

Zenas

Case Management for Sole Practitioners with WordPerfect Office

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The Zenas Case Management System

Make every effort to send Zenas the lawyer and Apollos on their way, and see that they lack nothing.

– Titus 3:13

I. Introduction

A. About this system

This distribution provides a case management system for a solo lawyer using Quattro Pro (QP), WordPerfect (WP), and other tools of the WordPerfect Office suite, along with several other freeware tools available on the internet. This system serves my purposes as a lawyer in Georgia handling appeals and similar issues in civil litigation, mostly including personal injury litigation. Since the user may wish to modify it in various ways to serve other purposes, this document includes instructions on how this system works and how to modify it.

Evolving work in progress. This spreadsheet has been a work in progress for many years. Some features could doubtlessly be improved, and others could be added. If you have a suggestion for improvements, please [e-mail them to me](#). Some parts have been re-written during the course of writing this documentation, and though I have tried to update this paper to reflect those changes, it is possible that there will be some minor discrepancies between this paper and the spreadsheet. A full log of changes in the program is maintained in [Logs:AI..AJ](#). The most current versions of these documents will be found at <http://corklaw.com/Tech/Zenas/>.

Public Domain. This file and the accompanying files are placed in the public domain for the benefit of lawyers and as examples to those who want to write spreadsheet applications. They are offered **AS IS**, without warranties of any sort. They work for me, but I make no guarantees about whether or how they will work for you. Use them at your own risk, and modify them at your own risk. I offer them at no charge, and for whatever value you may find in them.

You are welcome to revise this spreadsheet and accompanying materials to suit your needs. However, I strongly recommend that you (a) keep the original documents unmodified and (b) backup working versions of each before you make any substantial modifications. You should become familiar with the programming language and structure of these materials before attempting to alter them. As programmers know, a change in one place in the program may necessitate changes in various other places. QP is also somewhat finicky about structural changes.

CareWare. If you find this distribution to be of benefit, I simply ask that you remember the poor (Gal. 2:10) and consider giving to appropriate charitable organizations for their relief.

B. Contents of this Distribution

The files currently available online for this program are:

- **Zenas.PDF** - This documentation file.
- **Zenas.QPW** - the Quattro Pro notebook that functions as the case management system at the center of the rest of these files. I revise the notebook from time to time and usually upload a current version each weekend. Information about the revisions is stored in columns AI and AJ on the [Logs](#) page.
- **TitlelogViewer.QPW** - the Quattro Pro notebook for viewing time records generated by Titlelog.
- **ZenasMacros.Zip** A zip file of PerfectScript macros containing:
 - ZenasClientFiles.wcm** - Determines the full path and name of the client's folder
 - ZenasDiaryTime.wcm** - Copies Zenas TimeSheet to the bottom of a WP Diary file
 - ZenasFileFolders.wcm** - Creates the client folder and default subfolders when file is opened
 - ZenasMailMerge.wcm** - Generates mailing envelopes
 - ZenasMerger.wcm** - The main document assembly macro
 - ZenasMindMap.wcm** - Opens (after creating, if necessary) a Freeplane mindmap, and adds filed in client folder to it. Serves as a file manager as well as a mind map
 - ZenasPhoneNo.wcm** - Given a phone number, it checks Zenas data to see if the caller is in the system
 - ZenasPickActor.wcm** - Allows user to pick a particular person in the current case
 - ZenasPickCase.wcm** - Allows user to choose case from database by name
 - ZenasPickList.wcm** - Allows programmer to set a variable list of items for the user to select
 - ZenasPickListedCases.wcm** - Allows user to choose particular case after a search narrows the list of cases (typically only the open cases)
 - ZenasPickPerson.wcm** - Allows user to pick a particular person in the database
 - ZenasShellExecute.wcm** - Launches files as if clicked from Windows explorer

ZenasShowCase.wcm - Shows details on a particular case from the Case#

ZenasShowPerson.wcm - Shows details on a particular person from the PNo

- **ZenasForms.Zip** - a zip file of templates, mostly WordPerfect WPT files

BoxSheet.wpt - basic case information for a sheet to affix to a banker's box

Caption.wpt - Legal pleading form for Georgia trial courts

Caption_NDGa.wpt - Legal pleading for the Northern District of Georgia (federal)

CertificateOfService.wpt - form for a certificate of service

ClosedFileSheet.wpt - information on a file at time of closing

CoverLetterClerk.wpt - a cover letter to the clerk of the court

Envelope.frm - a blank envelope into which one or more addresses can be merged

Envelope.wpt - a blank envelope into which one or more addresses can be merged

FileLabels.wpt - a 1x7 set of labels for file folders

FileSheet.wpt - information on a file at time of file opening

Invoice.wpt - for compiling an invoice statement to clients

OperatingCheck.wpt - The form for checks on my operating account

TrustCheck.wpt - The form for checks on my operating account

Case_Template.mm - Freeplane mindmap default template for cases.

standard.mm - Freeplane mindmap that has default settings for all other mindmaps.

C. Programs Used

Corel WordPerfect Office.

Zenas.qpw was initially written using **Corel's Quattro Pro 11**, and revised under Quattro Pro X4, X5, X6, and X7. Most files (forms and macros) in this distribution are written in **WordPerfect**. Images in this text are screen shots taken with Alt+Printscreen, and these were then clipped and blurred using Corel's **Presentations** before incorporation into this manual.

This manual contains some information on how to use Quattro Pro. For more information on QP, WP or other software in this Office suite, see the tutorials and help files for those programs. In addition, help is also available in the Corel newsgroups on Quattro Pro at cnews.corel.com, at Corel's [OfficeCommunity.com](http://www.officecommunity.com), and at various forums of WordPerfect Universe at <http://www.wpuniverse.com/>, particularly the "Other WordPerfect Office Programs," "How do I?", and "Macros and Merges" forums.

External Programs.

Zenas is written to work with an external mindmap and a time logger, both freeware. For the mindmap, I have used [Freemind](#) and now use [Freeplane](#). Both function similarly; Freeplane has a few additional features, and in particular, it works with a PerfectScript macro Zenas uses; whereas Freemind may crash if the mindmap is large. Upon starting this macro, Zenas gives the user the ability to choose to add all new files in the client's folder to the mindmap. In this way, the mindmap serves as a file manager. For a brief overview, see my [short introduction to the use of a mind map in a law practice](#).

For the time logger, I use [Titlelog](#). I use this mainly to reconstruct what I did during the day, so that I can correctly attribute my time in Zenas's TimeSheet.

D. Troubleshooting

Macro seems to hang on first use.

I have noticed that the first time I click a button that plays a PerfectScript macro, the program and indeed my entire system appears to hang for 15 to 30 seconds, though afterward, the same button performed with the normal expected speed.

Cause: One cause of this phenomenon is that the WordPerfect PrintServer has not been loaded, and it takes that period of time to load. The PrintServer is loaded automatically when WordPerfect is loaded and when PerfectScript is loaded, but not when Quattro Pro is loaded. When a PerfectScript macro is invoked, the 15-30 second delay can occur while the PrintServer is being loaded. (The same will happen on the first loading of WordPerfect.)

Solution: If that is the problem, it can be avoided in QP by making sure that WordPerfect has already been loaded. If the user wishes to solve the problem for both WP and QP, one solution would be to put in one's "Startup" folder a link to a WP macro that simply beeps, as discussed at [WordPerfect Universe](#).

Other troubleshooting tips will be added later, as the need becomes apparent to me.

II. How to use the Zenas.qpw Notebook

A. Read this before starting

You can begin using Zenas.qpw right away as a demo to test the program with the dummy data that is pre-loaded. However, to use it in your office setting with real cases, you will need to make two categories of adjustments, which are detailed below.

First, you will need to enter data on your cases into it. If you already have some data stored in some other program, you may wish to import it into Zenas. Guidelines on how to set up your data for the easiest importation will be given below.

Second, you will need to bring your file locations into harmony with Zenas's default locations. That will require either that you move your file locations, or change the places where Zenas looks for them, or some combination of both.

You may need or desire to change Zenas in other ways. Instructions for doing so will be given in Part IV of this paper.

1. Importing your case data into Zenas

These are guidelines for the creation of a text file that Zenas can import and then importing it.

Phase 1: Exporting to a text file.

The ideal will be to create a text file with the same sequence of data as the columns for data in Zenas. For example, in Zenas's database for attorney time, the sequence is (1) Date, (2) (starting) Time, (3) Case#, (4) Hours, (5) Work (text), and (6) Status. A suitable text file would have numeric entries for each of these columns except the fifth one, which would have a description of the work performed enclosed. In order to let QP know where to break the line into separate cells. This calls for a character that is not used in the source data. I usually use } to do this. Other good choices might be ^ or ~, if they are not used in your text. A line from such a text file might look like this.

40878}0.75}1234}1.23}Draft complaint, research jurisdiction}0

Using this method involves a few additional steps, but it does cleanly import the data.

Not all programs allow such flexibility in exporting data. Experimentation may be necessary to find the easiest way to import the data.

Dates and times can be especially tricky. The ideal is to convert dates to numbers, with day 0 representing December 30, 1899, day 1 as December 31,

1899, day 2 as January 1, 1900, and so forth, which is how QP understands them. Times are fractional parts of days, so that Midnight is 0.0, 6:00AM is 0.25, noon is 0.5, 6:00PM is 0.75, and so forth. Your program may not be able to do this, however. If not, the next best is to export dates with slashes and quotes, such as “12/01/2011”,¹ and time such as “10:00AM”. Such entries import directly as text into Zenas, but as soon as you edit them, they become numbers. This can be done, apparently, by selecting the new data and copying it (**Ctrl+C**), then pasting it (**Ctrl+V**) to the same location.

Phase 2: Importing the text file into Zenas.

These following steps are illustrated in the file [ImportingData.pdf](#). To import the data:

1. Place the cursor at the top left position where you desire to put the data.
2. Click the menu for **Tools, Data Tools, Quickcolumns**.
3. Use the file picker under “Text Source” to select the file.
4. Then click the [\[Settings\]](#) button. Uncheck the “Apply formatting to spreadsheet” and “Set spreadsheet column widths and row height” choices. Deselect the Comma box under “End of Cell.” Select the Custom box and enter } in it.
5. Click [\[OK\]](#) twice, and the data should appear as expected in the Zenas spreadsheet.

2. The Assumed Structure of the File System

The Zenas system assumes that the source files are kept on the hard drive of a desktop or laptop computer of the solo lawyer, and thus on the **C:** drive.² I store client files as follows:

C:\Cases - the folder in which subfolders for all active cases are kept. As of 2013, it also houses all of the Zenas files. It also houses the executable for the

¹ Note that a date exported with dashes rather than slashes will not import directly into Zenas without some extra work. “12-01-2011” would be imported as the formula 12 minus 1 minus 2011.

² Placing the files on a network, or making them otherwise available for multiple users, involves some additional considerations. QP allows the notebooks to be shared by selecting **Tools > Workgroups > Sharing** I have not experimented with this and therefore offer no advice. If responsibility for cases is divided, the client database (if not others) should be modified to indicate who is responsible, and the display pages need to be modified to reflect responsibility.

time logging program, as well as the Titlelog subfolder for its output.

C:\Cases\1234Smith - the subfolder in which files on case number 1234 are kept. After the number, I always enter one or more client names, which makes things easier to find. Zenas generates the following subfolders automatically, but you can modify the macro (**ZenasFileFolders.wcm**) to suit your preferences: **Dox** (documents); **Drafts** (where my WordPerfect legal pleadings are stored); **Letters** (letters, memos, bills); **Record** (where as-filed pleadings are stored); **Res** (Research).

C:\Cases\Zenas - the subfolder where the Zenas files will be located.

C:\Cases\Zenas\Macros - where perfectscript macros for the Zenas files will be located.

C:\Cases\Zenas\Forms - where forms and templates for the Zenas files will be located.

C:\Cases\Zenas\Temp - where temporary files that Zenas creates will be located.

C:\Cases\Titlelog - the subfolder where the Zenas files will be located.

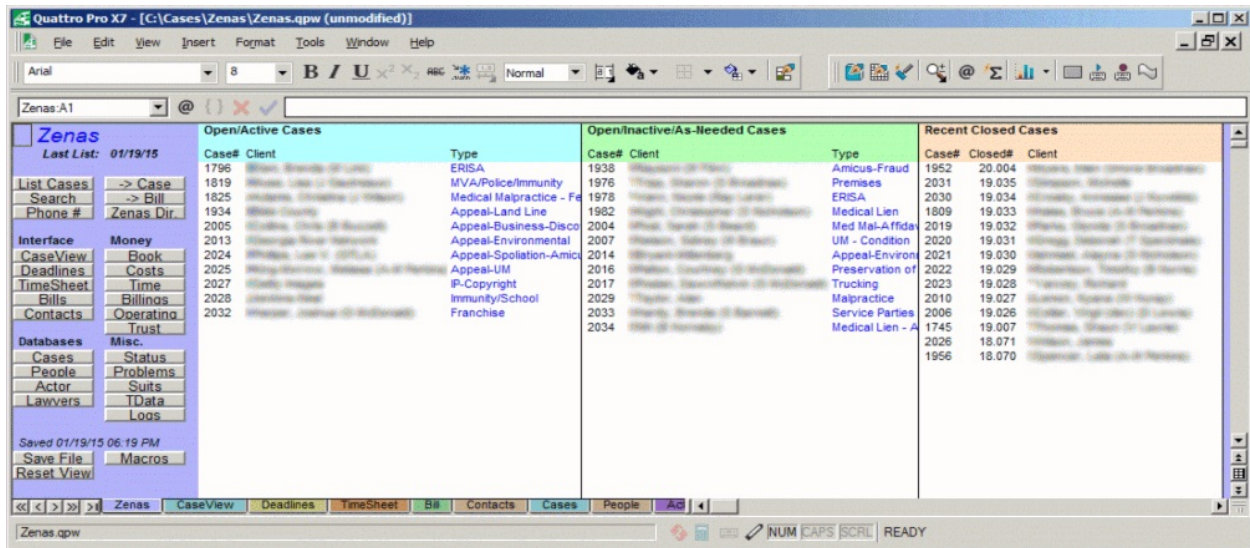
C:\Cases-X - Where closed files are kept. C:\Cases-X\10 houses all of the folders for client numbers 1000-1099; C:\Cases-X\11 does the same for client numbers 1100-1199, and so on. I move closed client folders to the C:\Cases-X\ subfolder simply to make the backup of active cases easier. If that is not a concern for you, you may leave everything under C:\Cases.

You may wish to store your files in some other way. For advice and instructions on changing the Zenas system to match some other method (presumably your preferred method) of storing files, see p. [79](#), below.

B. Orientation to Zenas and QP

1. The Zenas window

Zenas.qpw is a Quattro Pro **notebook**, which is a collection of separate **spreadsheets** or **sheets**. You can use it just as any other spreadsheet program. This document will assume that you have some familiarity with spreadsheets and entering data in them. Here is what the front sheet of Zenas looks like:



The top three lines are the typical title bar, menu bar, and a tool bar. (This particular tool bar is my own creation rather than one of the default QP toolbars.) The next line is an address bar and cell editor, the best place for editing large formulas.

There follows the large area for displaying data. You don't see the usual grid lines, column headers (A, B, C, etc.) at the top or row headers (1, 2, 3, etc.) along the left margin because those have been turned off for this sheet, and most of the sheets. This area includes horizontal and vertical scroll bars. The horizontal scroll bar is on the right half of the bar above the bottom bar. On the left half of that bar, there are tools for navigating the various sheets of Zenas (or any other QP notebook).



The names of each of the sheets are on the tabs there (**Zenas**, **CaseView**, **Deadlines**, etc.). The tabs are color-coded to match each sheet. Clicking on them causes that sheet to display. The direction buttons at the left of this line allow you to scroll through those sheets, which is useful in this case, because there are some 25 sheets, and they cannot all fit in the named display.

The bottom bar is an application bar. The left part of it shows the QP files that are open. The rest of the information on it is more or less useful for normal spreadsheet operations.

Color coding. Note the color coding of the backgrounds of these worksheets, the tabs for each of the pages (see the bottom left of these screen shots), and the columns of macros governing each of the worksheets. I have tried to link them to make the associations between them easier.

Grouping of sheets. Note that the sheets in this notebook are grouped together by function. The precise pages and groupings change over time, but the current breakdown is:

- Interface pages, those which the user will primarily read, print, and manipulate. These are **Zenas**, **CaseView** (for obtaining all information on a case), **Deadlines**, **TimeSheet** (for keeping each day's time), **Bill** (for getting current monetary status on each case), **Contacts**.
- Databases, the actual databases of information which is to be displayed by the interface pages, reports, etc. These pages are **Cases**, **People** (including corporations, etc.), **Actor** (which links People to Cases), **Lawyers** (short notes on contacts with lawyers or other people).
- Special-use pages. These are **CaseDiary** (compiles all databable entries on a case), **Status** (overview of next event on all open cases), **Suits** (listing all cases known to be in suit), **Problems** (listing four different kinds of problems with open cases), **TEntry** (for automatic rule-based ticklers/deadlines), **TData** (the database for automated tickler/deadlines), and **Logs** (for storing various information).
- Financial pages. These are **Book** (the "Book of Business," a financial report on all open cases), **Costs**, **Time**, **Billings**, **Operating** (the main bank account), and **Trust** (the lawyer's Trust or IOLTA account).
- Technical pages. Currently, the **Macs** page stores all of the macro scripts that run Zenas.

Dates. Zenas cells are spaced to display dates in the MM/DD/YY format, which is the second option under **Tools > Settings > Application > International > Date Format**.

2. Navigating in Zenas

As just mentioned, at the bottom left of each screen is a list of tabs. You can click on those to move from sheet to sheet. You can also move around from sheet to sheet with keystrokes as follows:

- **Ctrl+Home** takes the user to the first sheet (**Zenas**). For that reason, the

first sheet serves as a place from which to jump everywhere else. Buttons on the **Zenas** sheet (and on various other sheets) allow jumping to other sheets.

- **Ctrl+PageDown** takes the user to the next sheet.
- **Ctrl+PageUp** takes the user to the previous sheet.

Within a sheet, the user can get around by these keystrokes:

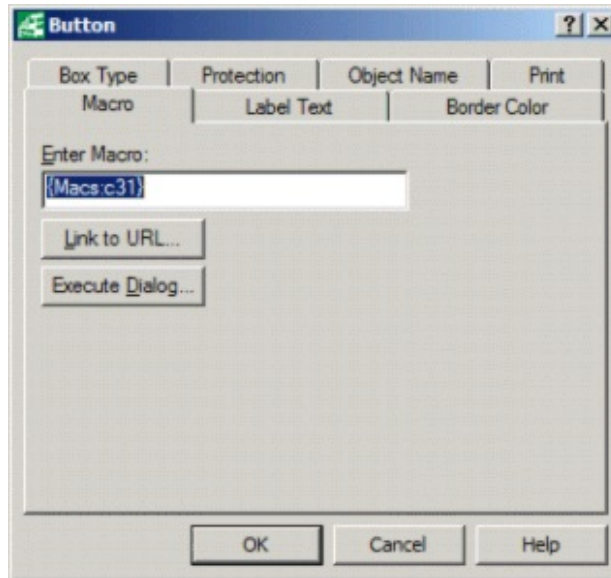
- **Home** take the user to the top left cell (Cell A1) in the sheet.
- **Home, End, Home** takes the user to the opposite end, the intersection of the column with the last data and the row with the last data.
- **End, ArrowKey** (Up, Down, Left, Right) takes the user to the end of the contiguous block of data if the starting point is a cell with data; or the first cell with data (or the boundary of the spreadsheet) if the starting point is a blank cell.

In addition to these keystrokes, which apply to all QP spreadsheets, several navigation macros have been programmed. They are listed on the first sheet (**Zenas**) in columns P to R. Currently, they consist of the following:

With the cursor on	Press	To do this:
A Case Number	Ctrl+Shift+j	Go to CaseView screen for that case
A Case Number	Ctrl+Shift+b	Go to the Bill screen for that case
A Case Number	Ctrl+Shift+d	Create a deadline for that case
A Case Number	Ctrl+Shift+q	Show data on the case in a popup box
A Case Number	Ctrl+Shift+w	Enter a time record on that case
A Person Number	Ctrl+Shift+p	Show data on that person/entity in a popup box
(Any)	Ctrl+Shift+c	Get contact information on a person/entity

3. Buttons in Zenas

All of the buttons in Zenas run **macros** (scripts of commands), which are written on the **Macs** sheet. To find the macro associated with a button, right-click on the button, select **Properties**, and select the **Macro** tab. The dialog will look like this example, which shows that the macro script associated with this button begins on the Macs sheet at cell C31. (Macros are always enclosed in **{ }** braces.)



The user can add buttons by using the **Insert > Form Controls > Push Button** menu and dragging a rectangle. A button results. The user right-clicks it and selects **Properties**. On the **Macros** tab, the user places the beginning cell of the macro script within braces. On the **Label Text** tab, the user types the words that should be shown on the face of the button. Then click **OK**.

