

New Benefits from Seneca CM

Introduction

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

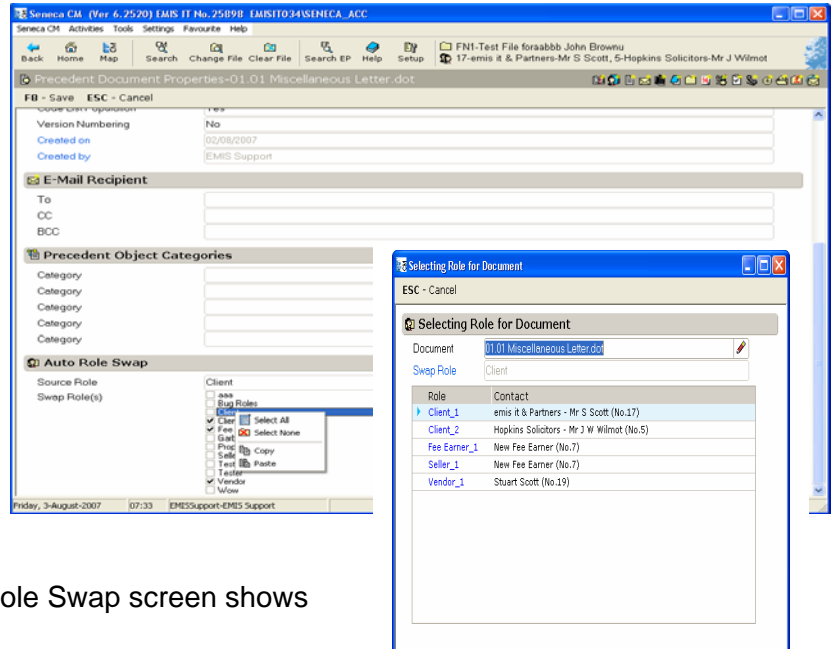
- Auto Role Swap – between Source Roles and Selected Roles in Precedent documents;
- Auto-Saved Laserforms – now stored in the same folder as auto-saved MS Word® documents;
- Bill Postings – updated to allow multiple costs allocation for up to twelve fee earners;
- Contacts – how to filter your files to match those for an organisation or partnership to which an active contact belongs;
- Costs Billed – Report Builder reports on the total value for each selected file;
- Digital Dictation:
 - easily navigate to the start and end of your dictations;
 - a new message prompts you to save or abandon unsaved dictations;
 - the improved purge facility only removes old dictations which have been transcribed;
- Disbursements – a new option for separate display of billed net and VAT amounts;
- Emails – send MS Outlook® emails directly to Seneca via a right click;
- File Contents:
 - select multiple tasks to complete or delete;
 - a new icon alerts you to a change of file when saving an email or Windows object with a Seneca file reference;
 - emails sent and/or attached to Seneca are now assigned the current date by default;
- Logging On – using your MS Windows® logon;
- