951
10/01/2019	JMC	201700.1	DR	Drafting	20	600.00	INV74964
01/02/2019	JMC	201660.1	LI		12	360.00	
21/02/2019	JMC	201644.6	DR	Drafting	2	80.00	
21/02/2019	JMC	201644.6	RI	Receiving Instructions	7	280.00	
28/02/2019	JMC	201660.1	AS	Affidavit Swearing	9	270.00	
28/02/2019	JMC	201660.2	DR	Drafting	12	360.00	
28/02/2019	JMC	201660.4	PE	Perusal	20	600.00	
<b>Totals</b>					<b>91</b>	<b>\$5,720.00</b>	

## Author WIP Activity

- Report on all authors for a month or period

Reporting

Report Title: Author WIP Activity

Reporting Period

Month: February 2019

From: Select a date To: Select a date

Author Type Grouping

None  Team  Office

Page break on group change

## Example of Author WIP Activity Report

### Author WIP Activity

Report Selections : Reporting Period: January 2019; Author type grouping: None

Author	WIP Activity for Period				Fees from WIP Billed		Average 12 Mth	Expected
	Opening	Added	Billed	Closing	Fees	Premium	Recovery	Recovery
ARE - Aimee Earing	152	0	0	152	0	0	-357%	-543
AMG - Andrew Gum	187	0	0	187	0	0	0%	0
BC - Ben Cool	126,657	0	0	126,657	0	0	4%	4,806
BN - Ben Noname	300	0	0	300	0	0	106%	317
BMN - Brian Nickson	165	0	0	165	0	0	-4536%	-7,485
CYD - Chris Davidson	53	0	0	53	0	0		53

Report shows:

- **Reports on all authors, opening WIP balance**
- **Added and billed WIP**
- **Closing balance**
- **Fees from WIP billed – fees and premium**
- **Average 12 month recovery – as a percentage**
- **Expected recovery in \$**

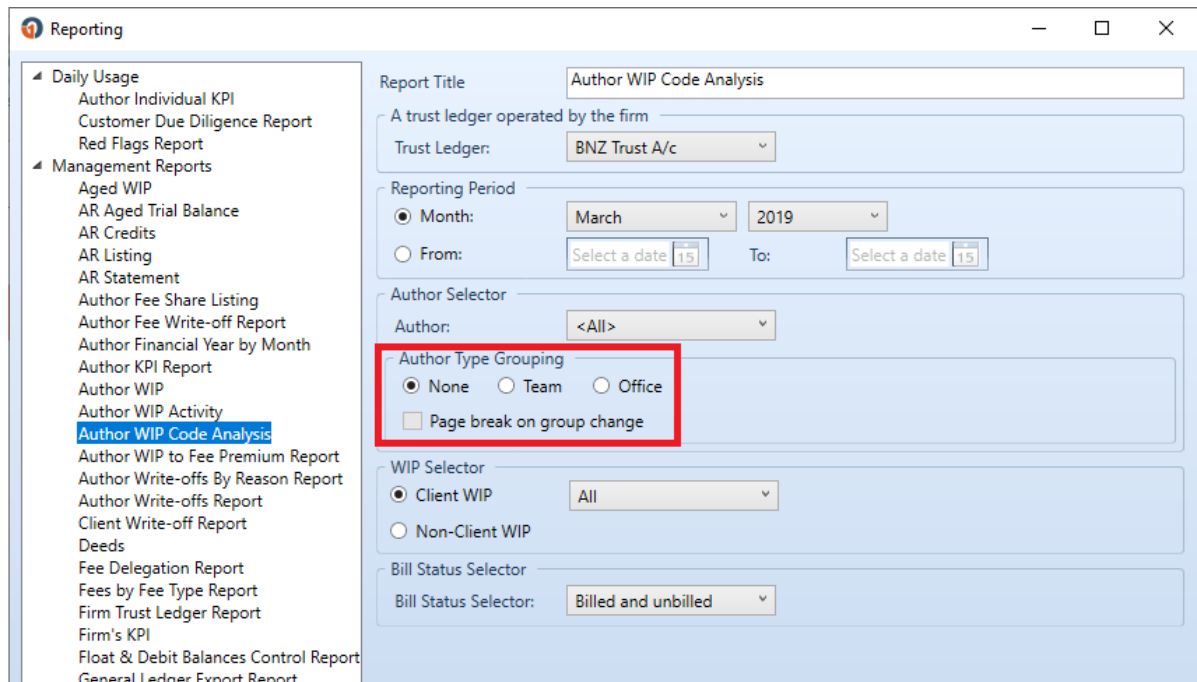
## Author WIP Code Analysis

1. Select 'Author WIP Code Analysis' in list
2. Reporting period – select month or date range
3. Author selector – 'ALL' or drop down to select