4. Manually adding to, and deleting from, Databases – A Warning.

The user must be careful about manually adding or deleting *rows* of data from any of the Zenas database. Important parts of the spreadsheet may lie to the right of the database; deleting the entire row would delete that, and inserting a row would create a gap that could affect the performance of Zenas. In addition, inserting and deleting rows causes QP to recalculate the size of certain named ranges, and consistency in their size is important. Therefore, take heed of these rules:

1. Where Zenas has a means for automatically adding data to, or deleting data from, a database, the automated means should be used.
2. The best method for inserting a line of data in a database is often to add it to the bottom of the database and then to use Zenas to sort the database.
3. The best method for deleting a line in a database is to select each cell in the row to be deleted, press **[Delete]**, and then use Zenas to sort the database.
4. Whatever you do, don't insert an entire row, and don't delete an entire row.

C. Annual Maintenance

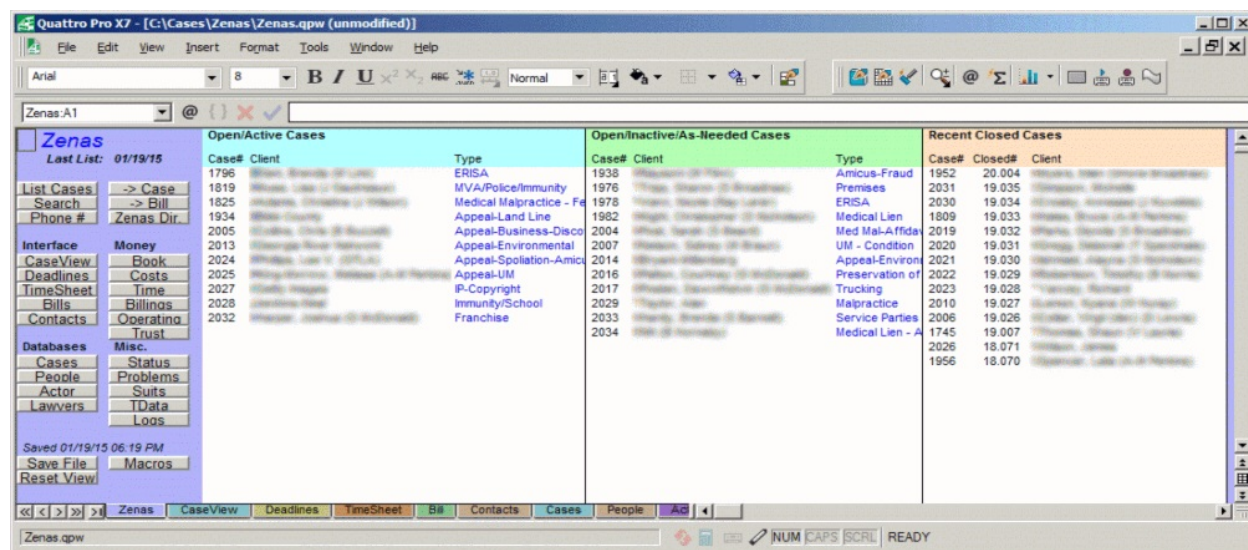
At the start of each year, I do two things. First, I save the spreadsheet in its year-end state with a name like Zenas2012.qpw.

Second, back in Zenas.qpw, I purge data from the databases that relates to closed cases. To do so, I place the cursor at the top of a column of case numbers and invoke the macro at **Macs:Z18**. This goes down the list and places an x at the beginning of each case number that is no longer open. I then sort the records by case number and quickly delete all entries for closed cases. I then re-sort by case number, which eliminates the gaps between records.

III. The Zenas Notebook

A. Zenas - Title Sheet, Case List, and Jumping Station

This shows **Zenas**, the first and title sheet of the notebook, which can always be accessed from anywhere in the spreadsheet by **[Ctrl+Home]**. Its purpose is to allow the user to move quickly to any page and to get information on any client quickly.



The buttons on the left take the user to the pages indicated. The rest of the screen contains lists of active, semi-active, and recently closed cases. The user can get various information on a client by clicking on a case number and pressing a button. The **[> Client]** button brings up case information on that client. the **[> Bill]** button brings up financial information on the case.

How to get a current list of cases.

Press the **[List Cases]** button. This will generate a current listing of cases in the database in three separate categories, which the user may well wish to modify. (To modify it, see p. 83.) The first listing represents active cases, and the second listing represents semi-active cases.

The distinction between **active** and **semi-active** cases turns on whether there is a special entry in the Status column (Column J) of the **Cases** sheet. If that column is empty, Zenas assumes that the case is active. To put a case into the semi-active category, I place an explanation into the Status column. Such explanations include “Awaiting ruling” (when briefing has been done and nothing remains but for a court to make a dispositive ruling, which is not expected soon), “Consult” (in which I am assisting another lawyer on an “as needed” basis), “Ref’d” (when I refer a case to another lawyer but keep it open to monitor), etc.

The third column shows recently closed cases. The program lists any case closed in the past 180 days. This can be increased or decreased, as shown at p. [83](#).

These work for me to reflect all of the cases I am likely to be concerned with on the first screen of information, so that I don't have to scroll. This may not be the case for a different lawyer, and it may therefore be more useful to modify the program to show, say, cases opened more than 180 days ago in the first column, and cases opened less than 180 days ago in the second. This can be done, as shown at p. [83](#).

How to search for a particular case in the entire database.

Press the [\[Search\]](#) button, which uses one technique for finding matches in the database; a different method is used on the next sheet.

The steps are illustrated in the help file [SearchForCase_Method1.pdf](#).

(Another way to search for cases, using a PerfectScript macro, will be discussed in connection with [\[Search for Client\]](#) button on the [CaseView](#) page.)

How to view information about a particular case.

There are two methods.

- Place the cursor on the desired case number here and click the [\[-> Client\]](#) button.
- Place the cursor on the desired case number anywhere in the notebook and press [\[Ctrl+Shift+J\]](#) (for “jump”).

Both methods invoke a macro that takes you to the [CaseView](#) sheet on the chosen case.

How to view financial information about a particular case.

There are again two methods.

- Place the cursor on the desired case number here and click the [\[-> Bill\]](#) button.
- Place the cursor on the desired case number anywhere in the notebook and press [\[Ctrl+Shift+B\]](#) (for “bill”).

Both methods invoke a macro that takes you to the [Bill](#) sheet on the chosen case.

How to see who has a phone number.

If you want to check to see if a phone number (or part of one) belongs to a person in the [People](#) database:

1. Click the [\[Phone #\]](#) button.
2. You will get a box in which to enter all or part of a phone number. When done, press [\[OK\]](#).

3. The spreadsheet searches for matches in three columns (**Phone1**, **Phone2**, and **Phone3**) of the **People** database. (To make these searches most useful, phone number should be entered with the same format; I suggest using periods in place of dashes and parentheses.) If there is no match, you will get a message saying so. If there is a match, you will be taken to an area on the **People** sheet where matches are listed.

Additional Benefit: This button runs the ZenasPhoneNo macro. By placing an icon to that macro on the desktop and adding a shortcut key to it (right-clicking the macro, selecting Properties and Shortcut), as long as Zenas is open, I can determine if a particular incoming call is in the Zenas database.

How to go to the folder where Zenas stores files.

Click the [\[Zenas Dir\]](#). button.

How to go to other pages of the Zenas notebook.

The other buttons take the user to the other sheets of the notebook. They are grouped into:

- Interface sheets (**CaseView**, **Deadlines**, **TimeSheet**, **Bill**, **Contacts**), which are the ones that the user will mostly use to get information out of Zenas and regularly add to it. These sheets are placed in the first part of the notebook, and their tabs should also be visible in the bottom left of the Zenas window.
- Database sheets (**Cases**, **People**, **Actors**, **Contacts**), where most of the data are stored (though deadlines and financial data are stored on those pages).
- Money sheets (**Costs/Expenses**, Attorney **Time**, **Billings**, the **Operating Account**, and the **Trust Account**).
- Misc. other sheets.

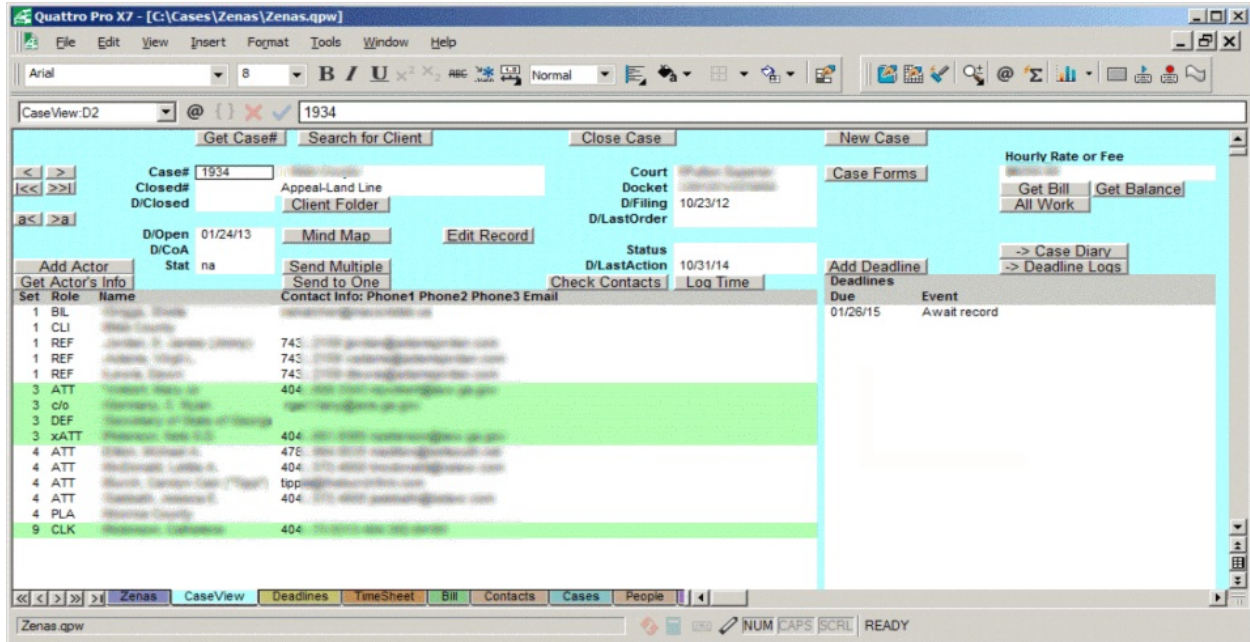
These will be explained in more detail below.

How to save the Zenas notebook.

The File > Save menu item and the associated icon on the toolbar work. QP works with temporary files, and sometimes (rarely) the title bar will reflect something like QP0000.qpw rather than Zenas.QPW. There may be no harm in ignoring the temporary file, but just in case, I use a button at the bottom left called [\[Save File\]](#). The macro is set to save it in the default location, C:\Cases\Zenas\Zenas.qpw. That can be changed by changing the contents of **Macs:C123**.

B. CaseView - The Main Page for Individual Cases

This picture shows CaseView, the main worksheet for viewing and modifying information about a case. It is also the place where new cases are opened and existing cases are closed.



Zenas pulls this information directly from the databases.

- The case information across the top comes directly from the **Cases** database, specifically on the row that begins with the **Case#** (here 1934).
- The deadlines in the bottom right come directly from the **Deadlines** database; every entry on the present case in the Deadlines database should be displayed here.
- The information on people connected with the case appears in the bottom left comes from the **People** database via the **Actor** database.

The **Actor** database (shown to the right, using case 1822 as an example) is the glue that binds people to cases. Zenas looks for each entry on the case in the **Actor** database, and looks up telephone and email information on the person in the **People** database by using the **PNo**. The last two columns (**Set** and **Role**) define *how* that person is related to the case. Persons directly connected with the client (here, CLI and REF, for the client and the referring lawyer) are given set 1. The first

	A	B	C	D
1	Sort Actors			
	Case#	PNo	Set	Role
1244	1822	1723	1	CLI
1245	1822	1718	1	REF
1246	1822	1719	1	REF
1247	1822	1598	2	REF
1248	1822	2123	2	REF
1249	1822	2103	4	ATT
1250	1822	2104	4	ATT
1251	1822	2105	4	ATT
1252	1822	2106	4	ATT
1253	1822	2107	4	ATT
1254	1822	2101	4	DEF

set of opponents (usually DEF or PLA) get set 4, the second get 5, and so forth. Witnesses, judges, and others will *typically* get higher set numbers. This list remains sorted. All people connected with a set are kept together, and thus the screen will show that the ATT for set 4 is the attorney for the first opponent, etc. Names and phone numbers are thus sorted with the most important numbers at the top of the list.

1. Navigating

At the top left there are navigation buttons. As one might expect, [[<](#)] moves to the preceding case (the one with the next lower number), and [[>](#)] moves to the next case. [[||<<](#)] moves to the first case in the database, and [[>>||](#)] moves to the last case.

Below those are two buttons that navigate *active* cases, [[a<](#)] which goes to the preceding active case, and [[>a](#)] which goes to the next active case.

To move directly to a case known by its Case#, click the [[Get Case#](#)] button. Enter the Case# into the dialog box that opens up.

To move to a case known by a name, click the [[Search for Client](#)] button.

The steps are illustrated in the help file [SearchForCase Method2.pdf](#).

2. How to open new cases

In overview, you will enter data on the new case on the next blank line in the **Cases** database, and Zenas will display it. Zenas will also create the folder for this case on your hard drive, some subfolders for it, and some default files for it.

The steps are illustrated in the help file [OpeningNewFile.pdf](#).

You may then create whatever normal forms that you want to create; I automate that process with additional buttons on the **CaseView** screen. Add people and deadlines using buttons on the same screen.

For example, if you were to create a case on John Smith, follow these steps.

1. Press the [[New Case](#)] button.
2. You will be taken to the first blank row in the **Cases** database, and some data will already be filled in. You will get a reminder not to use the **Enter** key until you have filled in all of the data that you know at the time. After you click [[OK](#)] on this reminder, the row will look like this (broken into two parts for purposes of display here):

	A	B	C	D	E	F
1	Case#	Closed#	D/Closed	Client	Type	D/Open
654	2030	19.034	12/26/14		Appeal-Premises	12/16/14
655	2031	19.035	01/06/15		Appeal-Default	12/31/14
656	2032	0.000			Franchise	01/08/15
657	2033	0.000			Service Parties	01/13/15
658	2034	0.000			Medical Lien - Att	01/14/15
659	2035	0.000				01/18/15
660						

G	H	I	J	K	L	M	N	O
D/CoA	Stat	D/LastAxn	Status	Ct	DocketNo	D/Filing	D/LastOrder	Fee
		12/26/14	Closed					?
		01/06/15	Closed					?
		01/12/15						
		01/19/15	Standby					
		01/14/15	Standby					

The program assigns the next Case# in column A and the Closed# of 0 (formatted here to three decimal points for reasons explained above in connection with storage of closed cases) in column B. Zenas considers a file **closed** if there is a positive number in column B, but **open** if the number is zero. It places today's date in columns F and I, which deal with the date the file is opened and the date of last action on the case, respectively. It places the cursor in column D for naming the client.

3. Fill in the remaining data, to the extent that it is known, and press **[Enter]**.

In the **Client** field, I typically put the client's last name first, then first name, then a referring lawyer or other connected person in parentheses.

In the **Type** field, I would place something like "Appeal" or "Med Mal Consult" or "ERISA," etc. Use whatever names are meaningful to you.

The **D/CoA** field is for the date the cause of action arose (when the wreck occurred, or when the contract was broken, etc.). It is the starting date for filing suit within a period of time. QP allows you to enter dates in our familiar m/d/y format, and it will (a) convert that entry into the five-digit number that QP associates with that date, and (b) display it in the format shown above, if the cell is formatted to show the number as a date (which can be done by pressing **[F12]**, selecting the **Numeric Format** tab, choosing **Date** in the left column, and **Long Dat Intl** in the right column).

The **Stat** field is for the Statute of Limitations, which are almost always expressed in periods of years. Therefore, enter the number of years for the period of limitation. In Georgia personal injury actions, for example, the period is

generally 2. Zenas will use this number and the **D/CoA** number to calculate deadlines.

The **Status** column defines whether the case is **Active** or **Semi-Active**. If this field is blank, Zenas treats the case as Active; if the file is open, it will appear in the leftmost column of cases on the **Zenas** sheet. I enter a textual explanation in this field to demote the case to semi-active status (appearing in the second column of cases on the **Zenas** sheet). I use “Consult” or “As Needed” when I am helping another lawyer. I use “Awaiting decision” when the case has been submitted to the court for what is likely to be an extended period of time, with nothing happening in the meanwhile. If I refer a case out that I continue to monitor, I might type “Ref’d to John Smith.”

If the case is already in suit, I fill in the **Ct**, **DocketNo** and **D/Filing** fields.

In the **Fee** field, I use either a number reflecting an hourly rate, or an abbreviation. “C1/3+c” would reflect a contingent fee of 1/3 plus costs. If an hourly rate applies, Zenas takes this number to generate bills. If I don’t yet know what the fee arrangement will be, I type a question mark.

4. After entering all of that data and pressing **[Enter]**, the user gets a dialog box in which to enter the name of the subfolder to be created in the c:\Cases\ folder. It suggests a name, beginning with the file number. If the folder begins with the case number, Zenas will automate various things. After typing the desired folder name, the user presses **[OK]** or **[Enter]**.

5. The user is returned to the **CaseView** screen for the newly created case. A reminder message appears, advising the user to add parties, to add deadlines, to create file labels, and to create an email folder in my email program for emails on this case. (On deactivating or changing informational messages, see p. 82.) **[File Label]** and **[Case Forms]** buttons on the right of the screen generate the paperwork I want.

3. How to close cases

Follow these steps to close a case. The steps are also illustrated in the help file [ClosingFile.pdf](#).

1. Start by showing the case to be closed on the **CaseView** sheet.
2. Click the **[Close Case]** button. This takes you to a place on the **Logs** sheet showing closed file boxes (column Y), and the last numbered file in each one.
3. With that information, you enter **Closed#** to be used for that file. Click **[OK]**. (On deactivating or changing informational messages, see p. 82.) Type in a number and press **[Enter]**.

In my system, this number is a composite of a box number (in which the

paperwork is placed), and an item number. For example, the number 18.002 means that this file can be found in box 18, and it is the second item in that box.

4. Zenas makes adjustments to the **Cases** database, and returns to the **CaseView**, showing now the **Closed#**, the date of closing (today), and above the case number, the word “CLOSED” appears. The user gets a reminder message to move the case folder to an archive folder (in my system; you may leave it where it is if you please) and to move the physical file to storage. Click **[OK]**.

5. Finally, if there are deadlines on the case in the **Deadlines** database, Zenas marks them “Done” as of this date. That is described in connection with the **Deadlines** sheet, which is discussed beginning at p. [32](#).

In most cases involving physical files, I hand-write the Closed Case # onto the folder before putting it into the storage box. In some case that involve little or no paper, however, I don’t waste a folder on the case. Instead, at this point, I use the **[Case Forms]** button to generate a single sheet of paper in WordPerfect with pertinent case information, including the Closed Case #, and I put that into the storage box.

4. How to reopen cases

1. Start by showing the case to be reopened on the **CaseView** sheet.
2. Click the **[Reopen Case]** button. That button appears in place of the **[Close Case]** button if the case displayed has already been closed.

5. How to add people to the case

In overview, you will type all or part of the last name to see if the person is already in the database. If so, selecting the person works. If not, you will be given the option to add the person to the database, and if you choose to do so, you will be taken to a blank line in the **People** database to type data on that person. If you select or add a person, you will finally be asked to define how that person relates to this case in the **Actor** database. After this, you will be returned to the **CaseView** sheet, which will show the addition you have made.

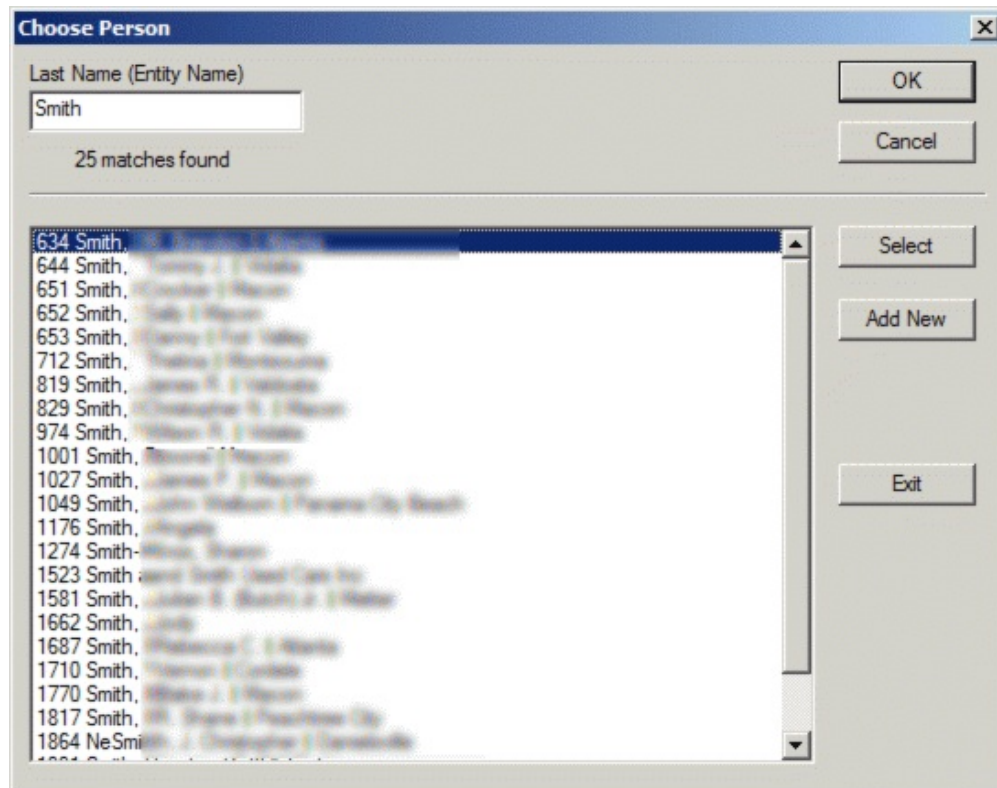
The steps are also illustrated in the help file [AddingActors.pdf](#).

