

New Benefits from Seneca CM

Introduction

This 'Benefits from Seneca' newsletter from **emis intellectual technology** covers:

- Documents - headers/footers, warning messages to avoid versioning issues when two users edit the same document simultaneously and auto-saving of Word documents;
- SARS - how we are trying to further improve communication about Software Amendment Requests;
- Outlook – easier day to day synchronisation of your Outlook tasks, contacts and appointments with Seneca;
- Digital dictation – a safety net where dictation could otherwise be lost;
- Contacts – bulk allocation of contacts from role to role;
- Seneca PM – new reports; and
- Web Publishing – improving communication with your clients and other contacts.

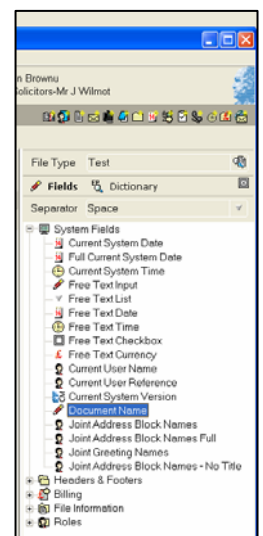
Headers/Footers

Up until now you've not been able to put the name of a Seneca document (changing as it is saved) into Word's headers or footers. That's because Word won't directly allow user defined form fields to be added to headers/footers.

However, by hook (coding) and by crook (Word know-how) you are able to do that now as follows:

- add a (new since version 6.1400) document name field to the body of your document. Note that you can set the font colour as white if you don't want it to appear when printed;
- select View Header/Footer, Insert, Field;
- in the Field Names List select Ref;
- choose the bookmark name of the 'document name field' that has been added to the body text;
- format the font if necessary.

Result: - the field in the header/footer is referenced to the field in the body text and displays its content.



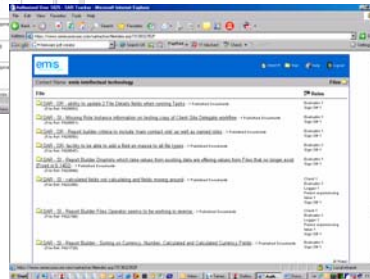
Seneca SARTracker™



To see the status of any Software Amendment Requested you have sent to us simply go to your url (available from your client relationship manager) and enter your login name and password.



The initial display is of relevant SAR files. This can be filtered to show only open files and/or searched by file reference or title.



Clicking on the files icon shows all the files on which documents have been web published.

Those documents can be viewed or saved offline.

Outlook Synchronisation

Seneca now allows you to use 'relative' dates for synchronisation so, for example, Seneca and Outlook will always know what your tasks are for today whenever today may be.

And, of course, that information can be passed on from Outlook to your PDA (via ActiveSync) or Blackberry (via IntelliSync).

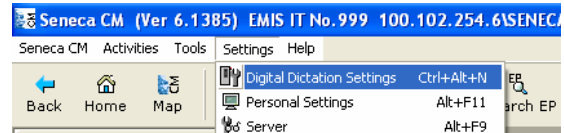
Contacts

Staff left or moved from department to department?