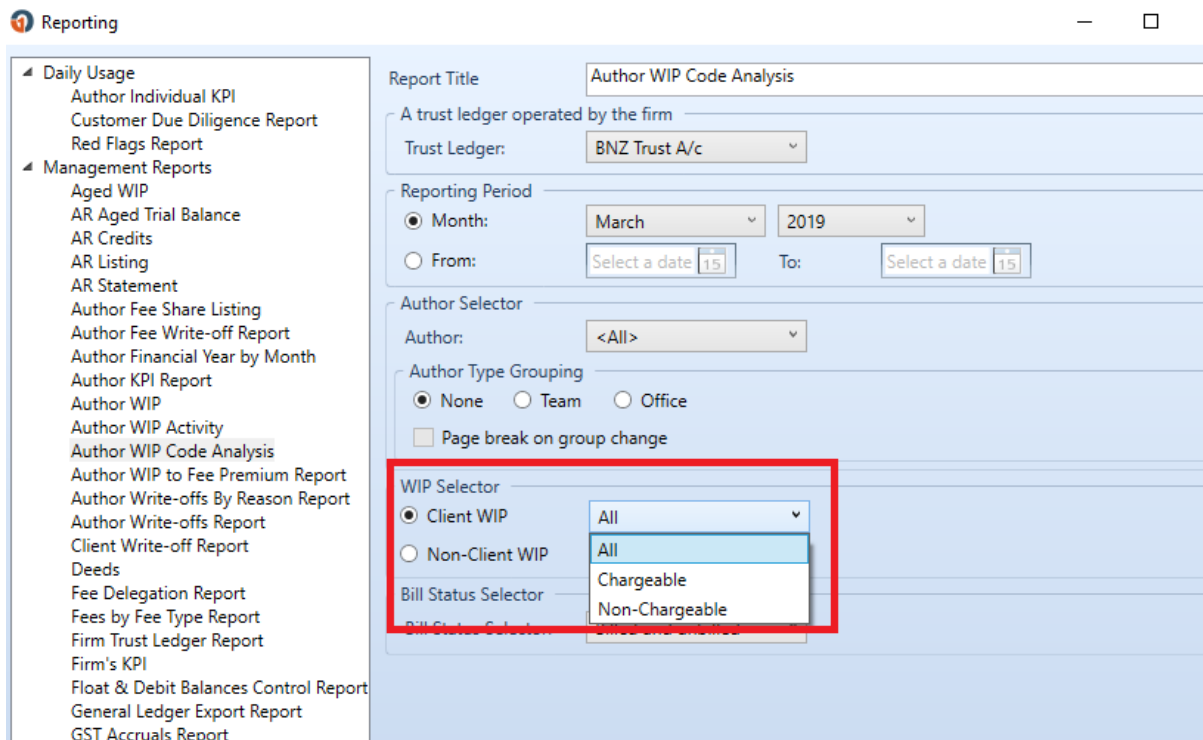
The screenshot shows the 'Reporting' window with the following configuration:

- Report Title:** Author WIP Code Analysis
- Trust Ledger:** BNZ Trust A/c
- Reporting Period:**
  - Month: March 2019
  - From: [Select a date 15] To: [Select a date 15]
- Author Selector:** <All>
- Author Type Grouping:**
  - None
  - Team
  - Office
- Page break on group change
- WIP Selector:**
  - Client WIP: All
  - Non-Client WIP
- Bill Status Selector:** Billed and unbilled

4. Author type grouping – select ‘None’, ‘Team’ or ‘Office’



5. WIP selector – select ‘Client WIP’ or ‘Non-Client WIP’ then ‘All’, ‘Chargeable’ or ‘Non-Chargeable’



## 6. Bill Status Selector – select what you require

Reporting

Report Title: Author WIP Code Analysis

A trust ledger operated by the firm

Trust Ledger: BNZ Trust A/c

Reporting Period

Month: March 2019

From: Select a date To: Select a date

Author Selector

Author: <All>

Author Type Grouping

None  Team  Office

Page break on group change

WIP Selector

Client WIP All

Non-Client WIP

Bill Status Selector

Bill Status Selector: Billed and unbilled

Billed only

Unbilled only

Billed and unbilled

## Example of Author WIP Code Analysis Report

- Report shows Authors – WIP Code, Chargeable/Non-Chargeable, Units, Value WIP and Total WIP