Phase 1: Listing possibilities in the People database.

Just as there are two methods for finding a case, there are two methods for finding a person. Zenas currently uses the PerfectScript macro method starting at Macs:F44, which calls **ZenasPickPerson.wcm**. The earlier QP-based method starts at Macs:F4. If you prefer that one, you may change where the **[AddPerson]** button points.

Here is a detailed example, assuming that you want to add John Smith to this case:

First, click the [\[Add Person\]](#) button, and the **Choose Person** dialog box will open. Type in the last name, “Smith” in this instance, and click [\[OK\]](#). (In the case of a corporation, any part of the name will do.) Zenas will list every person (including “artificial” persons like corporations) in the **People** database. Here is what the result might look like.



Phase 2: Selecting or adding the correct person.

If the correct person is listed as already in the database, you will select that person (Phase 2A). If not, you will need to add that person to the **People** database (Phase 2B).

Phase 2A - Selecting a person already in the People database.

If the person is already in the database, select that person and click the [\[Select\]](#) button. You will move on to Phase 3.

Phase 2B - Adding a new person to the People database.

If the correct person is not listed, click the [\[Add New\]](#) button. You will be taken to the first blank row of the **People** database, with a new **PNo** inserted and the name (in this example, “Smith”) inserted. Fill out the rest of the information on that row. It will look like this (with the single horizontal line broken into two segments for readability):

	A	B	C	D	E	F	G	H
1	PNo	LName	FName	Hon	Sr	A1	A2	A3
2243	2242							
2244	2243							
2245	2244							
2246	2245							
2247	2246							
2248	2247	Smith						

I	J	K	L	M	N	O
City	St	Zip	Phone1	Phone2	Phone3	Email
Atlanta	GA	30303	404.555.1234			
Atlanta	GA	30303	404.555.1234			
Carrollton	GA	30017	770.274.0000			

LName is the last name. **Hon** is the title of address (Mr., Ms., Hon. Dr., etc.). **Sr** includes (Sr., Jr., III, IV, etc.) Three lines for a mailing address are **A1**, **A2**, and **A3**; fill them in that order. **City**, **State** and **Zip** are self-explanatory, as should be **Email**. (Be watchful, though, that the zip code is treated like text and not like a mathematical formula.)

When adding a corporation or other entity to this list, enter the full name in the **LName** field only.

Three possible **phone numbers** are allowed. These formerly represented the home phone, work phone, and “other” (fax) line, but with the prevalence of cell phones, these can be used in any order that works for you. To be more helpful, I now add a “c”, “h,” “w” or “f” after numbers to refer to cell, home, work, and fax lines. In order to facilitate searching phone numbers, I recommend that you use one consistent method of dividing numbers. I use only periods (e.g., 404.123.4567), not dashes (*not* 404-123-4567) and not parentheses (*not* (404)123-4567).

For entering corporations or other legal entities, use only the **LName** column, and ignore **FName**, **Hon** and **Sr**.

After you finish entering that data, press **[Enter]** to proceed to the Phase 3.

Phase 3 - Linking the person to the case in the Actor database.

At this stage, two small dialog boxes will appear. In the first, you will assign John Smith a **Set** number to position him in the final display. In the second, you will assign a **Role** designation. In this sample, I assigned him to Set #1 (usually the client or those closely linked with the client), and assigned him the role of “REF,” which signifies a person who refers the client to me.

As for the **Set** number, you can use any consistent system that makes sense for

you, but because I want the most important information at the top of the list, I assign first priority to clients and the other lawyers on my side of the case.

As for the **Role** designation, to conserve horizontal space, I try to use a three letter designation to tell me what I need. The following chart is my default system, but it is flexible to accommodate needed changes.

Set	(Significance)	Role
1	Client and lawyers on my side of the case	CLI (client); REF (referring attorney); ATT (attorney)
2	(Rare) other persons closely connected with my side of the case	
3	Co-Parties	3DP (third party); COP/COD (Co-plaintiff, co-defendant)
4	First set of opponents	DEF (defendant, if I'm on the plaintiff's side); PLA (plaintiff, if I'm on the defendant's side); ATT (attorney); INS (Insurer); ADJ (adjuster)
5	Second set of opponents, etc.	Same.
8	Witnesses	WIT (witness); EXP (expert)
9	Judicial personnel	CLK (Clerk); JDG (Judge)

After entering the Set and Role, press **[Enter]** to return to the CaseView page, where the person has been added.

6. Changing data on the Case or People

Using the Edit Record button, you can easily change data on the case or people connected with it. The steps are illustrated in the help file [ChangingData.pdf](#).

How to edit the case data shown on this sheet.

Click on any of the information fields on the top half of the **CaseView** field and then click the **[Edit Record]** button. This takes you to the line in the **Cases** database on the current case, and to the cell in it for the field that you chose. Make your changes to this data. Conclude by pressing **[Enter]** to return.

For example, if after filing suit you can fill in the information in the top right, click on the blank where Court information is shown and press **[Edit Record]**.

This will take the user to column K of the **Cases** database, which relates to the court in which the case is pending (pictured at left). Enter the court, the docket number, and the date the suit was filed in Columns K, L and M, and then press [\[Enter\]](#). The changes should appear back in the CaseView menu.

How to edit data on people shown on this case.

Find the person whose data is to be changed on the CaseView sheet and click the Name or the Contact Info on that row. Then click the [\[Edit Record\]](#) button. This takes you to the row in the **People** database on the chosen person. Make your changes to this data. Conclude by pressing [\[Enter\]](#) to return.

How to change the Set and Role of an Actor.

Find the person whose data is to be changed on the CaseView sheet and click the Set or Row cell on that row. Then click the [\[Edit Record\]](#) button. This takes you to the row in the **Actor** database on the chosen person. Make your changes to this data. Conclude by pressing [\[Enter\]](#) to return.

7. Generating Pleadings and Other Forms on this Case

The WordPerfect Office system allows the user to perform document assembly, taking information in the databases on the current case and generating documents in WordPerfect, mostly using WordPerfect's merge feature.

By pressing the [\[Case Forms\]](#) button, the user gets a selection of forms to generate. These include paperwork on the file that I find useful, as well as a caption for initiating legal pleadings. For information on how to modify this list in a way suitable for your use, see the discussion below at p. [77](#).

8. Other functions

How to show all information in the People database on each person listed on the sheet.

(1) Click anywhere on the line of information about the person whose data is to be shown. (2) Then click the [\[Get Actor's Info\]](#) button. This will pull up a window containing all of the information in the People database, headed by a mailing address suitable for letters.

Additional information about such persons is available on the **Contacts** sheet, which provides a complete list of all cases with which that person has been involved, and all other contacts that you record concerning that person. See the discussion below at p. [44](#). To get this information automatically, (1) click anywhere on the line of information about the person whose data is to be shown. (2) Then click the [\[Check Contacts\]](#) button. This would be a way to perform a

conflicts check (though most sole practitioners have a good recollection of their clients and adversaries).

How to send an email to a particular person listed on the sheet.

Click anywhere on the line of information about a person whose email address is shown. Then click the [\[Send to One\]](#) button. This will pull up your default email program, with the email address in the “To” line and the case name in the “Subject” line (which you should consider editing).

How to send an email to more than one person listed on the sheet.

Click the [\[Send Multiple\]](#) button. This takes you to the Actor page. Follow the directions on p. [50](#). These steps are illustrated in the help file [EmailingMultipleActors.pdf](#).

How to print envelopes for multiple people listed on the sheet.

Click the [\[Send Multiple\]](#) button. This takes you to the Actor page. Again, follow the directions on p. [50](#).

How to log time on this case.

Simply press the [\[Log Time\]](#) button. This will take you to the **TimeSheet** worksheet, and start an entry for this date, at this time, with this client number. The **TimeSheet** is discussed below at p. [37](#).

How to add a deadline or reminder on this case.

Simply press the [\[Add Deadline\]](#) button. This will take you to the first blank line of the **Deadlines** worksheet, and start an entry for this date, at this time, with this client number. The **TimeSheet** is discussed below at p. [37](#).

How to prepare a bill on this case.

Clicking the [\[Get Bill\]](#) button will take the user to the **Bill** sheet and runs a current balance statement. That sheet can be used to generate a bill for the client. It is discussed below at p. [40](#).

How to get the current fee balance on this case.

Clicking the [\[Get Balance\]](#) button will popup a message including the fees earned on the case, as shown on Zenas’s **Book** page (the “Book of Business”), which is discussed below at p. [67](#).

How to generate a history of all time spent on this case.

This is a variation on preparing a bill. Clicking the [\[All Work\]](#) button takes the user to the **Bill** sheet and generates a statement of prior time in the case. The **Bill** sheet is discussed below at p. [40](#).

How to generate a diary on this case.

Click the [\[→ Case Diary\]](#) button, and Zenas will take you to the **CaseDiary**

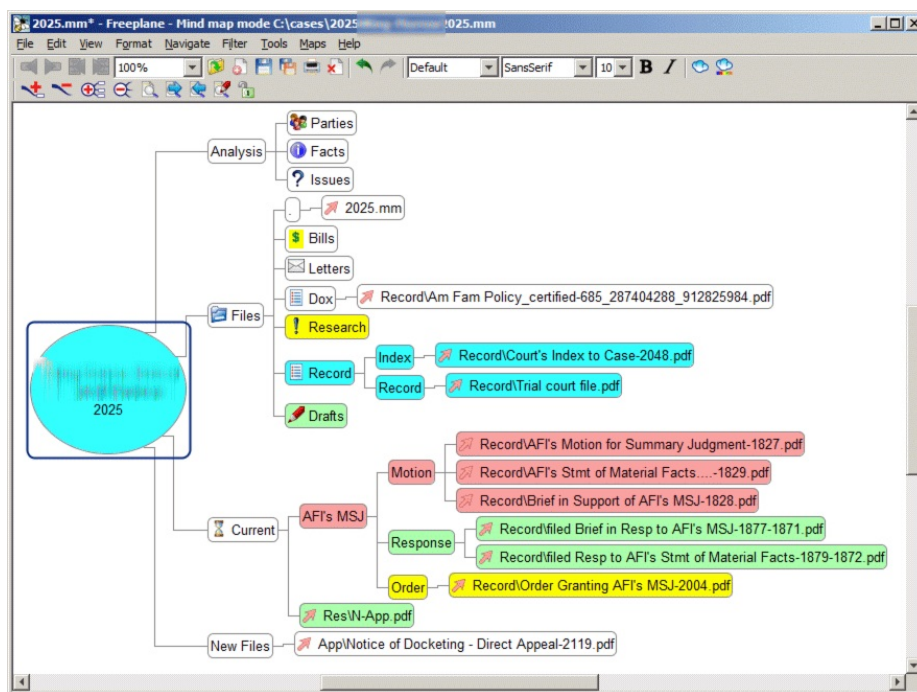
sheet, where it combines chronological information from the **Cases**, **Time**, **Billings**, and **Deadlines** archive databases in chronological order.

How to open the folder of files on this case.

Simply press the **[Client Folder]** button. This assumes that you store your files as indicated in Part [II.A.1](#) on p. [10](#), above. If you use a different file location, please read the instructions on modifying file locations at p. [79](#), below.

How to open a mind map on this case.

Simply press the **[Mind Map]** button. This assumes that you store your files as indicated in Part [II.A.1](#) on p. [10](#), above. If you use a different file location, please read the instructions on modifying file locations at p. [79](#), below. Clicking the macro gives the user first the option of adding all new files in the client's folder to the mindmap. In this way, the mindmap serves as a file manager.



This is a view of a typical mindmap. Here are some features:

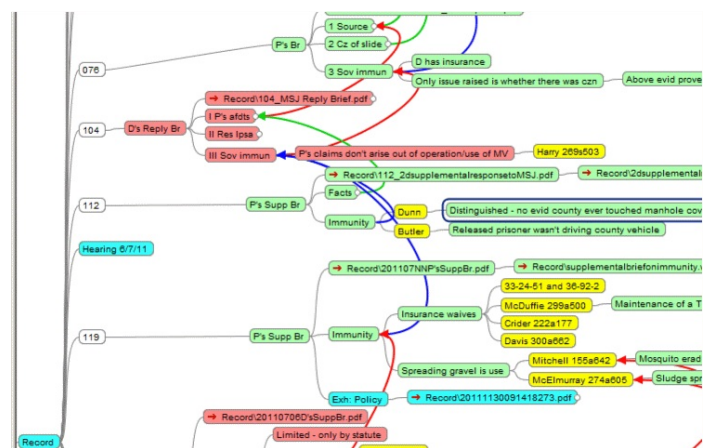
- New files are added to a node at the bottom called “New Files.” They can be drug from there to any other node.
- Clicking on the red arrow on any of those nodes brings up the document referred to there.
- The combination of the last two features allows this to serve as a file manager.
- Once open, clicking on a node “unfolds” (opens) it if it is “folded,” or “folds” (closes) it if is “unfolded.” So, clicking on the “Record” node in this example will either open up or close an array of nodes on various parts of the record in the case,

some of which are folded and some not.

- Parallel nodes can be added, and subnodes can be added.
- The nodes are color coded, with our side's documents in green, the opposing side's in red, and the court's in yellow, and neutral persons in blue, as seen here.



- More detailed nodes can be added.
- Arrows can be added to connect nodes at remote distances, as seen here:



For a brief overview of other uses of mind maps in a legal practice, see my [short introduction to the use of a mind map in a law practice](#).

C. Deadlines - The Main Sheet and Database for Deadlines

This shows the main sheet for viewing and entering information on deadlines. It is not just the interface to the database; it is the database for deadlines. Unlike the other interface pages (**CaseView**, **Contacts**, **Bill**), this database needs the most regular viewing and hands-on modifications, which functions are combined here.

Case#	Client	Due	Done	Event	Trigger	Days	+/-	
1886		06/08/12			05/29/12	10	-3	xxx
1745		06/11/12			03/03/12	100	0	Today
1840		06/12/12			05/18/12	30	-5	1
1793		06/14/12			06/20/11	360	3	
1796		06/15/12			06/15/12		4	
1825		06/15/12			04/06/12	70	4	
1829		06/18/12			12/12/11	189	7	
1837		06/18/12			01/17/12	153	7	
1799		06/20/12			06/21/12		-1	9
505		06/28/12			07/26/12	-21	-7	17
515		06/30/12			06/30/12			19
1666		06/30/12			06/30/12			19
1717		06/30/12			06/30/12			19
1809		06/30/12			06/30/12			19
1819		06/30/12			06/30/12			19
1822		06/30/12			06/30/12			19
1833		06/30/12			06/30/12			19
1834		06/30/12			06/30/12			19
1853		06/30/12			06/30/12			19
1857		06/30/12			06/30/12			19

What this shows.

The **Case#**, **Client**, and **Event** fields should be self-explanatory.

The **Due** field is the deadline for the deadline. It is a mathematical formula that adds the date in the **Trigger**, **Days**, and **Vary** fields. The formula should not be altered.

The **Done** field is for manually inserting the date on which a deadline was performed. It is entered prior to using the macro to place this deadline in an archive log of deadlines done.

The **Trigger** field is the base for time calculations. It is either the event that starts a deadline running, or it is the deadline itself. If it starts the deadline running, the number of days allowed should be put into the **Days** column. The **Vary** column can then change the result of that calculation. Here are some examples:

- If you have a hearing on 9/1/12, place 9/1/12 into the **Trigger** column. If you want this deadline to come up three days in advance of that hearing in order

to remind you to prepare, place -3 in the **Vary** column.

- If you have 30 days to respond to a motion served on 9/1/12, place 9/1/12 into the **Trigger** column and 30 into the **Days** column. If you want this reminder to come up a week earlier (to start working on it), place a -7 into the **Vary** column.
- If you later get a two-week extension to respond to the last motion, you could either add 14 to the **Days** column or simply replace the **Trigger** and **Days** entries with the new deadline in the **Trigger** column alone.

The two right-most columns in red on the gray background calculate the days until (since) the deadline, on the left, and give a more graphic representation of the same on the right. For every day past a deadline, the right formula prints one “x” for each day past the deadline.

At the top right of this view, there is a line that shows today’s date. I often use this in entering dates rather than checking the calendar by other means.

1. Adding Generic Deadlines

There are several ways to add deadlines to this listing.

- Manually. If you choose to do so, go to the first blank row, enter all the information (including copying the formula cell in the **Due** column), and then sort the database.
- Case#. Place the cursor on any case number anywhere in the notebook, and press **[Ctrl+Shift+D]**. This takes the user to the bottom of the deadline database, enters the case number, client name, and formula for the due date. It gives instructions for finishing the data entry. When finished, press **[Enter]**.
- On the CaseView Sheet. Press the **[Add Deadline]** button, which does the same as Case# method, except that it treats the current case number and client name on the **CaseView** sheet as the data to enter into the **Deadlines** database.
- Add New Deadline Button.
 1. Click the **[Add New Deadline]** button.
 2. You will be taken to the **Zenas** sheet to select a case. Place your cursor on the Case# and press **[Enter]**.
 3. You will be taken back to the Deadline sheet for manual entry of the Event and date data. When done, press **[Enter]**.

2. Adding Rule-Based Deadlines

This method sets deadlines for rule-based deadlines, such as deadlines for filing

suit, conducting discovery, responding to discovery, responding to motions, handling appeals, and anything else with a normal deadline. In overview, after selecting the case number, you will go to a screen on which to select a category and subcategory of deadlines, and type in the triggering date. Zenas will add appropriate deadlines to the Deadlines database. This uses deadlines that are pre-calculated on the **TData** sheet.

These steps are illustrated in the help file [AddingRuleBasedDeadlines.pdf](#).

1. Click the **[Rule-Based Deadlines]** button.
2. You will be taken to the **Zenas** sheet to select a case. Place your cursor on the Case# and press **[Enter]**.
3. You will be taken to column A of the **TEntry** sheet. Zenas reads from the **TData** sheet the major categories of deadlines in the A column, categories such as “Presuit,” “Suit filed,” “Discovery,” and so on. These will be listed in the W column. Select the appropriate category and press **[Enter]**.
4. You will then be taken to column B on the same sheet. Zenas will read and list the subcategories from Column B of the **TData** sheet. Select the appropriate category and press **[Enter]**.
5. You will then be taken to cell C4 on the same sheet to enter the triggering date.

For example, if you want to apply for certiorari from an unfavorable ruling by the Georgia Court of Appeals in a particular case, you would follow those steps, selecting “Georgia Appeals” under Categories in the A column, “Cert Petition” under Subcategories in the B column, and then enter the date of the adverse ruling in C4, as shown in the image on the right.

6. Zenas enters all relevant deadlines on this case. It does so by locating the correct row on the **TData** sheet and then calculating up to ten deadlines flowing from the trigger date. In the example just given, the correct row is row 38 for the “Cert Petition” deadlines. Zenas takes the text of the three deadlines from cells D38, F38 and H38, the accompanying deadline-offsets (10 and 20 days) from E38, G38, and I38, and calculates the deadlines for certain events to occur.

3. Customizing the rule-based deadlines

You are free to modify the standard deadlines on the **TData** or add to the listing. To do so:

1. Establish major categories of deadlines in Column A. This is done primarily for convenient viewing. Without major categories, the user might have to scroll down fifty entries before finding the correct one. Using major categories makes the user’s job easier.

2. Set subcategories in Column B. Each subcategory should convey to the user the set of deadlines that Zenas will generate. Each will be paired with one triggering event (in column C) and from one to ten separate deadlines (columns C to W).

3. State the triggering event in Column C. This text will be used to identify the date that the user should enter into the Y4 cell on the **Deadlines** page.

4. Starting with the first deadline in columns D and E, enter the text that will appear in the deadline (column D) and the offset date (column E). Repeat for the second deadline, with text in column F and offset date in column G. Continue laterally until all deadlines generated from the same triggering event are set out. As for calculating the offset date:

A. Many times, the exact offset is set by rule, such as 30 days for discovery responses. I enter 30 as the offset, and ignore weekends and the extra 3-days allowed for mailed pleadings, but you are free to change this.

B. Sometimes, the deadline is specified in terms of a number of months or years. In that case, use the **@amnths** function. For instance, if the trigger date is place in TData:F1, a deadline that is two years later can be determined by the function **@amnths(F1,24)**, which calculates the date 24 months (2 years) after the date in F1. To calculate the exact offset, the formula **@amnths(F1,24)-F1** gives the correct result.

C. More detailed calculations of deadlines can be attained by more complex date formulas. See the QP Functions guide for Date formulas, including some like **@Workday**, **@IsBDay** and **@NBday** formulas that can address deadlines that fall on non-business days. I find that I do not need that level of precision.

4. Other Functions

How to Sort the Deadlines.

Zenas offers two methods of automating the sorting of deadlines. Using the **[Sort-Date]** button, deadlines are sorted by date first and case number second. The picture above shows the result of such a sort. By clicking the **[Sort-Case]** button, the user may also sort the database by case number (so that all deadlines on each case are grouped together), and secondarily by date.