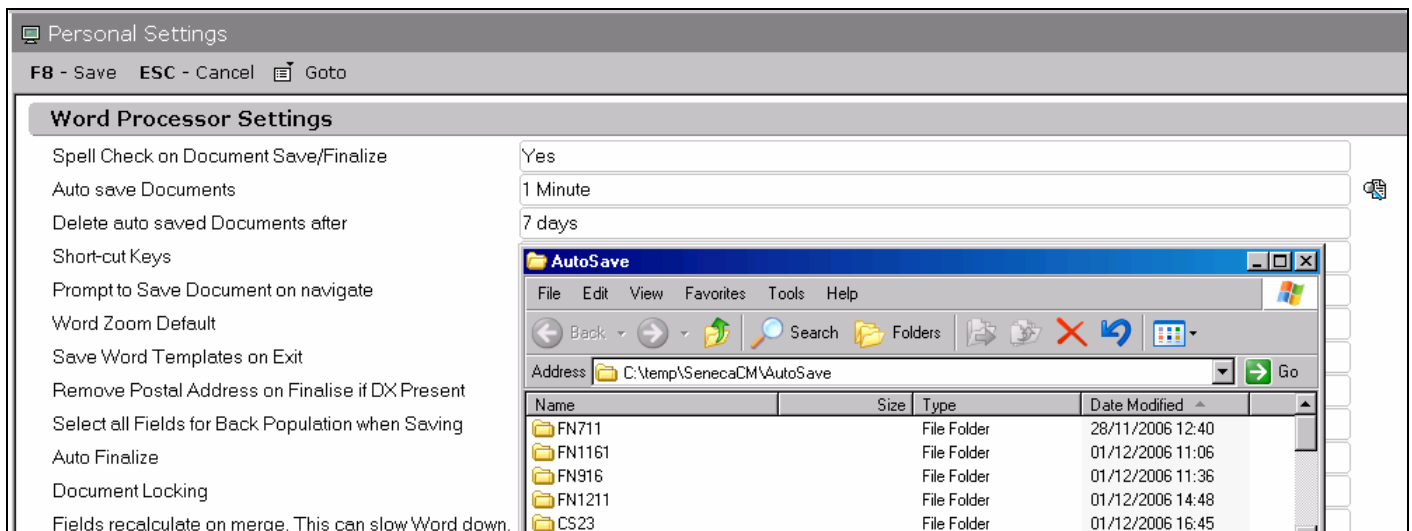
A new feature has been introduced to allow a user to swap some or all of the roles performed by one contact to another contact. To use this new feature please follow the instructions in the release notes to version 6.1385.

Digital Dictation

A new option has been introduced for the Digital Dictation integration to allow for the 'Auto-Saving' of dictations. With this option selected, if the user has an active file and whilst recording a dictation there is a 'crash' on the PC, a copy of the dictation will be saved. To use this new feature, simply turn it on via Settings, Digital Dictation Settings.



And while mentioning Auto-Saving – don't forget that Seneca Word Documents can be easily Auto-Saved (enabled via Setting, Personal Settings, Word Processor Settings. Edit) and retrieved (Setting, Personal Settings, Word Processor Settings, Edit and then click on the search icon to the right):



Document Management

To complement Seneca's existing document management tools (including full text searching, categories, comparison and versioning) we've now added a facility to give a warning message if one user opens a document that is already in use by another user.

Seneca PM

Cashflow Forecast (detailed) for Jan 2006 (Run on 21/11/2006 15:48)

Department/Group	Monthly Budget	Jan Actual	Feb Actual	Mar Actual	Apr Actual	May Actual	Jun Actual	Jul Actual	Aug Actual	Sep Actual	Oct Actual	Nov Actual	Dec Actual	Total Actual
	£	£	£	£	£	£	£	£	£	£	£	£	£	£
INCOME														
NL2811.2	166.67	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
FH11 Commercial Supplies	20000.00	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	20000.00	100.00%	20000.00
Sub-Total	242000.00	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	20000.00
EXPENSE														
NL2811.2	0.00	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
FH99.9	83.33	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
FH99.9 my group	83.33	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
FH14	1416.67	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
FH22	333.33	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
FH1028	-3333.33	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
FH28	416.67	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
NL2811.6	416.67	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
FH4 Supplies	38.33	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
FH1045 Commercial my group	0.00	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
Sub-Total	2700.00	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00
NET	34700.00	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	20000.00	0.00%	20000.00

We've added lots of new and/or improved reports to Seneca PM including a cash flow report showing individual monthly variances.

Web Publishing

Documents from Files in Seneca CM can be published to the web. Main contacts on a File can then view 'real time' updates of their Files. You need to provide them with a unique logon identifier (their Seneca Contact Number) and a password. Once the client has been given these they can click the emis link on your website, and then type their details on the Logon screen. A list of the available documents is displayed; clicking a document displays it.

You can publish a document to the web in two ways:

- Your workflow administrator can set it as a property of the document; as soon as the document is saved as a final version it is automatically published to the web.
- You can publish documents directly via right click from the file contents screen.

If you are interested in this service and want an estimate of the costs involved to set up an account, please contact us.

Conclusion

We hope you've found this edition of Seneca Benefits useful and if you have any questions please contact the implementation team.