### Author WIP Code Analysis

Report Selections : Trust Account: BNZ Trust A/c; Reporting Period: February 2019; Author: <ALL>; Author type grouping: None; WIP Sector: Client WIP; Client WIP Type: All; Bill Status: Billed and unbilled

WIP		Time WIP			Value WIP		All WIP		
Code	Description	Chargeable	Count	Units	Value	Count	Value	Count	Value
<b>BMB - Brad Bishop</b>									
DR	Drafting	Y	-	-	-	2	85.30	2	85.30
<b>Total BMB - Brad Bishop</b>			-	-	-	2	85.30	2	85.30
<b>JMC - Jo Cleminson</b>									
AS	Affidavit Swearing	Y	1	9	270.00	-	-	1	270.00
DR	Drafting	Y	2	14	440.00	-	-	2	440.00
LI	Letter In	Y	1	12	360.00	-	-	1	360.00
PE	Perusal	Y	1	20	600.00	-	-	1	600.00
RI	Receiving Instructions	Y	1	7	280.00	-	-	1	280.00
<b>Total JMC - Jo Cleminson</b>			6	62	1,950.00	-	-	6	1,950.00
<b>MT - Michael Thompson</b>									
AO	Attendance Out	Y	1	17	595.00	-	-	1	595.00
<b>Total MT - Michael Thompson</b>			1	17	595.00	-	-	1	595.00
<b>NB - Nadine Banfield</b>									
AI	Attendance In	Y	2	19	2,300.00	1	50.00	3	2,350.00
AO	Attendance Out	Y	1	7	1,400.00	-	-	1	1,400.00
AS	Affidavit Swearing	Y	1	2	100.00	-	-	1	100.00
CO	Court	Y	1	18	900.00	1	500.00	2	1,400.00
LR	Legal Research	Y	-	-	-	1	300.00	1	300.00
MI	Miscellaneous	Y	4	36	3,600.00	2	230.05	6	3,830.05
<b>Total NB - Nadine Banfield</b>			9	82	8,300.00	5	1,080.05	14	9,380.05
<b>Total</b>			16	161	10,845.00	7	1,165.35	23	12,010.35

WIP Code totals for above listed authors					
			Count	Units	Value
AI	Attendance In		3	19	2,350.00

## Author WIP to Fee Premium Report

1. Select 'Author WIP to Fee Premium Report'
2. Select 'Author – All' or drop down to select
3. Reporting period – month or date range

The screenshot shows the 'Reporting' window with the following configuration:

- Report Title:** Author WIP to Fee Premium Report
- Trust Ledger:** BNZ Trust A/c
- Author Selection:** <All>
- Reporting Period:**
  - Month: March 2019
  - From: [Select a date] To: [Select a date]

## Example of Author WIP to Fee Premium Report

### Author WIP to Fee Premium Report

Report Selections : Trust Account: BNZ Trust A/c; Authors: All; Reporting Period: February 2019

Account	Client	Matter	Matter Author	Bill Date	Bill Ref	Billed WIP	Fee Share	Premium \$	Premium %
<b>Author: NB - Nadine Banfield</b>									
120898.10	Tall Tree Stud Ltd	The Chopper	JMG	01/02/2019	INV74965	\$500.00	\$500.00	\$0.00	0%
201616.32	The Hip Hop Co Ltd	Sparkle Feet	NB	05/02/2019	INV74966	\$230.00	\$230.00	\$0.00	0%
201616.33	The Hip Hop Co Ltd	The White Glove	NB	06/02/2019	INV74967	\$250.00	\$250.00	\$0.00	0%
201668.1	Boots, Fuss in Mr	The Story Book Company	NB	20/02/2019	INV74970	\$600.00	\$344.83	(\$255.17)	-43%
201659.1	Ground Control	Starship Enterprise	NB	20/02/2019	INV74971	\$300.00	\$260.87	(\$39.13)	-13%
201667.1	Mr Humpty Dumpty & Miss Mary Muffet	The Egg that Cracked	NB	28/02/2019	INV74968	\$100.00	\$300.00	\$200.00	200%
<b>Totals for NB - Nadine Banfield</b>			<b>Bills: 6</b>			<b>\$1,980.00</b>	<b>\$1,885.70</b>	<b>(\$94.30)</b>	<b>-5%</b>

Report shows:

- **Client and matter**
- **Matter author**
- **Bill date**
- **Billed WIP**
- **Fee share**
- **Premium in \$**
- **Premium in %**