How to Remove Old Deadlines.

You can manually remove deadlines by deleting the line of data (from **Case#** on the left to **Vary** on the right) and sorting the deadlines. However, I prefer to keep a log of deadlines that are Done, both to show when I did work, and to keep track of how long it takes for various Courts to rule on appeals, motions, etc. To do this:

1. Place the date on which the Deadline was accomplished (or the court ruled, etc.) in the **Done** column;
2. Place the cursor on that date; and
3. Press the [\[Deadline Done\]](#) button.

This moves the Deadline to the **Logs** sheet. (You can visit the Logs sheet by clicking the [\[Old Deadlines\]](#) button.)

How to keep up with your deadlines.

Check them daily. Zenas has a macro that plays automatically when the file is opened. This is located at Macs:a133. It automatically takes the user to the **Deadlines** sheet as the first item.

You should also regularly (at least weekly) run the Caseload Progress Report to detect any cases for which there is no deadline.

You should also regularly (at least weekly) sort the Deadline database by Case# and go down the list, adding deadlines where they are required.

How to use the Caseload Status Report.

On a separate page called **Status**, there is a table which I call the “Caseload Status Report.” To go to it immediately, click the [\[Status Report →\]](#) button. To get a current report, click the [\[Update Report\]](#) button on the **Status** page.

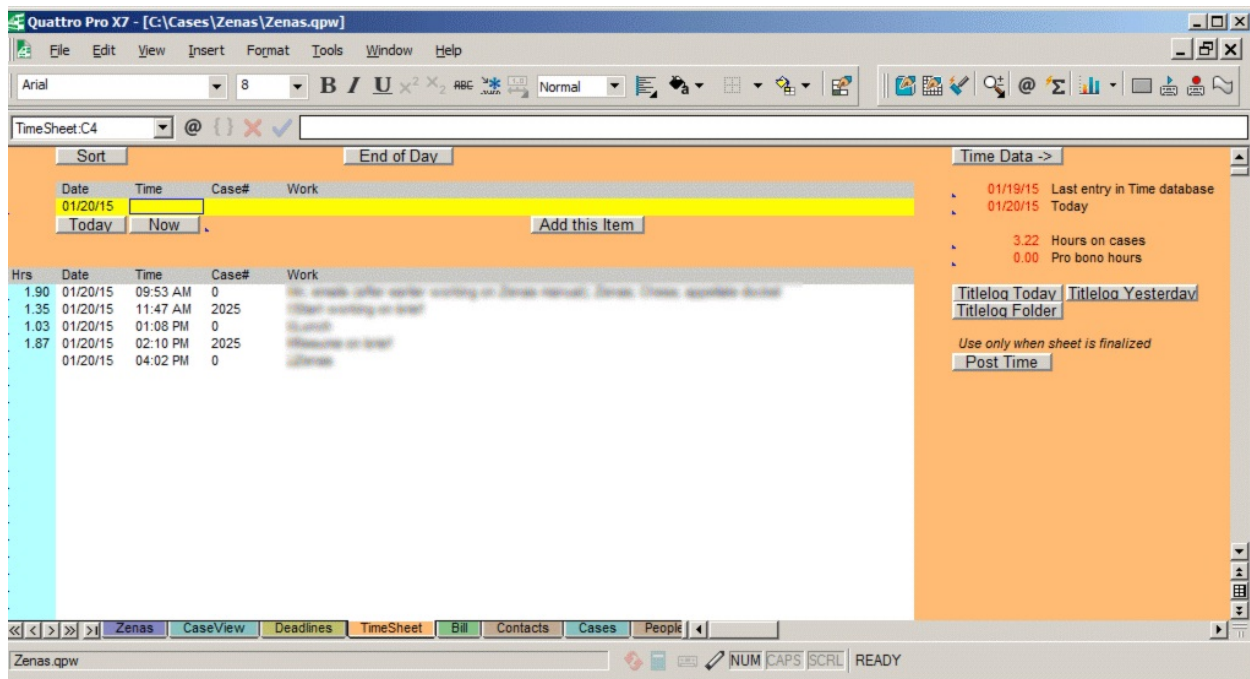
This report lists all open matters (including the pro bono matters that I give numbers below 1000), and it shows the next deadline, if there is one, or **ERR** if there is none.

If an entry shows **ERR**, this case is a potential problem. The computer does not reflect that the lawyer will refer to the case again. To avoid this, I try to have at least one deadline for each open case, even if it is a monthly or quarterly deadline (“Mcheck” or “Qcheck”, respectively) to “check status” on a case on which I am consulting. And since I check the Deadlines daily, this ensures that no case will slip into a crack.

I also print this report occasionally (every 1-2 weeks). The printed report gives an ongoing status of work and I use the paper copy to write out a prioritized list of major tasks, which I cross out when done.

D. TimeSheet - recording daily time

This shows the main area for entering daily time.



In short, the user enters data in the yellow area. Zenas then places the data into the sheet below in correct temporal sequence. The blue column on the left calculates the time on each item. Two numbers on the upper right side total the time spent on cases (entries in the **Case#** column greater than or equal to 1000) and on pro bono cases (entries in the **Case#** column greater than 0 and less than 10000). At the end of the day, the user presses the **[Post Time]** button, which posts time on all cases (entries with a **Case#** greater than zero) to the **Time** database. This macro also saves the data to a WordPerfect file that is called **C:\Cases\Diary.wpd**.

These steps are illustrated in the help file [UsingTheTimeSheet.pdf](#).

The number in the **Time** column may reflect 0-59 seconds, but the display of this number is rounded to the nearest whole minute.

This system does not support other timekeeping practices, such as billing in units of tenths (or quarters) of hours, which tend to record more time than the user actually spent.

When the user types a **Case#**, Zenas shows the name of case in the space below the **Case#** as a means to ensure that you attribute time to the right case.

How to enter time in the timesheet.

There are various methods of entering time records in this sheet.

Method 1. The user can manually type data into the white sheet, but that can

get data out of order. The [\[Sort\]](#) button at the top will restore the correct order. For routine entries, I recommend the following methods instead.

Method 2. The user can manually type data in the yellow area, and then press the [\[Add this Item\]](#) button, which will place the data from the yellow area in its correct position in the white data. This has the advantage in most cases of having the date already supplied.

Method 3. The user can press the [\[Now\]](#) button, which places today's date in the **Date** column, the current time in the **Time** column. Then, the user types the **Case#** and **Work** information, after which the user presses [\[Add this Item\]](#).

Method 4. From the **CaseView** screen, the user presses the [\[Log Time\]](#) button. This behaves as the [\[Now\]](#) button does, with the addition of the **Case#** from the **CaseView** sheet.

Method 5. Click on any cell containing a **Case#**, and then press [\[Control+Shift+W\]](#). This behaves as the [\[Now\]](#) button does, with the addition of contents of the starting cell as the **Case#**. **How to designate time as AM or PM.**

Time can be entered as AM time simply by typing the number. For example, the program treats an entry of 10:30 as 10:30 AM.

Time entered as PM time requires more. For example, to enter 3:30 in the afternoon, the user may type 3:30 PM, 3:30PM, or 15:30.

How to get the case number for entry in the timesheet.

That is what the **Zenas** page is for. Just click the **Zenas** tab at the bottom left, find the correct case number, and return to the **TimeSheet** page to enter this number.

How to calculate the last time entry in the day.

The formulas in the left, blue column calculate the time for an entry by comparing the time on the same row with the time on the next row. Since there is no entry below the last entry in the day, no duration is shown in the left column. If this were posted to the **Time** database now, no time would be recorded there for this work.

To deal with this, press the [\[End of Day\]](#) button. This will fill the yellow data entry cells with the current time, a 0 case number, and "End" in the **Work** field. If you need to adjust the **Time** entry, do so here. Then press [\[Add this Item\]](#). This will place the entry at the bottom of the time sheet. The time sheet will now be ready for finalizing and posting.

Getting the correct times before posting.

At the end of the day, I frequently remember things I did without inserting them into the timesheet. A **Work** entry that started as one thing may morph

many times, and my entry in the **Work** column will need to be expanded. Additional items come from, inter alia, scanning emails in my “Sent Mail” folder, other notes, and a Log file that Zenas keeps on the **Logs** sheet at columns M-Q.

I also use a time logger called Titlelog, which stores information about each window title that one accesses in a CSV file for each day. When I try to remember what I did in the day, I click the [\[Titlelog Data\]](#). Doing so opens the current day’s file of entries, highlighting places where I sent an email. I use this to make or correct time entries in the time sheet. When I have finished, I close the Titlelog file without saving it.

The [\[Titlelog Yesterday\]](#) button does the same thing for the previous day’s data.

The [\[Titlelog Folder\]](#) button takes the user to the folder where Titlelog stores its CSV files, so that you can get older data there.

How to adjust times and entries before posting.

If you must adjust the timesheet before posting, there are several ways to do so.

For simple alterations, manually editing the timesheet is the best and only way.

For inserting missing rows, I do not recommend manually inserting rows, for reasons explained at p. [14](#). Instead, use either of the manual methods for time entry that are described above, using the [\[Sort\]](#) button where necessary.

How to post time to Time database.

Only after the user has finished entering time and adjusting the timesheet to ensure accuracy, the user may post time to the permanent database. This is done by pressing the [\[Post Time\]](#) button. The user will get a warning to be sure that the entries are ready to post to final records.

Upon clicking **Yes**, the data on regular and pro bono cases (where the **Case#** is greater than 0) is saved to the Zenas sheet called **Time**. Then, the time sheet will be copied to a WordPerfect file called **c:\cases\Diary.wpd**. The macro then clears the timesheet for use the next day.

E. Bill - Accounting on Each Case

The Zenas notebook deals with the business end as well, and this **Bill** sheet is the primary interface for the economics of individual cases.

1. The Client Bill Interface Sheet

This sheet enables the user to calculate current balances (or obtain other financial information) on particular cases, from the **Time**, **Costs**, and **Billings** databases. The user may generate bills in WordPerfect from this page and update the databases to reflect when billings have been issued and when they have been paid.

The screenshot shows the Quattro Pro X6 application window with the 'Bill' sheet open. The interface includes a menu bar (File, Edit, View, Insert, Format, Tools, Window, Help) and a toolbar. The main area is divided into several sections:

- Top Left:** A 'Reports' section with a 'Unbilled' button and a 'CaseView' button. Below it is a 'Client Folder' section.
- Top Center:** A 'Report: Unbilled' summary box showing 'Hours: 0.88', 'Rate: \$250.00', 'Fees: \$220.00', 'Costs: \$21.64', and 'Total: \$241.64'.
- Top Right:** A 'Financial Report (Book)' section with buttons for 'Record Payment', 'Draft Bill', and 'Final Bill'. It also shows 'Balances' (Prior: \$77.50, Current: \$319.14) and 'Period starting' (02/13/13).
- Bottom:** Three data tables: 'Time Data', 'Costs Data', and 'History Billings Data'. The 'Time Data' table has columns for Date, Hrs, and Work. The 'Costs Data' table has columns for Date, Payee, Purpose, and Amount. The 'History Billings Data' table has columns for Date, Amount, Ev, and Balance.

The sheet places the data from relevant databases in the three blocks on the bottom of the screen. Those reports are generated by making selections of the client and starting date in the top left center, and then choosing a type of report from the two buttons on the top leftmost column. The sheet summarizes that data in blocks in the top center and top right of the screen. The sheet also contains seven navigation buttons and three buttons for billing and keeping accounts current.

How to generate financial reports on a case.

There are several ways in which to generate financial reports:

- **Case#.** Place the cursor on any case number anywhere in the notebook, and press **[Ctrl+Shift+B]**. This inserts the **Case#** into the yellow field in the **Bill** worksheet and runs the **Unbilled** report.
- **On the CaseView Sheet.** Press the **[Get Bill]** button, which does the same as

Case# method, except that it treats the current case number and client name on the **CaseView** sheet as the data to enter into the **Bill** worksheet and runs the **Unbilled** report. Alternatively, press the [\[All Work\]](#) button, which does the same, but runs the **All** report.

- **Manually.** Type the **Case#** into the yellow field marked **Case#** on the **Bill** worksheet and select one of the five Report options by clicking the corresponding button on the left. In the rare instances in which the user wants to start the billing from a particular date, that date should be entered in the yellow field marked **Start**.

What financial reports are available.

Two financial reports are available by pushing a button on the top left of the screen. For purposes of generating bills, the selection “**Unbilled**” is the most pertinent, and it is the default.

Unbilled. This generates a listing of all hours and costs suitable for generating a bill in WordPerfect. It lists hours and costs that have not been marked “billed” or “paid” in the bottom blocks and totals those items in the top center. It adds the total together. The result is ready to be converted into a bill by clicking either the [\[Draft Bill\]](#) or [\[Final Bill\]](#) buttons.

All. This itemizes all hours and costs relative to this Case, whether billed or not.

Understanding this system: “billed” and “unbilled” items.

The basis for this system of keeping the account with the client correct rests on correctly setting one of two “**status**” numbers to each entry in the **Time** and **Costs** databases. When these items are initially entered, their status is usually left blank, which is equivalent to **0** in Zenas. When they are billed, they are assigned the number **1**. In rendering the “Unbilled” report, Zenas will count only time and costs with a blank status, and only those will show up in the two blocks at the bottom left of the **Bill** page.

This system is set up so that time and cost items are given a status of **1** only when a Final Bill is prepared, using the [\[Final Bill\]](#) button. It is possible to change the status of each item manually, but that should not normally be necessary.

Understanding this system: Billings.

Zenas keeps records of account balances in the **Billings** database. Payments received are to be entered by clicking the [\[Record Payment\]](#) button, which will store a payment as a negative number in that database. Clicking the [\[Final Bill\]](#) button will, in addition to generating a Bill/Invoice/Statement of Account (synonymous terms as I understand them) in WordPerfect, will add a line to the **Billings** database calculating the new amount earned and current balance (which

will usually be the same, but for many reasons may not be).³

2. How to Record Payments

When a payment is received, or any other credit is to be given against the amount that the client owes, enter those payments by clicking the [\[Record Payment\]](#) button. You will then be asked the amount of the payment and the date of the payment. The amount of the payment will be stored as a negative number, and the date will be stored, along with a current balance, in the [Billings](#) database. After entering a payment, Zenas will update the display of the [Bill](#) page.

3. Handling the Billing

There are many possible ways to accomplish the task of sending Zenas/QP data to WordPerfect. I have settled on a method that uses a PerfectScript macro to open a WordPerfect template, take data from [Zenas.qpw](#) and directly insert it into the template.

The following steps are illustrated in the help file [HandlingBilling.pdf](#).

How to prepare Zenas to generate billing statements to send to clients.

Before using the Print Bill Macro the first time, you will want to replace or modify the bill template [Invoice.wpt](#). That document has my letterhead and taxpayer ID on it, which you *must* change for your own use. You can create a totally different format, but it is recommended that you keep a backup of the original files while engaging in trial and error with your forms.

How to generate billing statements.

You can use various methods to generate a billing statement, but this method does so very quickly. (This assumes that you have followed the steps to prepare Zenas to generate billing statements, as just explained.)

1. Generate an [unbilled](#) report on the case, as described above.
2. Make any modifications to the time and costs on the [Bill](#) worksheet. The reason for doing it now is that Zenas will calculate the amounts due and store them. Waiting to make adjustments in WordPerfect would require coming back to Quattro Pro to store the data manually. Making adjustments to the numbers in WordPerfect could easily cause totals to be wrong, and thus need adjustment in WordPerfect.

³ In earlier versions of Zenas, the user was required to approve these additions manually. Under this system, that is no longer required.

3. In addition, if there are credits to be given, as where the client has made an interim payment, or where some portion of trust funds are to be used, the user should treat them as payments (see “How to Record Payments” above) first, and then they will be properly accounted on the final invoice.

4. To see a test run of the bill, without committing it to a final version, click the [\[Draft Bill\]](#) button. This will generate an invoice/statement of account in WordPerfect. After reviewing it, close that file (since any later file will have to have the same name).

5. Continue making modifications on the Bill worksheet until the draft bill is as desired.

6. When you are ready to commit all of the numbers to final form, click the [\[Final Bill\]](#) button. This will (a) create an invoice in WordPerfect; (b) change the status on all time and cost items associated with this **Case#** to 1; (c) create a new entry in the **Billings** database with the current balance; and (d) update the display on the Bill page, so that all entries for time and costs disappear, replaced by a new entry of the amount billed.

4. Misc. Functions

How to navigate from the Bill worksheet.

The user can jump to the three databases by clicking the [\[-> Time Data\]](#), [\[-> Costs Data\]](#), or [\[-> Billings Data\]](#) buttons.

The user jumps to the “Book of Business” by clicking the [\[Financial Report \(Book\) ->\]](#) button.

The user can jump to the two overall accounts by clicking the [\[-> Operating\]](#) or [\[-> IOLTA\]](#) buttons.

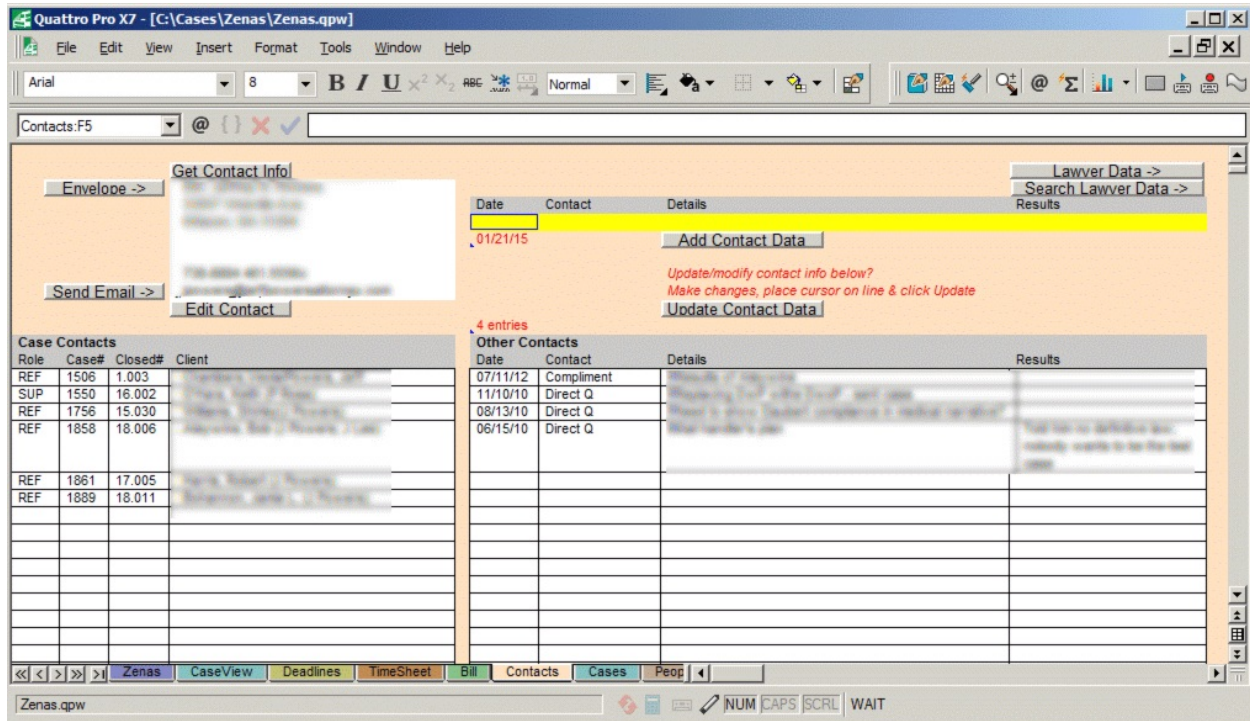
The user can jump to the **CaseView** screen for this case by pressing [\[<- CaseView\]](#). The user can also jump to the folder of electronic documents by pressing [\[Client Folder\]](#).

How to set the default hourly rate.

Zenas calculates the value of time, other than hourly-rate cases, using the “default hourly rate.” This number can be found in **Macs:B9**. To change the number used here, change the number in that cell.

F. Contacts - Conflicts and Other Relations

This is the main page for viewing information on people in your database. It is therefore useful for checking for conflicts (though most Solos have no real trouble with this) and interactions with others. I use it mostly for seeing what I have done with other lawyers. When you get old and deal with many people, this is good.



The basic idea is that you ask for information on a person in the database, and this screen gives you the main contact information.

What this shows.

The top left of the screen shows the contact information for the particular person, as stored in the **People** database.

The bottom left of the screen searches the **Actor** database to find every case in which the person has been involved, and pulls basic information about the case from the **Cases** database.

The bottom right of the screen looks through the **Lawyer** database⁴ and returns every entry that you have input, with the most recent entries on top. Each entry takes the form of a Contact Type, Details, and Follow-up (if any). You should

⁴ This could really relate to contacts with anyone in the People database, whether lawyers or non-lawyers, but because 99% of my entries in this category are with other lawyers, that is what I call it.

think of this as a set of interactions or communications, not a set of people, the common meaning of a “Contact.” This is a “contact” as *an event*, not a person.

The top right of the screen is the main way to input entries into the **Lawyer** database.

How to get contact information.

By pressing the **[Get Contact Info]** button, you get the same dialog box for selecting a person shown above at p. 25. Type in the last name and press **[OK]**. If the correct name does not appear, press **[Cancel]**, but if it does, select the name and press **[Select]**.

You can do the same on the **CaseView** page by selecting a person shown there and clicking the **[Check Contacts]** button.

Zenas then pulls contact information on the person from the **People** database into cells in the upper left, case information from the **Cases** database into the lower left, and contact information from the **Lawyer** database on the lower right.

How to edit the person’s personal information.

The **[Edit Contact]** button invokes a macro that takes you to the line of information about this person in the **People** database. When you make any appropriate changes and press **[Enter]**, you are returned to the **Contacts** screen.

How to add a communication/interaction with the person.

You may want to add contacts with someone who is in your **People** database. You don’t need to add such interactions if the person is added to a case, but if you have contacts with the person in some other way, you may want to make a record of it. I do so for email inquiries, interactions on listserves, telephone calls, etc.

Method 1: To enter new listings in the **Lawyer** database, place your cursor in the yellow cells in the top right. Enter the date, type of contact,⁵ details, and results if any in the yellow block of cells, and then press the **[Add Contact Data]** button. Zenas enters the line in the Lawyer database and updates the display in the bottom right of this screen.

Method 2: Manually enter data into the **Lawyer** database. Since that requires knowing the **Pno** for this person, it is a rare case in which this method would be desirable.

How to update or modify a communication/interaction with the person.

⁵ To standardize the entry of “Contact” types, I have hidden common types in the cells below “Contact” so that one or two keystrokes will automatically place the desired text in the Contact cell, using QP’s QuickType feature.

To change any of those listings (in particular, to add “results” to an existing line), find the listing in the white field below “Other Contacts” in the bottom right of the screen. Make your changes there. Make sure that you have selected one of the cells you changed, and then click the [\[Update Contact Data\]](#) button. This will find the line in the **Lawyer** Database and make it match the contact information for the line of the cell that you selected.

How to send email to this person.

The [\[Send Email ->\]](#) button sends an e-mail to the current person’s email address.

How to make an envelope addressed to this person.

The [\[Envelope ->\]](#) button sends an e-mail to the current person’s email address.

How to jump to the data source.

To jump immediately to the **Lawyer** database, press the [\[-> Lawyer Data\]](#) button.

G. The Main Databases

The next set of pages house the main databases for the notebook. Each has a common structure. The database begins in cell A1. Row 1 contains the headers or field names for each database. Those rows are “locked” (using View > Locked Titles), and **QuickFilters** (using Tools > QuickFilters) are applied. The data entries appear below. In the **Cases** and **People** databases, a unique number is placed in column A by which the correct record can be most easily identified and found. For columns that expect to receive only labels (e.g., telephone numbers and street addresses) or dates, I select the column and apply the appropriate “constraint” ([F12]/Selection Properties > Constraints).

1. The Cases database and sheet

The **Cases** database was already discussed above in connection with the **CaseView** screen, starting at p. [20](#), particularly regarding the closing and opening of cases.

To the right of the **Cases** database, there is a block of cells that is useful for slightly more complex querying of the database by macro.⁶ This technique has already been used in connection with the [\[Search\]](#) button on the **Zenas** page, as discussed above on p. 18.

W	X	Y	Z	AA
Case#	Client	Type	Closed#	
		Appeal		Search Cases
Case#	Client	Type	Closed#	
1047	1047-1048-1049-1050-1051-1052-1053-1054-1055-1056-1057-1058-1059-1060-1061-1062-1063-1064-1065-1066-1067-1068-1069-1070-1071-1072-1073-1074-1075-1076-1077-1078-1079-1080-1081-1082-1083-1084-1085-1086-1087-1088-1089-1090-1091-1092-1093-1094-1095-1096-1097-1098-1099-1100-1101-1102-1103-1104-1105-1106-1107-1108-1109-1110-1111-1112-1113-1114-1115-1116-1117-1118-1119-1120-1121-1122-1123-1124-1125-1126-1127-1128-1129-1130-1131-1132-1133-1134-1135-1136-1137-1138-1139-1140-1141-1142-1143-1144-1145-1146-1147-1148-1149-1150-1151-1152-1153-1154-1155-1156-1157-1158-1159-1160-1161-1162-1163-1164-1165-1166-1167-1168-1169-1170-1171-1172-1173-1174-1175-1176-1177-1178-1179-1180-1181-1182-1183-1184-1185-1186-1187-1188-1189-1190-1191-1192-1193-1194-1195-1196-1197-1198-1199-1200-1201-1202-1203-1204-1205-1206-1207-1208-1209-1210-1211-1212-1213-1214-1215-1216-1217-1218-1219-1220-1221-1222-1223-1224-1225-1226-1227-1228-1229-1230-1231-1232-1233-1234-1235-1236-1237-1238-1239-1240-1241-1242-1243-1244-1245-1246-1247-1248-1249-1250-1251-1252-1253-1254-1255-1256-1257-1258-1259-1260-1261-1262-1263-1264-1265-1266-1267-1268-1269-1270-1271-1272-1273-1274-1275-1276-1277-1278-1279-1280-1281-1282-1283-1284-1285-1286-1287-1288-1289-1290-1291-1292-1293-1294-1295-1296-1297-1298-1299-1300-1301-1302-1303-1304-1305-1306-1307-1308-1309-1310-1311-1312-1313-1314-1315-1316-1317-1318-1319-1320-1321-1322-1323-1324-1325-1326-1327-1328-1329-1330-1331-1332-1333-1334-1335-1336-1337-1338-1339-1340-1341-1342-1343-1344-1345-1346-1347-1348-1349-1350-1351-1352-1353-1354-1355-1356-1357-1358-1359-1360-1361-1362-1363-1364-1365-1366-1367-1368-1369-1370-1371-1372-1373-1374-1375-1376-1377-1378-1379-1380-1381-1382-1383-1384-1385-1386-1387-1388-1389-1390-1391-1392-1393-1394-1395-1396-1397-1398-1399-1400-1401-1402-1403-1404-1405-1406-1407-1408-1409-1410-1411-1412-1413-1414-1415-1416-1417-1418-1419-1420-1421-1422-1423-1424-1425-1426-1427-1428-1429-1430-1431-1432-1433-1434-1435-1436-1437-1438-1439-1440-1441-1442-1443-1444-1445-1446-1447-1448-1449-1450-1451-1452-1453-1454-1455-1456-1457-1458-1459-1460-1461-1462-1463-1464-1465-1466-1467-1468-1469-1470-1471-1472-1473-1474-1475-1476-1477-1478-1479-1480-1481-1482-1483-1484-1485-1486-1487-1488-1489-1490-1491-1492-1493-1494-1495-1496-1497-1498-1499-1500-1501-1502-1503-1504-1505-1506-1507-1508-1509-1510-1511-1512-1513-1514-1515-1516-1517-1518-1519-1520-1521-1522-1523-1524-1525-1526-1527-1528-1529-1530-1531-1532-1533-1534-1535-1536-1537-1538-1539-1540-1541-1542-1543-1544-1545-1546-1547-1548-1549-1550-1551-1552-1553-1554-1555-1556-1557-1558-1559-1560-1561-1562-1563-1564-1565-1566-1567-1568-1569-1570-1571-1572-1573-1574-1575-1576-1577-1578-1579-1580-1581-1582-1583-1584-1585-1586-1587-1588-1589-1590-1591-1592-1593-1594-1595-1596-1597-1598-1599-1600-1601-1602-1603-1604-1605-1606-1607-1608-1609-1610-1611-1612-1613-1614-1615-1616-1617-1618-1619-1620-1621-1622-1623-1624-1625-1626-1627-1628-1629-1630-1631-1632-1633-1634-1635-1636-1637-1638-1639-1640-1641-1642-1643-1644-1645-1646-1647-1648-1649-1650-1651-1652-1653-1654-1655-1656-1657-1658-1659-1660-1661-1662-1663-1664-1665-1666-1667-1668-1669-1670-1671-1672-1673-1674-1675-1676-1677-1678-1679-1680-1681-1682-1683-1684-1685-1686-1687-1688-1689-1690-1691-1692-1693-1694-1695-1696-1697-1698-1699-1700-1701-1702-1703-1704-1705-1706-1707-1708-1709-1710-1711-1712-1713-1714-1715-1716-1717-1718-1719-1720-1721-1722-1723-1724-1725-1726-1727-1728-1729-1730-1731-1732-1733-1734-1735-1736-1737-1738-1739-1740-1741-1742-1743-1744-1745-1746-1747-1748-1749-1750-1751-1752-1753-1754-1755-1756-1757-1758-1759-1760-1761-1762-1763-1764-1765-1766-1767-1768-1769-1770-1771-1772-1773-1774-1775-1776-1777-1778-1779-1780-1781-1782-1783-1784-1785-1786-1787-1788-1789-1790-1791-1792-1793-1794-1795-1796-1797-1798-1799-1800-1801-1802-1803-1804-1805-1806-1807-1808-1809-1810-1811-1812-1813-1814-1815-1816-1817-1818-1819-1820-1821-1822-1823-1824-1825-1826-1827-1828-1829-1830-1831-1832-			

Note the structure in Cases:W1..Z3. The Criteria Table for a search of the **Cases** database is in the top two rows of this table (W1..Z2). However, only formulas are placed in W2..Z2, and these refer to the text in W3..Z3. The formulas in W2..Z2 are masked because they are precisely written to enable more complex

⁶ To query a QP database manually, use the **Tools > Data Tools > Notebook Query** menu.

searching of the database, and masking gives a visible sign not to write other search terms there.

Thus, the user can easily enter names, types of cases, etc. into W3..Z3, press [\[Search Cases\]](#), and the formulas in W2..Z2 will correctly render them for typical purposes of searching, with the output generated in the rows starting with W7..Z7. In the example shown here, placing “Appeal” into the “Type” field at Y3 causes the query to list all cases in which the word “appeal” appears anywhere in the “Type” of case category. The formulas also allow greater flexibility. The formula in U2 allows the user to put “o” in U3 to select only open cases, or “x” to select only closed cases.

2. The People database and sheet

The **People** database was also discussed above, in connection with adding people to the **CaseView** screen on a case. See particularly p. 26, above.

To the right of that database is a block containing three search methods, one for name and city, one for phone number, and one for email address, which looks like this.

AA	AB	AC	AD	AE	AF
PNo	NameLast	NameFirst	Sr	City	
	Elliott				Search People
PNo	NameLast	NameFirst	Sr	City	Search Phone Numbers
				Macon	
				Norcross	Search Email Addresses
				Atlanta	

To search for a name and city, enter all or parts of either into the yellow fields at AA3..AE3 and press [\[Search People\]](#). Matches will appear in AA7..AE7 and below.

To search for people with a phone number, click the [\[Search Phone Numbers\]](#) button. An inputbox will appear, asking for all or part of a phone number. Enter the (partial) number. Zenas will show any matches for the (partial) phone number that appear in any of the three columns for phone numbers in the **People** database. Therefore, it is important to use the same format for all entries of phone numbers in the **People** database. This button also appears on the **Zenas** main page, for quick access when a phone call comes in.⁷

To search for people with an email address, click the [\[Search Email Addressess\]](#) button first. An inputbox will appear, asking for all or part of the email address. Enter the (partial) address. That (partial) address will appear in the yellow field, and Zenas will show any matches in the same space. Here, the last search looked for the email segment “smith,” and it returned eighteen names with “smith” somewhere in the username or in the domain name.

⁷ As a development of this, I put a shortcut to the ZenasPhoneNo.wcm macro on my windows desktop and assigned a keystroke shortcut to that macro. Thus, even if Zenas is not open, I can invoke the macro, type in a partial phone number, and Zenas will open with a search for persons with that partial phone number in its database.

3. The Actor database and sheet

The **Actor** database was also discussed above in connection with generating the parties involved with the case on the lower left side of the **CaseView** screen, above at p. 20. The concepts of an Actor's **Set** and **Role** were also discussed in connection with adding a person to a case, above at p. 26. This database provides the “glue” that links the cases with the people and businesses. Columns A..D contain that glue, and by keeping it correctly sorted by **Case#** and **Set**, it keeps all of the records straight on the **CaseView** page. Macros automatically enter records when people and businesses are added in the **CaseView** screen and then keep them properly sorted.

I have not coded the **removal** of records (as where the wrong person is incorrectly added to a case or no longer involved with it). That must be done manually, or you may try your hand at coding it. When manually deleting or inserting rows, remember the caution noted above at p. 14.

If you are uncertain which person or business a particular **PNo** refers to, select that cell and press **[Ctrl+Shift+P]**. A window will pop up showing information from the **People** database. If you are uncertain which case a **Case#** refers to, select it and press **[Ctrl+Shift+Q]**. Another window will pop up showing information from the **Cases** database.

How to list relevant actors.

To the right of the database, there is another search form. It allows you to list all persons who have any connections with your cases based on the search criteria you enter in the yellow cells.

L	M	N	O	P	Q	R	
Case#	PNo	Set	Role				
1825			ATT,REF	List Actors			
			e.g. ATT,CL,K,CLI				
Case#	PNo	Set	Role	Name	Email	MM1	MM2
1825	883	1	REF	Thomas Jones	thomasj@hawaii.com	Mr. Jones Thomas	111 1st
1825	887	1	REF	Christopher Lawrence K	chris@hawaii.com	Mr. Lawrence K. Christopher	111 1st
1825	1996	4	ATT	Charles Allen K	charles@hawaii.com	Mr. Allen K. Charles	111 1st
1825	1999	4	ATT	Walter David K	walter@hawaii.com	Mr. David K. Walter	111 1st

Typing a case number into L3 limits the search to people involved with a case; leaving it blank searches in all cases. The search can be narrowed by putting one or more **Role** into O3. This example finds everyone connected with Case# 1825 that is either a referral source (REF) or an attorney (ATT), when those terms are placed in the yellow cells and the **[List Actors]** button is clicked. The macro also provides the name and email address of the persons selected.

Pressing the **[Mail Merge in WP]** button uses my envelope template to make envelopes in WordPerfect for those same people. If you don't want to make an

envelope for everyone listed, delete the PNo entry in the M column for all persons to be excluded.

Pressing the [\[Email All\]](#) button generates email addresses in the Q column for those actors, which addresses can be copied into an outgoing email. These steps are illustrated in the help file [EmailingMultipleActors.pdf](#). Note, however, that the initial font (currently Arial 8) governing the first cell (currently Actor:P7) will usually appear to govern the first addressee. This is an annoyance in the transfer, as noted [here](#), but it is easily fixed by deleting the codes imported from QP. I usually backspace twice.

4. The Lawyers database and sheet

The **Lawyers** database should be thought of as a “Contact-Event” database, for reasons explained above at p. 44 in connection with the **Contacts** sheet, but 99.9% of my contact-events are with Lawyers. Hence, the name.

1	A	B	C	D	E	F
		Date Sort				
	PNo	Date	Contact	Details	Results	<- Contacts
4353	737	12/24/14	List Q	Receiving contact - update error		
4354	343	01/05/15	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4355	260	01/05/15	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4356	332	01/06/15	Direct Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4357	1441	01/06/15	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4358	1905	01/06/15	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4359	756	01/08/15	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4360	304	01/08/15	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4361	814	01/08/15	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4362	415	01/08/15	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4363	171	01/09/15	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4364	184	01/13/15	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4365	178	01/13/15	Direct Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4366	1972	01/13/15	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4367	78	01/14/15	Direct Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases		
4368						

This tells me that I had contact with the people in the A column on the date in the B column. The type of contact is given in the C column (with “Direct Q” being generally a call or email directed to me and a “List Q” being an email to a email listserv that I answered. There are a few other categories as well, such as when I contact them, when they mention me to others, etc. A quick summary is stored in column D, and any follow-up is stored in column E.

As in other cases, if you want to know which person a particular **PNo** refers to, select that cell and press **[Ctrl+Shift+P]**. A window will pop up showing information from the **People** database.

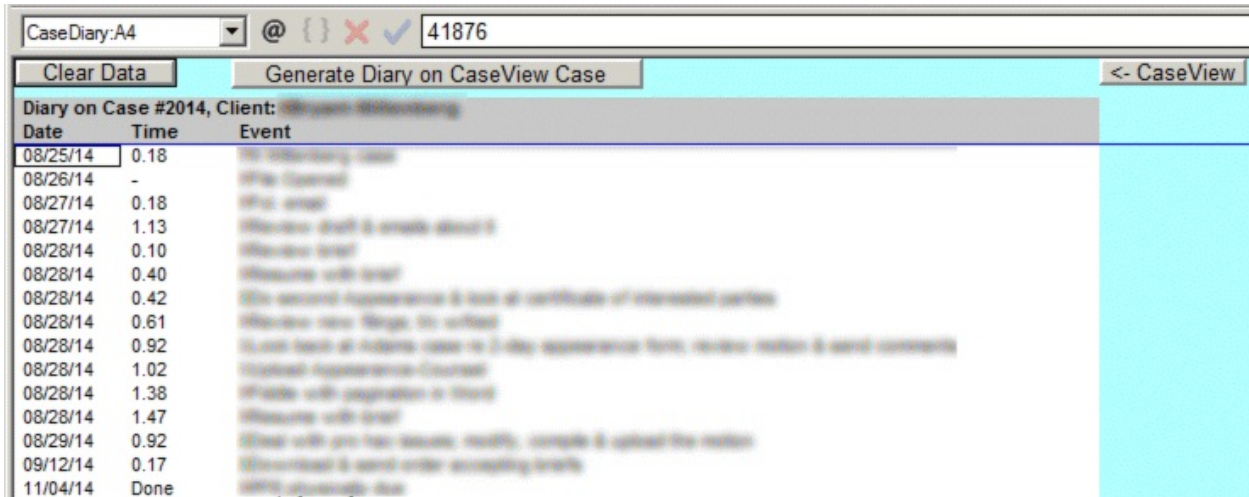
L	M	N	O	P	Q	R
	PNo	Date	Contact	Details	Results	<- Contacts
				Search Lawyers		
				necessity		
				8 matches		
	PNo	Date	Contact	Details	Results	Contact's Name
	341	04/26/07	Direct Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases
	387	06/28/07	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases
	797	11/03/07	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases
	152	11/18/07	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases
	291	11/11/08	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases
	745	03/01/11	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases
	1876	06/19/12	List Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases
	421	05/06/13	Direct Q	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases	Receiving 2011 JPLA map from changed approach - remains to be seen in ordinary cases

To the right of the **Lawyers** database, there is another block for searching contact-events. You can limit it by type of contact by entering some term in O3, but the main use will be to search for a term in each contact. In this example, I searched for the term “sj” (summary judgment) by entering sj in P3 and clicking the **[Search Lawyers]** button. This listed every contact-event in the database in which sj occurs in reverse chronological order (most recent listings at the top). There are also formulas in the R column to identify the person making the contact by name.

H. Reports and Utility Sheets

The sheets between the databases and the financial sheets are places where reports and utility programs appear. Several have already been addressed.

1. Case Diary



Date	Time	Event
08/25/14	0.18	File Attorney case
08/26/14	-	File closed
08/27/14	0.18	File case
08/27/14	1.13	Attorney draft & email about it
08/28/14	0.10	Attorney brief
08/28/14	0.40	Attorney with brief
08/28/14	0.42	File second appearance & look at certificate of interested parties
08/28/14	0.61	Attorney new filing to reflect
08/28/14	0.92	Look back at Atlanta case re 2-day appearance form, review notes & send comments
08/28/14	1.02	Upload Appearance-Covered
08/28/14	1.38	Attorney with migration in third
08/28/14	1.47	Attorney with brief
08/29/14	0.92	Attorney with pro hac status, modify, complete & upload the notes
09/12/14	0.17	Attorney brief & send order accepting briefly
11/04/14	Done	APPD approved case

The **CaseDiary** sheet compiles all events in the Zenas databases on each case. Click the [\[Generate Diary on this Case\]](#) button, and Zenas will take you to the **CaseDiary** sheet, where it combines chronological information from the **Cases**, **Time**, **Billings**, and **Deadlines** archive databases in chronological order.

2. Status Report

CASELOAD STATUS REPORT					
Update Report		Print Report (5Cols)		<- Deadlines	
Last Update:		01/21/15		10:57:38 AM	
Case#	Client	Type	Due	Next Event	Status (Active if blank)
554	Indian Hill Services	Pro Bono	02/06/15	Pro Bono	
590	Indian Hill Services	Pro Bono	ERR		
1796	Indian Hill Services	Pro Bono	02/23/15	Pro Bono	
1819	Indian Hill Services	Pro Bono	01/17/15	Pro Bono	
1825	Indian Hill Services	Pro Bono	03/30/15	Pro Bono	
1934	Indian Hill Services	Pro Bono	01/26/15	Pro Bono	
1938	Indian Hill Services	Pro Bono	01/30/15	Pro Bono	
1976	Indian Hill Services	Pro Bono	03/30/15	Pro Bono	
1978	Indian Hill Services	Pro Bono	01/30/15	Pro Bono	
1982	Indian Hill Services	Pro Bono	02/01/15	Pro Bono	
2004	Indian Hill Services	Pro Bono	03/30/15	Pro Bono	
2005	Indian Hill Services	Pro Bono	01/30/15	Pro Bono	
2007	Indian Hill Services	Pro Bono	05/25/15	Pro Bono	
2013	Indian Hill Services	Pro Bono	02/25/15	Pro Bono	
2014	Indian Hill Services	Pro Bono	01/30/15	Pro Bono	
2016	Indian Hill Services	Pro Bono	01/30/15	Pro Bono	
2017	Indian Hill Services	Pro Bono	01/30/15	Pro Bono	
2024	Indian Hill Services	Pro Bono	02/02/15	Pro Bono	
2025	Indian Hill Services	Pro Bono	01/19/15	Pro Bono	
2027	Indian Hill Services	Pro Bono	02/27/15	Pro Bono	
2028	Indian Hill Services	Pro Bono	02/06/15	Pro Bono	
2029	Indian Hill Services	Pro Bono	01/30/15	Pro Bono	
2032	Indian Hill Services	Pro Bono	01/17/15	Pro Bono	
2033	Indian Hill Services	Pro Bono	01/20/15	Pro Bono	

This report lists all open matters (including the pro bono matters that I give numbers below 1000), and it shows the next deadline, if there is one, or **ERR** if there is none. This is discussed in more detail above at p. [36](#).

3. Suits

Another utility program is one that lists the Court-related data on each active case that is in suit. Clicking the [\[List Suits\]](#) button gives a listing that is suitable for further processing.

List Suits				
Case#	Client	Ct	DocketNo	DOFiling
1717	...	NDGa	...	12/08/09
1745	...	DeKalb Superior	...	11/03/04
1781	...	MDGa	...	06/11/08
1795	...	Columbia Superior	...	03/23/07
1796	...	NDGa	...	11/10/10
1799	...	Cobb State	...	02/05/09
1822	...	Chatham State	...	12/15/08
1825	...	NDGa	...	09/10/10
1833	...	Laurens Superior	...	02/22/11
1837	...	Butts Superior	...	
1857	...	Bibb Superior	...	
1858	...	Bibb Superior	...	10/22/10

4. Problem Cases

The Problem Cases list is intended to list four kinds of cases that might be problematic. A weekly check of this list should help address any problems before they arise. Note that this program is set for problems arising out of Georgia's civil procedure rules, and therefore you should consider altering it if you need different information.

Problem Case Report			<- Cases Data		
Statute of Limitations			Cases Not in Suit		Five Year Rule
DOA	Case#	Client	Case#	Client	Case# Client LastEvent
07/10/10	1819		1819		
	1834		1834		
	1839		1839		
	1845		1845		
	1860		1860		
	1861		1861		
	1865		1865		

By pressing the [\[Problem Case Report\]](#) button, Zenas gives information in these four categories:

1. Statute of Limitations.

This block lists every active case (treating these as having a **Case#** of 1000 or greater and no **Closed#**) in the **Cases** database in which the statute of limitation (calculated from the date of the cause of action under **D/CoA** and the number of years under **Stat**) would expire within 60 days (or has already expired).

It will also list each case in which a date of cause of action or statute date are unknown, so if the case may involve litigation, this listing will encourage an early determination of the litigation deadlines.

Litigation deadlines are not suitable for every case, of course, for a number of reasons. In order to avoid such cases being listed as Problem Cases, you may place a text explanation in the **Stat** column (such as "n/a") for that case. Zenas will then ignore it when generating this list.

2. Cases Not in Suit.

The Cases Not in Suit list is very similar in function to the Statute of Limitations list. Its slightly different orientation is to advise you that a case is more than two years old without a suit being filed (and unknown dates of the Cause of Action will result in a listing here). It is thus an extra check against a suit languishing, even if the statute of limitation has not run.

And as with the Statute of Limitations list, a text explanation in the **Stat** column such as "n/a" will prevent the case from being listed here too.

3. Five Year Rule.

There is a rule of Georgia practice that a case in suit in which no order has been taken in five years is automatically dismissed, without further action by the

parties or court. For each case that is in suit, this determines the point that is five years after the date the suit is filed (**D/Filing**) or the date of the last order (**D/LastOrder**), whichever is later, and if that date will run in the next 180 days, the case is listed.

That user may prevent this case from being listed by entering a later date in the **D/LastOrder** column. And if there is no later order from the court, the user will have ample time to get the case ready for trial or to obtain an order from the trial court that would start the five year period running again.

4. Inactive Cases.

The last block shows cases in which Zenas records no activity in the prior 180 days, as shown in the **D/LastAxn** column of the **Cases** database. The point is to avoid cases languishing. Zenas automatically updates that entry when the case is opened, when the user marks a deadline done on the **Deadlines** page, when the user sends an email from the **CaseView** page, or when the user opens the mind map from the **CaseView** page. You may, of course, change the macro to allow more or less time, and other routines could be set to update this field of the **Cases** database.

5. TEntry and TData rules for deadlines

These two pages supply the interface for adding rule-based ticklers and the rules, respectively.

On the **TEntry** page, the user will select from categories and subcategories of ticklers/deadlines and then enter a starting date. These steps are illustrated in the help file [AddingRuleBasedDeadlines.pdf](#).

The categories and subcategories come from the **TData** page, which appears below.

A	B	C	D	E	F	G
		<- Ticklers	TriggerDate	12/19/11		
			Deadline1		Deadline2	
Category	Subcategory	TriggerName	Text	Offset	Text	Offset
Presuit	Ante Litem - city	D/CoA	Ante Litem - city	183		
	Ante Litem - county	D/CoA	Ante Litem - county	366		
	Ante Litem - state	D/CoA	Ante Litem - state	366		
	Stat runs - 1 yr	D/CoA	Stat runs - 1 yr	366		
	Stat runs - 2 yrs	D/CoA	Stat runs - 2 yrs	731		
	Stat runs - 4 yrs	D/CoA	Stat runs - 4 yrs	1461		
	Stat runs - 6 yrs	D/CoA	Stat runs - 6 yrs	2192		
	Stat Repose Runs - 5 yrs	D/CoA	Stat Repose Runs - 5 yrs	1827		
Suit filed	Answer - GA	D/Service	Answer Due	30		
	Answer after service - Fe	D/Service	Answer or M/Dismiss Due	21		
	Answer after M/Dismiss	D/Denial of M/Dismiss	Answer Due	14		
	Five Year Rule - GA	D/Filing	Five Year Rule Runs - 5 yrs	1827		
	Case deadlines - GA	D/Defendant answers	Discovery ends in 2 months	122	Discovery ends (6	183
	Case deadlines - Fed - N	D removes/appears	Certif. Interested Persons	0	R26f Conference - I	16

The TData sheet has already been discussed in connection with the entry of rule-based deadlines, starting on p. 33. The macro that generates deadlines lists categories from Column A, and upon the selection of one of them, gives its subcategories in Column B. Upon the selection of one of them, the user is asked about the triggering date of the event in Column C associated with the chosen subcategory. It takes that date and calculates all offset dates on the same row and then enters each deadline with its offset on the **Deadlines** page.

Thus, to create a new deadline, find a suitable category in column A or create

your own. Add enough detail to the subcategory in column B to let you know when to choose it. Put the text calling for the triggering date in Column C. (I use “D/” to mean the “Date of.”) Put the first deadline as you want it to appear on the **Deadlines** page into the D column and either a number or a formula that calculates the number of days in the E column. Repeat the last two items for every other deadline that can be calculated on the basis of the same triggering event.

See also the discussion of modifying a rule-based deadline above at p. [34](#).

6. Logs

I use the **Logs** sheet to store data on cases.

Columns A to H store deadlines that have been marked done by the [\[Deadline Done\]](#) macro on the **Deadlines** page. This preserves a record of when I dealt with a deadline without leaving it on the **Deadlines** page. These will be purged annually.

Columns N to Q formerly stored the times during the day at which I select a particular client. The original idea was to use this log to help track my time on cases, to assist with entries in the **TimeSheet** page. It can still be used for that purpose, but since implementing it, I use the Titlelog time tracker, as described on p. [39](#). To use it again, place calls to **{Macs:R5}** at strategic spots in the macros.

Columns S to W store the time it takes various courts to rule on various matters, particularly appellate courts. By sorting it with the [\[SortCtTurnaround\]](#) button, I get a range of time in which to expect rulings.

Columns Y to AA store information about closed cases. In particular, for each box of closed cases, it calculates the latest date on which any of the files in the box was closed. Then, using a formula, it calculates the date four years later on which the box may be purged.

Columns AI to AJ store details on changes made in the Zenas program.

I. The Financial Databases

Turning to the databases having to do with money, I have found it convenient to have five databases:

- **Time** - to keep track of the attorney's time on cases.
- **Costs** - for all out-of-pocket costs on a case and other items (such as mileage) that I want to remember when it is time to pay my taxes.
- **Billings** - to list billings and balances on each of the cases for which there are such. (Not for the typical contingent fee case.)
- **Book** - An overview of unbilled time spent, fees earned, costs, balances, and recent billing history on each active case.
- **Operating** - this is essentially the business's checking account.
- **Trust** - this is the business's trust account.

In most respects, these should be straightforward, but I would call attention to the following points and features.

1. The Time database

The **Time** database should be largely self-explanatory.



Date	Time	Case#	Hrs	Work	Status
01/09/15	03:10 PM	2024	1.02	Research work	
01/09/15	04:19 PM	2024	0.28	Research work	
01/09/15	04:36 PM	2013	0.10	This will keep	
01/10/15	11:45 AM	2032	0.60	Review pleadings & file on franchise matter	
01/11/15	08:15 AM	2024	0.18	Client response	
01/12/15	09:38 AM	2027	0.28	Client requested no action	
01/12/15	10:43 AM	2005	0.12	This will be action on litigation	
01/12/15	01:43 PM	2024	0.28	Research	
01/12/15	02:00 PM	2005	1.32	Travel & research to talk about cases, to will Collins	
01/12/15	03:19 PM	1825	0.05	Research & email / follow	
01/12/15	03:22 PM	2024	6.72	Research	
01/13/15	09:06 AM	1825	0.45	Research, update email / follow	
01/13/15	09:33 AM	590	0.68	This is campaign	
01/13/15	10:14 AM	1825	0.08	Follow-up email re survey	
01/13/15	10:30 AM	2033	0.13	Work thoughts in 30 second entry	
01/13/15	10:48 AM	2025	0.05	Confirm that record is complete	
01/13/15	01:32 PM	2024	7.83	Research writing Case 1-3 for other	
01/14/15	09:36 AM	2024	0.13	File PDF & send	
01/14/15	09:44 AM	2027	3.05	Review letter & draft response	

The starting times are kept in the second column primarily to allow the records to be sorted in correct temporal sequence. These records come from the **TimeSheet** page for every entry with a **Case#** greater than 0, and thus it includes the pro bono cases that have numbers below 1000 in my system, as seen in the third column.

The final column, representing the “Status” (see discussion of “status” beginning at p. [41](#) above) is set by macro when the user submits a bill (the macro

marks it as “1”) by clicking the [\[Final Bill\]](#) button on the **Bill** page (see p. 40). A blank in that column indicates that no bill has been prepared.

The data on this page may be sorted chronologically by pressing the [\[Sort Time\]](#) button or sorted by Case Number, using the [\[Sort Cases\]](#) button.

To the right of this data, there is an area for getting a listing of all unbilled hourly fee time, generated by clicking the [\[Detail Unbilled Hourly Time\]](#) button.

Detail Unbilled Hourly Time				
Case#	Client	Date	Hrs	Work
1825	Alabara, Christine (Jill)	01/12/15	0.05	Review briefs & email J. Alabara
1825	Alabara, Christine (Jill)	01/13/15	0.45	Review replies, email J. Alabara
1825	Alabara, Christine (Jill)	01/13/15	0.08	Review up email to court
1825	Alabara, Christine (Jill)	01/15/15	0.25	Review briefs & email J. Alabara re invitation to leave things as is
1976	Thompson, Sharon (Jill)	10/02/14	0.22	Review order & email quick thoughts to J. Broadbent
1982	Hight, Christopher (Jill)	10/21/14	0.20	Respond to email on what issues are likely to interest J. Broadbent
1982	Hight, Christopher (Jill)	10/31/14	0.35	Read part of J. Broadbent's proposed order, and comment by email on it
1982	Hight, Christopher (Jill)	10/31/14	0.42	File with court
1982	Hight, Christopher (Jill)	11/03/14	0.98	Review and respond to J. Broadbent's order
1982	Hight, Christopher (Jill)	11/17/14	1.40	Review briefs & email for confirmation, start watching argument again
1982	Hight, Christopher (Jill)	11/17/14	1.51	Review watching argument, send email (case 1 & 4 for other)
2005	Alabara, Christine (Jill)	11/17/14	0.08	Review briefs & email re arguments in J. Broadbent's case
2005	Alabara, Christine (Jill)	01/06/15	0.33	Review in judge's order to proposed order, file with J. Broadbent, email on setting time to file
2005	Alabara, Christine (Jill)	01/12/15	0.12	File with J. Broadbent on J. Broadbent's
2005	Alabara, Christine (Jill)	01/12/15	1.32	Review J. Broadbent's order about issues, file with J. Broadbent
2005	Alabara, Christine (Jill)	01/15/15	7.83	Review order (case 1 & 4 for other)
2005	Alabara, Christine (Jill)	01/16/15	1.03	Review proposed order, mostly from my recent J. Broadbent's case
2005	Alabara, Christine (Jill)	01/16/15	2.25	Review order, email J. Broadbent (case 1 & 2 for other)

I wrote this report to help me decide whether time billed was significant enough to warrant sending a bill.

2. The Costs database and sheet

This database is intended to be a complete listing of the costs of doing business. It serves two particular purposes:

- It is where I store all costs that should be charged to a client. The **Bill** page looks through the data in this database to determine what the client has and has not paid when preparing a bill.
- It is where I store all other expenses that I want to track for tax purposes. A macro on the **Operating** account page automatically adds items to this database. You must add everything else on this page. In my case, this is mainly mileage, things paid for in cash, credit card, or from the personal checking account.

A	B	C	D	E	F	G	H
Sort		Standard Costs					
Date	Case#	Payee	Purpose	Amount	Status	Miles	
09/26/14	2005	Thompson County State Court 88.75	File with court & serve copy	\$42.35	1	84.7	
10/02/14	503	CPA	Legislative seminar	\$49.00			
10/07/14	2007	Thompson County Superior Court 81.75	Check record on appeal	M	1	162.6	
10/08/14	0	Post Office	Return fee	\$84.00	1		
10/14/14	2005	Thompson County 45.35	Attend hearing on Motion Trial	\$22.65	1	45.3	
10/15/14	0	Stamps	Buy 121 stamps - 1st class postage	\$133.72			
10/15/14	0	Thompson County 13.15	Buy office supplies	M	1	13.1	
11/20/14	0	Thompson County 188.55	Attend seminar	M	1	188.5	
11/20/14	0	Wells	Transfer on A/C	\$359.00			
12/05/14	1934	Thompson County Superior 81.75	Check record on appeal	\$81.70	1	163.4	
12/24/14	2013	Post Office	Stamps	\$17.35	1		
01/04/15	2013	Wells Fargo	State article	\$4.42	1		
01/04/15	2013	Thompson County 7.25	State article	M	1	7.2	
01/05/15	2013	Thompson County Superior 81.75	Cash argument	\$81.30	1	162.6	
01/05/15	2013	Thompson County Superior 81.75	Cash argument	\$9.00	1		
01/16/15	2005	Post Office	Stamps	\$5.75			
01/16/15	0	Thompson County 5.95	Stamps	M	1	5.9	
01/16/15	2024	Post Office	Stamps	\$3.22			

Costs should be entered as they are incurred. Where the cost relates to normal operations rather than a case, use “0” instead of the case number.

Mileage distances are calculated using MapQuest, and mileage rates are determined by multiplying the distance by the variable **MileageRate**, the current rate approved by the IRS and stored in cell P7. I typically do not charge the client for the mileage for short runs (say, to the post office), and therefore I enter a “1” as the status code (see discussion of “status” beginning at p. 41 above) so that the client is not charged for it, though I certainly want to note it for tax purposes.

Standard Costs.

To make certain repetitive cost entries easier, click the **[Standard Costs]** button. Doing so takes you to a place to the right of the database (T1..X25) where common costs are kept. Select the cost entry (entries) and press **[Enter]**. The numbers are entered into the database. You should freely modify these cost entries to include your repetitive cost entries.

Purging data.

You may not need to purge data in this Time Database or the Costs Database, but I do so annually. At the end of a calendar year, I save the notebook with a designation like Zenas_2011.qpw. After that, I return to Zenas.qpw and sort the time database by case. I select entries for each case that has been closed and press the [\[Delete\]](#) key.⁸ I do likewise for Cost items that are not related to a case. I then re-sort it by Date and Time to return to its normal, chronological order.

⁸ Do NOT select the entire row and press delete, because data to the right of the database may be deleted. See the discussion at p. [14](#).

3. The Billings database and sheet

The **Billings** database keeps a history of the payment status on cases.

Date Sort	Case Sort	<- Bill on Case			
Date	Case#	Client	Amount	Event	Balance
12/17/14	2022	Michigan County (County of Wayne)	-\$1,279.65	Pay	\$0.00
12/19/14	1934	Michigan County	\$1,029.20	Stm	\$1,029.20
12/19/14	1825	Michigan County (County of Wayne)	\$6,675.00	Stm	\$6,675.00
12/20/14	2028	Michigan County	\$1,028.85	Stm	\$1,028.85
12/18/14	1745	Michigan County (County of Wayne)	\$8,750.00	Stm	\$8,750.00
12/31/14	2028	Michigan County	-\$1,028.85	Pay	\$0.00
01/05/15	1825	Michigan County (County of Wayne)	-\$6,675.00	Pay	\$0.00
01/06/15	2013	Michigan County (County of Wayne)	\$2,500.00	Stm	\$2,500.00
01/06/15	1825	Michigan County (County of Wayne)	\$3,050.00	Stm	\$3,050.00
01/06/15	1796	Michigan County (County of Wayne)	\$6,742.50	Stm	\$6,742.50
01/13/15	1796	Michigan County (County of Wayne)	-\$6,742.50	Pay	\$0.00
01/16/15	1978	Michigan County (County of Wayne)	-\$107.50	Pay	\$0.00
01/20/15	1825	Michigan County (County of Wayne)	-\$3,050.00	Pay	\$0.00
01/20/15	2013	Michigan County (County of Wayne)	-\$2,500.00	Pay	\$0.00

At the time of billing.

As you generate bills on the **Bill** page (see discussion beginning on p. 40), Zenas generates entries at the bottom of this list. In addition to the date, Case# and Client name, this entry includes the new fees and costs earned (Column D), the letters “Stm” (for Statement) (Column E), and the current account balance (Column F). Usually, the entry in columns D and F will be identical because the starting balance is \$0, but they easily may not be. (There may be an unpaid prior bill, or the client may have prepaid for services.) The number in Column F will be the bottom-line amount that the client owes, and it should be equal to all of the positive and negative numbers on the same Case# in the Billings database.

There is also a search block to the right of the **Billings** database.

Search Billings					
Date	Case#	Client	Amount	Event	Balance
11/01/13	1796			Stm	
					\$15,033.08
Date	Case#	Client	Amount	Event	Balance
11/30/13	1796	Michigan County (County of Wayne)	\$2,230.00	Stm	\$4,895.00
12/21/13	1796	Michigan County (County of Wayne)	\$1,464.78	Stm	\$1,464.78
03/07/14	1796	Michigan County (County of Wayne)	\$3,843.80	Stm	\$3,843.80
04/08/14	1796	Michigan County (County of Wayne)	\$364.50	Stm	\$364.50
10/09/14	1796	Michigan County (County of Wayne)	\$387.50	Stm	\$387.50
01/06/15	1796	Michigan County (County of Wayne)	\$6,742.50	Stm	\$6,742.50

You can limit the search in various ways, as by setting a starting (earliest) date for billings in the yellow cell under **Date**, or seeking only a particular **Case#** to get the full history on one case. Then clicking the **[Search Billings]** button yields results below.

Further to the right, you can get a listing of unpaid billings by clicking the **[Outstanding Bills]** button.

Outstanding Bills				
Date	Case#	Client	Billed	Balance
12/18/14	1745	Michigan County (County of Wayne)	\$8,750.00	\$8,750.00
12/19/14	1934	Michigan County	\$1,029.20	\$1,029.20

A button on the initial screen of this sheet will also generate this report and move the user to a point to see it.

4. The Book of Business: Financial Report on All Cases

The user can obtain an overview of the financial situation on all open cases, commonly called the “Book of Business,” on the **Book** page.

<- Bill										Update Report	
BOOK OF BUSINESS					Hourly	\$7,737.20	\$5.75	\$994.20	\$8,737.15	Hourly	
FINANCIAL REPORT ON OPEN CASES					Contingent	\$85,792.50	\$101.06	\$0.00	\$85,893.56	Contingent	
Updated 01/22/15					Other	\$17,390.00	\$3.22	\$0.00	\$17,393.22	Other	
					Totals:	\$110,919.70	\$110.03	\$994.20	\$112,023.93	Totals	
Case#	Client	Hours	Type	Rate	Fees	Costs	Acct. Bal.	Total Earned	Last Stmt	Age	
1796	Client Name 1		h	\$0.00				\$0.00			
1819	Client Name 2	185.07	c	\$250.00	\$46,267.50	\$6.00		\$46,273.50			
1825	Client Name 3	0.83	h	\$250.00	\$207.50			\$207.50	\$	01/06/15	
1934	Client Name 4		h	\$250.00			\$1,029.20	\$1,029.20	\$	12/19/14	34
1938	Client Name 5	108.53	c	\$250.00	\$27,132.50	\$95.06		\$27,227.56			
1976	Client Name 6	0.22	h	\$250.00	\$55.00		-\$35.00	\$20.00	\$	09/22/14	
1978	Client Name 7		h	\$250.00				\$0.00			
1982	Client Name 8	4.86	h	\$250.00	\$1,215.00			\$1,215.00	\$	08/25/14	
2004	Client Name 9	3.54	c	\$250.00	\$885.00			\$885.00			
2005	Client Name 10	13.21	h	\$250.00	\$3,302.50	\$5.75		\$3,308.25	\$	10/16/14	
2007	Client Name 11	46.03	c	\$250.00	\$11,507.50			\$11,507.50			
2013	Client Name 12	2.23	h	\$250.00	\$557.50			\$557.50	\$	01/06/15	
2014	Client Name 13	21.46	o	\$250.00	\$5,365.00			\$5,365.00			
2016	Client Name 14	0.67	h	\$250.00	\$190.95			\$190.95	\$	12/01/14	

How to generate this report.

Pressing the **[Update Report]** button generates this overview of active cases quickly. The top of the report shows totals, broken down by whether the case is contingent, uses one’s default hourly rate, or “other.” The bottom of the report shows the critical numbers on each *open* case:

Case# and **Client** Name. These come from the **Cases** database.

Hours. The numbers in this column come from the **Time** database. These hours are all unbilled (i.e., the status number is 0). This means that they reflect all time in contingent fee cases, in which no billing is typically sent, but they represent only time spent after the last billing for hourly-fee cases. The purpose of this different treatment is to see what the current value of the case is to the practitioner.

Rate. This item comes from the **Cases** database.

Fees. If the item in the “Rate” column is a number, it is treated as an hourly rate and multiplied by the number in the Hours column to generate the “Fee.” If the item in the “Rate” column is not a number, then the default hourly rate is used. Thus, in the case of hourly-fee cases, this number represents an amount that should ultimately be billed to the client and paid. In non-hourly-fee cases, and especially in contingent-fee cases, the number represents only the value of the lawyer’s time to date, which can be used for informational purposes.

Costs. The numbers in this column come from the **Costs** database. These costs are all unbilled (i.e., the status number is 0).

Balance (Acct. Bal. now). The numbers in this column come from the **Billings** database. They represent the current unpaid balance for the case, as reflected by the sum of entries in column D of the **Billings** database.

Total Due (Total Earned now). This is simply the mathematical sum of fees, costs, and current balance for each case.

Symbols. The next column places symbols (\$ or c) if fees are currently earned in hourly billable cases or if costs over \$100 are outstanding in other cases, respectively.

Last Bill (now Last Stmt). The last column shows the date of the latest billing on each case.

Past Due (now Age). To the right of the grid, Zenas calculates the number of days since the billing. The larger the number, the longer the time since the bill, and the greater concern about receiving payment.

The [\[Detailed Unbilled Hourly Time\]](#) button runs the report noted above at p. [62](#).

5. The Operating Account and sheet

The Operating Account is essentially an electronic checkbook.

Write Check			Add Expense to Case Costs/Deductions			Deposit Mileage	
Date	Check#	Case#	Other Pty	Income	Expense	X	Balance
11/21/14	Dep	2023	Various	\$200.00	\$200.00	1	\$2,380.04
11/24/14	Dep	2013	Southern Environmental	\$7,402.00	\$7,402.00	1	\$2,380.04
12/03/14	Dep	2026	Various	\$210.00	\$210.00	1	\$2,380.04
12/08/14	Dep	1952	Broadway	\$20,000.00	\$20,000.00	1	\$2,380.04
12/15/14	Dep	2016	Costly	\$2,380.00	\$2,380.00	1	\$2,380.04
12/17/14	Dep	2022	Harold	\$1,270.00	\$1,270.00	1	\$2,380.04
12/31/14	Dep	2028	Real	\$1,000.00	\$1,000.00	1	\$2,380.04
01/06/15	Dep	1825	Various	\$8,075.00	\$8,075.00	1	\$2,380.04
12/24/14	Dep	Elec	Cash back Henderson	\$40.00			\$2,417.04
12/24/14	Dep	Elec	Cash back 10% bonus	\$4.00			\$2,417.04
01/13/15	Dep	1796	Loan (Bancorp)	\$8,740.00	\$8,740.00	1	\$2,417.04
01/13/15	Dep	1745	Leah's	\$8,740.00	\$8,740.00	1	\$2,417.04
01/16/15	Dep	1978	Frederic	\$100.00			\$2,517.04
01/20/15	Dep	1825	Various	\$2,000.00	\$2,000.00	1	\$2,517.04
01/20/15	Dep	2013	Southern Environmental	\$2,000.00	\$2,000.00	1	\$2,517.04

Date, **Check#**, **Case#**, **Other Pty**, **Income** and **Expense** columns are straightforward. The **Balance** column contains formulas that calculate the then-current balance.

The next-to-last column is for balancing this register against the monthly bank statement, as explained below.

I also use this sheet to keep track of business income. Therefore, I make an entry on it even if a check coming in from a client, or a distribution from the Trust account, goes directly to my personal account. In those cases, I make an entry and put the same amount in both the income and expense columns. This does not affect the balance in the far right column, but it allows Zenas to keep track of business income.

How to write a check.

Zenas allows you to use a macro to generate a check in WordPerfect for printing.

1. Click on the row with the data which you want to convert to a check.
2. Press the **[Write Check]** button.
3. You get a confirmation request about whether you want to write that particular check. Click **[Yes]**.
4. You get an input box for the check's Memo line. Enter appropriate information and click **[OK]**.
5. The Zenas macro (**ZenasOperatingCheck.wcm**) pulls up a WordPerfect template (**Check_Operating.wpt**) and replaces codes with the data on this line of

the **Operating** sheet.⁹

6. Zenas asks if you want to place the payment into the **Costs** database. Click **[Yes]** or **[No]**, as appropriate.

7. Make any desired modifications in WordPerfect and print the check.

Adding entries to the Costs database.

At the top of the screen, there are two buttons for adding entries to the **Costs** database from the **Operating** account. You can enter the amount of the check into the **Costs** database by clicking on the row with the check and pressing the **[Add Expense to Case Costs/Deductions]** button (you will be asked to add the “Purpose” of the check). You can enter the mileage of driving a deposit to the bank into the **Costs** database by clicking on the row with the deposit and pressing the **[Deposit Mileage]** button.

How to balance the checkbook with the bank statement.

To the right of the check register, there are several formulas that help balance the books and track income.

The screenshot shows a software interface with a light green background. At the top, there are three rows of data with labels to their right: 'Income marked "1"' with a value of \$1,000.00, 'Expense marked "1"' with a value of \$1,000.00, and 'Our Adjusted Balance (Should = Bank Balance)' with a value of \$0.00. Below this is a yellow box labeled 'Enter Bank Balance' with a text input field containing '\$0.00' and the text 'This should be \$0 after balancing'. Further down, there are two rows for income tracking: 'Income in 2015' with 'Current' at \$1,000.00 and 'Projected' at \$1,000.00. At the bottom, there is a 'Select Year' section with a yellow box containing '2013' and a label 'Income in Selected Year' with a value of \$1,000.00.

To use this to balance accounts, when you receive/view a bank statement:

1. Put a “1” in the column to the left of the balance for every item that appears in the bank statement, and for every other “wash” transaction (void checks, checks passing outside the operating account).

2. Enter the balance on the banks statements in the first yellow cell shown on

⁹ Since my checks may well be of a different size and my printer may have different capabilities from yours, you will probably need to change the check template before this is useful to you.

the right. The balance should be \$0 in the cell below it. If it is not, you need to do further work to balance them.

Keeping track of income.

Below the area for balancing the checkbook, there are formulas for checking income in the current year and for a selected year. The formulas for the current year return both the actual income and the income it would project for the end of the year, if income continued at the same pace it already exhibited.

Search the Operating account.

As in other cases, there is a way to search the **Operating** account. By placing dates and numbers or formulas in the yellow cells in the search block on the right side of the **Operating** sheet and pressing the [\[Query Operating Acct\]](#) button, Zenas returns matching records. Some possible formulas are suggested below.

Query Operating Acct					
Date	Check#	Case#	Other Pty	Income	Expense
01/01/14				1	1
		e.g. 1234; +C2>0		e.g. +E2>0	e.g. +F2>0
Date	Check#	Case#	Other Pty	Income	Expense
01/08/14	1738	0	LAUNCH TRUCK		\$141.00
02/07/14	1739	0	LAUNCH TRUCK		\$141.00
02/07/14	1740	0	LAUNCH TRUCK		\$400.00
03/04/14	1741	0	LAUNCH TRUCK		\$50.00
03/19/14	Charge	0	LAUNCH TRUCK		\$5.00
04/02/14	1743	0	LAUNCH TRUCK		\$20.00
04/08/14	1744	0	LAUNCH TRUCK		\$11.00
04/08/14	1745	0	LAUNCH TRUCK		\$400.00
05/07/14	1746	0	LAUNCH TRUCK		\$200.00
05/30/14	1747	2005	LAUNCH TRUCK		\$140.00
06/05/14	1748	0	LAUNCH TRUCK		\$11.00
06/05/14	1749	0	LAUNCH TRUCK		\$211.00

In this example, I wanted all expenses since January 1, 2014. I typed the starting date into the **Date** cell, the formula $+F2>0$ under **Expense** (which returns all positive entries in the F/Expense column), and 0 (or $+E2=0$) under **Income**, which excludes lines where there is also income (otherwise, all the wash transactions would be returned).

If I had wanted to limit the same output to expenses on cases, I would have entered the formula $+C2>0$ under **Case#** (which is true for all entries in the C column greater than 0). This would have yielded only the line from 5/30/15 on case 2005.

6. The Trust Account and sheet

The Trust Account functions just like the Operating Account that was just discussed.

Write Trust Check							Deposit Mileage
Date	Check#	Case#	Other Pty	Income	Expense	X	Balance
01/22/11	1175	1550	CMC		\$1,000.00	1	\$11,748.00
01/22/11	1176	1550	CMC		\$1,000.00	1	\$10,748.00
02/04/11	1177	1804	CMC		\$1,000.00	1	\$9,748.00
01/31/11	Int	0	Interest	\$2.07		1	\$9,750.07
02/01/11	Int	0	Interest		\$2.07	1	\$9,748.00
03/02/11	1178	1802	CMC		\$200.00	1	\$9,548.00
02/28/11	Int	0	Interest	\$1.56		1	\$9,549.56
03/01/11	Int	0	Interest		\$1.56	1	\$9,548.00
03/29/11	Dep	1745	Deposit	\$7,000.00		1	\$16,548.00
03/31/11	Int	0	Interest	\$1.46		1	\$16,549.46
04/01/11	Int	0	Interest		\$1.46	1	\$16,548.00
04/21/11	Dep	1829	Deposit	\$5,000.00		1	\$21,548.00
04/30/11	Int	0	Interest	\$2.46		1	\$21,550.46
05/01/11	Int	0	Interest		\$2.46	1	\$21,548.00
05/01/11	4470	4000	CMC		\$21,548.00	1	\$0.00

The same rules apply for entering data and using the next to the last column to balance the checkbook.

One writes a check from the trust account the same way, by clicking a row and then the [\[Write Trust Check\]](#) button. The only differences are that (a) this invokes a different macro ([ZenasTrustCheck.wcm](#)) and a different template ([Check_Trust.wpt](#)), and (b) the macro knows that if the “Other Pty” is “CMC,” it should substitute my full name on the payee line. Naturally, you would modify this macro to apply to your initials and name.

You can enter the mileage of driving a deposit to the bank into the [Costs](#) database by clicking on the row with the deposit and pressing the [\[Deposit Mileage\]](#) button.

On the right of the Trust account electronic checkbook, there is a table for calculating balances, both with the bank statement and with each client for whom trust funds are held.

Current Trust Balances				
			Balance	Deposited Disbursed
Total in Trust	\$26,182.40	1589	\$26.18	\$26,182.40 \$26,182.40
Account Balance	\$26,182.40	1745	\$7,300.00	\$7,300.00 \$0.00
Extra in Account	\$26.05	1069	\$8,000.00	\$8,000.00 \$0.00
		1796	\$7,300.00	\$7,300.00 \$0.00
		1850	\$0.00	\$0.00 \$0.00
Other Income	\$0.00	1855	\$0.00	\$0.00 \$0.00
Other Expense	\$0.00	x	\$0.00	\$0.00 \$0.00
Non-Case	\$26.05	x	\$0.00	\$0.00 \$0.00
Balance	Balanced	x	\$0.00	\$0.00 \$0.00
Prior Sums in Trust				
			Balance	Deposited Disbursed
Income marked "1"	\$0.00	1514	\$0.00	\$0.00 \$0.00
Expense marked "1"	\$0.00	1516	\$0.00	\$0.00 \$0.00
Our adjusted balance	\$0.00	1523	\$0.00	\$0.00 \$0.00
		1550	\$0.00	\$0.00 \$0.00
Bank's balance	\$0.00	1585	\$0.00	\$0.00 \$0.00
Difference (\$0)	\$0.00	1602	\$0.00	\$0.00 \$0.00
		1612	\$0.00	\$0.00 \$0.00
		1698	\$0.00	\$0.00 \$0.00

How to balance this account with the bank statement.

To balance accounts with the bank, enter a 1 in the next to the last column of every entry recognized in the bank statement, and enter the bank's balance in the yellow cell at the bottom of the table to the right. The result should be \$0, as it is in the bottom left..

How to balance the account with each client.

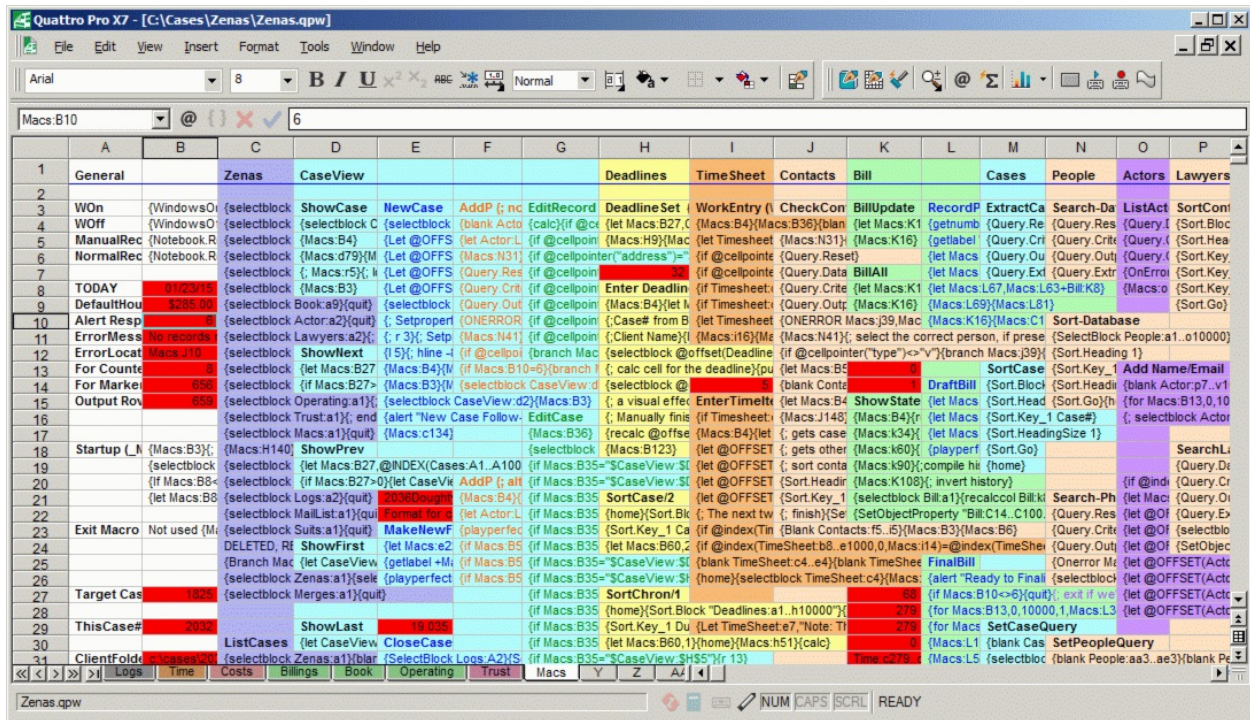
To balance accounts with each client, enter the clients' case numbers into the yellow slots in the top right. (If you hold funds for more than the 9 slots, the formulas in that block can be copied down the page.) Zenas calculates the amount deposited and disbursed for each such number and gives a total balance for each client in the white cells next to the yellow cells.

The sum of those balances for each client appears at the top left as "Total in Trust," and the difference between that number and the bank account balance is reported as "Extra in Account," which should balance with middle left block of income and expense unrelated to cases, as it does in this screen shot.

At the bottom right, there is a list of cases for which I held trust funds and later disbursed them in total. This is kept simply for my historical records. Zenas does not require that you keep them.

J. Macros - How Zenas Thinks

The macros page, shown here, is where the QP scripts reside that run when buttons are pushed. (PerfectScript macros are stored elsewhere.)



I cannot describe the details on each macro, which the reader is free to investigate, but I will note here some of the finer points. (Details on how to do some of the programming are given below in Part IV.)

First, the reader will note that the macro sheet is **color coded** so that macros on each of the other sheets can be more easily found here: the main background color for each sheet is paired with the background color for the column(s) on this macro sheet that relate to the buttons on each sheet. Columns A and B are used for general-purpose macros and data. On sheets whose macros stretch over several columns, such as the CaseView sheet whose macros are in columns D to G, readability is increased by changing the color of the text from column to column. Grouping the macros together helps find and debug them. When working on a macro, its column is widened so that its content can be read. When I finish working on the macro, I return it to the narrow width above. I leave a fair amount of vertical space between macros so that, if I add lines to one macro, I do not need to move the one below it.

Several other conventions are used. A description of the macro appears at the top of the macro in **bold**. Cells in **red** are where calculated data are stored. Comments and documentation are typically placed in yellow (or some other distinctive color) and/or italicized.

This sheet has been compiled over a long period of time, and modifications will probably continue to occur from time to time. (A diary of changes appears at [Logs:AI1](#).) This means that there are a number of macro writing techniques here. The dominant techniques are discussed in Part IV below.

Many of the macros start by invoking a macro at [{Macs:b4}](#), and they conclude with macros at [{Macs:b3}](#). This is a performance issue. [{Macs:b4}](#) turns off the redrawing of the screen while the macro is running,¹⁰ which speeds things up. After the macro is over, we want the screen to automatically update, so [{Macs:b3}](#) reverses the effects of [{Macs:b4}](#).

An earlier version of Zenas also applied manual recalculation (see the macro at [{Macs:b5}](#)) with the same idea of speeding performance, subject to resetting background recalculation — the normal state — at the end (see the macro at [{Macs:b6}](#)). This may have made a difference when Zenas used extensive functions and formulas, but that no longer is the case, for reasons detailed shortly below. In further testing, it appears that Zenas reacts as quickly, if not faster, without switching between manual and background modes of recalculation.

One issue in coding these macros is in choosing between referring to a **named cell** or a cell address. The difference is between coding a line such as [{Branch EditCase}](#) or [{EditCase}](#) on the one hand, or [{Branch Macs:G24}](#) or [{Macs:G24}](#). If all other things were equal, it would be better to use named cells because they make the macro easier to understand, and because modifications of macros with cell addresses require reviewing each line to make sure that the cell addresses are still correct. However, all things are not equal. As you modify the notebook, and especially when named cells are moved or the names deleted, Quattro Pro sometimes fails to make the expected adjustments, and a sort of **drift** results, in which a user looking at the formula would see it referring to the wrong named range, although it correctly obtained data from the correct, originally-designated range. And on some occasions, the deletion of a named range can **corrupt** the notebook.¹¹ This is **why I avoid almost all named ranges**, and macros that

¹⁰ Even so, some macros do momentarily cause row and column headers to appear and change during the execution of the macro. I have not considered the momentarily strange appearance sufficiently troubling to look deeply for a fix, assuming that a fix exists.

¹¹ QP developers, please take note of this too. These problems have been documented and discussed at WP Universe [here](#), [here](#), [here](#), and [here](#). I have limited the use of named ranges to shortcuts to macros.

If you choose to use startup and shutdown macros, they must also be named [_nstartmacro](#) and [_nbexitmacro](#), respectively. Places for macros are in cells [Macs:B18](#) and [Macs:B23](#). These are left blank in this distribution. In my personal copy, the macro resets the view on each page, alerts me if time from the prior day on the [TimeSheet](#) page

formerly used them have been modified in the past year or so to use static addresses.

In order to keep ranges static, I have attempted to hard code them. They can be hard-coded into the macro commands, but I find it easier to hard code them in the block currently at [Macs:A171..A198](#). Those addresses can be invoked in a macro by using the [@@](#) function. For example, [@@\(A171\)](#) returns the coordinates of the [Cases](#) database, and it is used in many macros in lieu of hard-coding the same block. This makes it easier to change the dimensions of a database: simply change the contents of the relevant cell.

Another feature of these macros is the level of detail used to take precise data from a database and place it precisely on the screen. Turning to the [CaseView](#) screen, each time the screen is updated with a Case#, the macro elaborately places bits of information from the [Cases](#) database across the top of the [CaseView](#) screen using macro commands at [Macs:D81..D94](#). One may ask why I do not use many formulas in those [CaseView](#) cells and almost everywhere else that they could be used. Those would be simpler, and I did so earlier, but I found two problems with this approach. First is the problem of named cell drift mentioned above: it would be difficult to explain to a user (possibly like yourself) why the formula *seems* to be pulling data from the *wrong* database, but it is actually returning correct data from the correct database. The second problem is that every time new data is entered, all formulas in the entire spreadsheet are recalculated, and over time, this slows the performance.

A related point is that [I do not use notebook queries](#) for *most* searches and representation of data, such as the Actor [Set](#) and [Role](#) entries on the bottom left of the [CaseView](#) screen or the [Deadline](#) entries on the bottom right, which are instead generated with the macro commands at [Macs:d100..d112](#) and [Macs:d126..d134](#), respectively. The reason has to do with quirks in QP's queries. Different configurations of queries can cause QP to return the wrong column, or the wrong row of information. Such quirks almost always go away when the file is saved, QP is closed, and the file is reopened in QP, but nobody should have to do that in order to get the correct information, particularly since Zenas is being offered to people who may well want to add and delete columns of information for their own purposes. The method used here requires more programming, but it yields fast, solid results.

has not been posted, and takes me to the [Deadlines](#) page.

IV. Document Assembly

Zenas relies on a PerfectScript macro for document assembly. It opens a marked-up template file in WordPerfect, and replaces the markings with data from Zenas databases about the current case, the one shown on the **CaseView** sheet (or in some instances, the **Bill** sheet). I have tried other methods of taking data from QP into WordPerfect documents¹² and find this to be the least problematic.

Marked-up template files (.WPT) are stored in the **C:\Cases\Zenas\Forms** folder. You may alter them or add others.

The user invokes them from the CaseView screen, by pressing the **[Case Forms]** button. This runs the macro at **Macs:E113**, which in turn populates a list of templates from which the user may choose. If the user chooses one, the program then merges that template with data in Zenas on that case using the **ZenasMerger.wcm** macro.

How to mark a template for merging.

Zenas allows you to insert certain codes in the template in order to place data from Zenas there.

Code in the template	Action by ZenasMerger.wcm in the template
^ CaseView:E3 ^	Types the content of CaseView:E3 (or any other cell within the carets)
^ #CaseView:D6 ^	Types the content of CaseView:D6, but the # tells WP to retain the special numeric formatting in that cell
^?Type your name ^	Get keyboard input from the user, who is told to "Type your name" in this example
^ GETACTOR ^	Selects an actor on the current case
^ THISADDRESS ^	After a person is selected with ^ GETACTOR ^, this inserts the actor's address

¹² I consider this better than: (a) copy and paste/paste special; (b) using WordPerfect's Insert > Spreadsheet > Import/Update command; (c) using a PerfectScript macro to completely build the document; and (d) WordPerfect's Merge. The last option was tried in several different ways: (1) merging directly from Zenas as the data source; (2) merging from one or more new QPW files created from Zenas; (3) merging from other types of database file created from Zenas; and (4) merging from WordPerfect DAT files generated by macro from some intervening file created from Zenas.

^CLERKADDRESS^	Inserts the address of the person identified as CLK
^ATTYNAMES^	Inserts a list of each person identified as ATT on separate lines
^ATTYADDRESSES^	Inserts a list of all attorneys and their addresses
^ALLPLAINTIFFS^	Inserts a list of all persons identified as PLA
^ALLDEFENDANTS^	Inserts a list of all persons identified as DEF
^PASTE^	Pastes the current clipboard as unformatted text
^DATE^	Inserts today's date
^SAVEFILE^	Zenas saves the current template with a file name stored in Macs:B32
^GETTIME^	Takes time data from Bill sheet (used with invoice template)
^GETCOSTS^	Takes costs data from Bill sheet (used with invoice template)

How to add to/modify the list of templates.

The list of templates is stored on **Macs:E130..E150**. There are currently 8 templates in that space, but if you need to make more than the 21 templates that would fit in that range, you would need to extend the range in cell **Macs:E113**.

Templates are listed in a particular format in that range. The name to be displayed in the file picker is at the left, the file path and name are at the right, and the two are separate by the caret ^. That format allows Zenas to display one and then use the other to open the desired file.

V. Modifying Zenas.

The following discussions show how the user may modify the database to use for his or her own purposes.

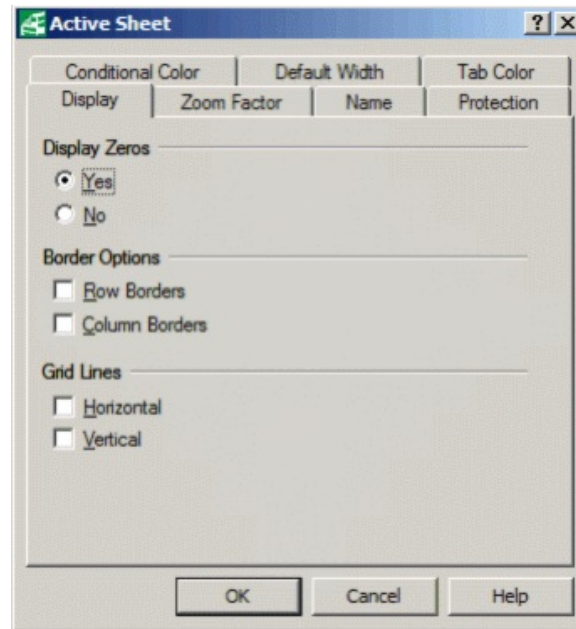
A. How to modify file locations

As noted above at p. [10](#), Zenas assumes that files are located in certain places. If I were attempting to change this system, *which I do not recommend*, I would do the following:

1. I would search the **Macs** page for every place where “c:” occurs, and change the macro code accordingly.
2. I would then open all of the Zenas macros and search for “c:”. If found, they would be changed as required. I would also do the same for form files.
3. In particular, I would need to completely re-think and perhaps substantially re-write the **ZenasClientFiles.wcm** macro, which does most of the work of finding the correct client folders.

B. How to turn the display of grid lines and column headers off and on.

For any worksheet, press **[Ctrl+F12]**, which brings up the **Sheet Properties** box. (The menu selection **Format > Sheet Properties** does the same.) Select the **Display** tab, and something like this picture will appear.



To control whether column and row headers (i.e., A, B, C, or 1, 2, 3, respectively) are shown, check or uncheck the Row and Column Borders boxes. To control whether grid lines are shown, check or uncheck the Horizontal and Vertical Grid Lines boxes.

C. How to resize the width of a column.

With the header row for columns displayed (e.g., A, B, C, etc.), move the mouse cursor to the right edge of the header for the column to be displayed. When it is in position, the pointer will change to a vertical black line with arrows pointing to the right or left. When that happens, hold down the left mouse button and drag left or right until the column has the desired width.

D. How to change or deactivate informational messages.

Zenas adds quite a few informational messages to remind the user how to enter data, not to press **[Enter]** until data is entered, and the like. These could outlive their utility, or you may prefer some other text in them. Here is how to make such changes.

First, locate the message on the **Macs** sheet. You can do this either of two ways. First, almost all of the messages are stored in column A, beginning around line 138, and you can scroll down the list. Second, you can find the macro script in question and track it down.

For example, if you wanted to find the first informational message that occurs when you push the **[New Case]** button on the **CaseView** page, right-click on the button, choose **Properties**, and the Macro tab. That will show where the macro begins. Go to that cell (currently **Macs:E4**) and read down until you find a call for the informational message (currently in **Macs:E16**), which currently reads **{alert "New Case Follow-up",+Macs:B105,Macs:B10}**.

To deactivate this informational message, you could either delete this text, or better, deactivate it by putting a semi-colon at the start. In this example, the modified code would be **{; alert "New Case Follow-up",+Macs:B105,Macs:B10}**. The semi-colon tells QP not to enforce this command. You can reactivate the message simply by removing the semi-colon.

To change the message, you can edit the text in the **{alert}** command. Where the text is stored in a different cell, as in the above example, you would go to that cell (in this case, **Macs:B105**) and edit it there.

To make multiline messages, after typing the text on one line, type **Alt+Enter** to drop down to the next line in the same cell.

E. How to change the display of cases on the Zenas front page.

This will explain how to change the display of cases on the **Zenas** main page, and with any luck, it will give some insight into how to change other reports.

By right-clicking the **[List Cases]** button and choosing selection properties, we see that the macro that controls the display of cases is located at Macs:c31. We see that the command at Macs:c32 runs the macro starting at Macs:c38 for every case in the **Cases** database.

- That macro stops when it gets to a blank cell (Macs:c39).
- It doesn't list cases with a **Case#** less than 1000, thus omitting pro bono cases (Macs:c40).
- It places cases closed less than 90 days, it runs the series of commands at Macs:c54..c56 that place data on the case into columns L..N on the **Zenas** front page (Macs:c41).
- Other closed cases are ignored (Macs:c42).
- For other cases, if there is text in the **Status** column of the **Cases** Database (which I use to mark the case as inactive or "as needed" or "standby"), the macro runs the series of commands at Macs:c50..c52 that puts information into columns I..K on the **Zenas** front page (Macs:c43).
- If there is no text in the **Status** column, Zenas regards the case as fully active and runs the commands at Macs:c46..c48 to put information into columns F..H on the Zenas front page (Macs:c44).

Afterward, the macro does other things to format the display, but what was just written gets at the logic of the macro and provides the framework for changing it. For example, assume that all of your open cases are "active" in some sense, but you want to divide the display of cases between cases opened more than one year ago, to be shown in columns F..H, and cases opened in the last year, which will be shown in columns I..K. If that is your goal, all you need to change are the contents of cells Macs:c43 and c44:

- Instead of the offset of 9 in those cells, which tests what is in the **Status** column, you would use an offset of 5, which tests what is in the **D/Open** column.
- The test for whether a case is opened more than one year ago would be whether the content of the cell in the **D/Open** column plus 365 is less than the date returned by the **@today** function. If so, it belongs in columns F..H; otherwise, it belongs in columns I..K.
- Accordingly, you would change the contents of Macs:c43 (for columns I..K) from:

- `{if @index(Cases:a1..o10000,9,Macs:B13)<>""}{Macs:c50}{return}`
 to: `{if @index(Cases:a1..o10000,5,Macs:B13)+365>=@today}{Macs:c50}{return}`
- Likewise, you would change the contents of Macs:c44 (for columns F..H) from:

`{if @index(Cases:a1..o10000,9,Macs:B13)=""}{Macs:c46}{return}`

 to: `{if @index(Cases:a1..o10000,5,Macs:B13)+365<@today}{Macs:c46}{return}`
 - You could adjust the number 365 to achieve greater balance. Or you could use other tests.

F. How to write macros to pull information out of a Zenas database, generally.

The basic tools for pulling data out of a Zenas database are the generic **@Index** function and its more structured cousin, the **@VLookup** function. **@Index** works on any block of data forming a database, but the programmer has to supply the column and row. **@Vlookup** works on the narrower, but highly useful subset of databases in which a unique index number for each row of data is in the first column.

The three parameters of the **@Index** function are (a) the coordinates of the database, (b) the column, and (c) the row. The first two are almost always easy: we determine what type of information we want, look at the database, find the category of information that we want at the top of the database, and then count the number of columns from the leftmost column. So determining the row is usually the only significant issue.

The most common way to determine the row is to use an **@match** function, which has three parameters: (a) the number or text that you want to find in a column of data, (b) the coordinates of the column of data (it can only be one column), and (c) the type of match (Zenas uses zero to require an exact match). One limitation of **@match** is that if there is more than one match in the column, it returns only the first it finds. Therefore, it works reliably only on columns with unique numbers, and therefore again, there is value to assigning unique numbers to each case and person in the database, as in the **Cases** and **People** databases in Zenas.

In generating reports from the database, the row is typically supplied by a variable created by the **{for}** command, as explained below.

The **@Vlookup** function combines both the **@index** and **@match** functions for many uses. It takes four parameters: (a) the number or text that you want to find, which will be used for determining the row, (b) the coordinates of the entire database, (c) the column of information that you want, and the type of match (which should again be zero for the uses that Zenas makes of databases). **@Vlookup** assumes that the number or text that you seek is in the leftmost column, that the leftmost column is sorted, and that it has no blanks. Several of Zenas's databases are structured in that way, so an **@vlookup** function is marginally more efficient in those cases.

G. How to write macros to report information from a Zenas database, generally.

There are several ways to write data to cells in QP. The most common method used in Zenas is the **{Let}** command, which has two parameters: (a) the target location, and (b) the data to write there. **{Let}** is limited in that it cannot write formulas; it can write a formula as a string or evaluate the formula and write what the formula returns, but it cannot write a formula.¹³

Since we cannot know in advance where much of the data should be placed, Zenas uses the **@offset** formula to place the data. **@offset** has three parameters, (a) the address of the top left cell of the report (or of the place on the report where tabular data will be shown), (b) the number of rows below that initial address, and (c) the number of columns to the right of that address. Here again, we will know the starting address of where the tabular data will appear because it is a specific place in the Zenas notebook, and with column headings, we should know how many columns to the right of that cell that we need to place the data. Therefore, again, the row is usually the only significant unknown.

To determine the correct row, Zenas usually uses the **@count** function, in order to count the number of entries that are already in the leftmost column of the report. For example, in the Caseload Progress Report on the Deadlines page, the tabular data starts at P3. **@count(Deadlines:P3..P1000)** returns the number of entries in that range. If there are no entries, it returns a value of 0, which is the offset to use for starting to print data at that point. **{let @offset(Deadlines:P3,@count(Deadlines:P3..P1000),0),“First item of data”}** will thus put the “First item of data” into cell P3 on the Deadlines sheet.

A potential problem arises from using **@count** in that, once you use that macro to put an entry into the first column, the number that **@count** returns increases by one, so you can’t simply copy the **@count** formula to place entries on the same row of the report. Here are two solutions.

(1) If the macro fills every cell in the report, you can use **@count** with each column. The next entry to the right might be **{let @offset(Deadlines:P3,@count(Deadlines:Q3..Q1000),1),“Second item of data”}**. This will not work well if the report might be blank in certain cells.

(2) Better, store the value of the **@count** function in a separate cell, and then use that cell as the source of the row for each item to be put into the report. Hence, the macro may proceed:

{let Macs:B40,@Count(Deadlines:P3..P1000)}

¹³ In rare instances in which a formula must be placed in a cell, such as the Deadlines, Zenas moves to the cell and uses a **{putcell}** command.

```
{let @offset(Deadlines:P3,Macs:B40,0),“First item of data”}
```

```
{let @offset(Deadlines:P3,Macs:B40,1),“Second item of data”}
```

```
{let @offset(Deadlines:P3,Macs:B40,2),“Third item of data”}, and so on.
```

Zenas uses the second approach most often.

H. How to combine these techniques to write a report.

In the prior two sections, we discussed how to pull bits of information out of Zenas database and then how to write a row of information into a report. We now put these together, using the `{for}` command, to search an entire database and write a report on what you find.

The `{for}` command runs a series of macro commands a set number of times (though it can be terminated earlier), and with each repetition being numbered. It has five arguments: (a) the cell where it stores the current number (or “counter”); (b) the starting number; (c) the ending number; (d) the “step” number (which will be 1 in these examples, but could be any other positive or negative integer), and the address of the macro commands to be run on each occasion. The idea will be to go down each row in the database, from the starting row to the ending row, and process a series of macro commands *for* each of those rows.

A typical starting command will be `{for Macs:B13,1,10000,1,Macs:c39}`. Explanation:

- Zenas typically uses `Macs:B13` to store the counter of a `{for}` command.
- The starting row is designated as `1` because the Zenas databases are structured with text headers on the top row, with data starting on the next row. The `@offset` command treats the top row of headers as having an offset of `0`, whereas the first row of data has an offset of `1`. We start processing the macro commands on that first row of data.
- The ending row is `10000`, not because there are 10,000 rows that will need to be processed, but because this is a number that is large enough to cover all instances. (Use a larger number if your entries are close to, or more than, 10,000.) The macro will contain the `{forbreak}` command to stop the repetitions when there is no more data to process.
- The step variable is `1`, meaning that on the first repetition, we will process row 1; on the second, row 2; on the third, row 3, etc. (Note that it is sometimes useful to process backward from the end, and then a `-1` variable is useful, after setting the starting number as the high one and the ending number as the low one. There are also instances in which a number like `2` would be useful, such as to process only even-numbered rows.)
- In this instance `Macs:c39` is the location of the commands to process; any other location could be specified. It should be separated from the commands containing the `{for}` command so that they are not inadvertently processed again.

Turning to the commands to be processed, which will begin at `Macs:c39` in this example, it is common to start with a test for the condition that will end the `{for}` loop command. The commonest case will be when the data run out in the leftmost

column of the database, but other and multiple tests can be coded. Hence, if we are running down the cases database and intend to stop the loop when we reach a blank in the leftmost column, this works:

```
{if @index(Cases:a1..o10000,0,Macs:B13)=""}{forbreak}
```

The next set of one or more commands will typically be to test for conditions that don't stop the **{for}** loop running altogether, but that stop it running for this particular row. In other words, if there is some fact about this row that makes us want to ignore it, we test for that condition and, if it is true, add a **{return}** command, which returns the processing to the command (here a **{for}** command) that initiated it. For instance, if we want to ignore rows where the case number is less than 1000, this command works:

```
{if @index(Cases:a1..o10000,0,Macs:B13)<1000}{return}
```

After setting all the tests for stopping the **{for}** loop or ignoring the current row of the Zenas database, then we write commands for taking data on the current row (using **@index** or **@vlookup** functions), and writing it (or writing the result of manipulating it in some way) into a report with **{let}** commands that use an **@offset** function to determine where the data will be written. The details of doing so were addressed in the last two sections. A typical set of commands might be:

```
{let Macs:B40,@Count(NewReport:A2..A1000)}
```

which sets the row for the report at Macs:B40

```
{let @OFFSET(NewReport:A2,Macs:B40,0),@index(Cases:a1..o10000,0,Macs:B13)}
```

which takes the leftmost item of data (offset of 0) in the **Cases** database on the current row (which is set in **Macs:B13**), and without manipulating it, places it in the leftmost column (offset of 0) in the cell that is below **NewReport:A2** by the number contained in **Macs:B40** (which can be 0). This basic format can be copied into subsequent macro commands and then altered for other columns of the report, simply by (a) altering the column offset of the report, (b) altering the column offset in the **Cases** database, and perhaps (c) manipulating the data extracted from the **Cases** database before writing it.

I. An alternative method for writing reports

The method just given tests every row in a database, one at a time. That method works, but Zenas also uses an alternative, possibly quicker, method in cases involving a small subset of rows that aren't contiguous. Examples are entries for a particular case in the **Time** or **Costs** databases, and entries for a particular person in the **Actor** and **Lawyers** databases. Instead of checking every line, Zenas uses an **@match** function to find each entry, while skipping over non-matching entries in one step. This is complicated by the facts that:

- **@match** finds only the first match in a database. In order to use it repeatedly, Zenas must change the coordinates of the database, so that it searches a second time in rows after the first match. It changes both the coordinates of the column in which the **@match** search takes place, and the coordinates of the database as a whole, so that each start on the row following the last find.
- The variable coordinates cannot be hard-coded into the macro, and the **@offset** function – which is the most usual way to generate coordinates with variables – cannot be used to supply the coordinates as the first argument of an **@index** function (an ERR results).

You can study the details in those macros, but the key trick is to calculate the new coordinates of the column to be searched in the database and entering those into a cell, say Z1, calculating the new coordinates of the database and entering those in cell Z2, and then using an **@@** function to refer to the coordinates. Thus, an **@match** function searching for a number that is stored in Z3, and storing in cell Z4 the offset row on which it is found, takes this form:

```
{let Z4,@match(Z3,@@(Z1),0)}
```

And an **@index** function can then take, say, information from the third column to the right of the left-most column in the re-calculated database and store it in cell Z5, as follows:

```
{let Z5,@index(@@(Z2),3,Z4)}
```

J. Macro programming in Quattro Pro and PerfectScript.

These are not the only ways to read and write data to Zenas databases. I have prepared a “Cheat Sheet” for a variety of ways to automate QP programming. You may download the file at this URL:

http://corklaw.com/Tech/Zenas/QP_CheatSheet.wpd.

K. How to change the structure of the Zenas databases.

It is entirely conceivable that you may want to track more information on, say, cases and people than the fields available in the **Cases** and **People** databases currently allow. You *can* restructure those, or other databases, the macros that relate to them, and the search/report fields that draw information from them. I do not recommend doing so unless you definitely need to do so, since reprogramming macros is likely. I certainly do not recommend changing the order of fields that you use, since many of the macros count on information being in a certain column, and to get the same results, you would have to go through all of the pertinent macros, understand them, and change them.

For instance, the **Cases** database is programmed to refer to the cells at Cases:a1..o10000. If you have more than 10000 clients, you would need to find every reference to the Cases:a1..o10000 and change the latter reference to some higher number, such as o20000. If you need to add three more information fields, you would need to change the latter reference to r10000. You would need to do this at every place you find “Cases:a1..o10000” and change it. This is likely to involve the **Macs** page and several formulas.

If you need to add to Zenas databases, here is what I would do:

1. Add the columns you need to the existing columns, rather than re-shuffling existing columns.
2. Find every reference to the existing database on the **Macs** page, in the PerfectScript macros, and in formulas at various spots in Zenas. Change them to embrace the new columns.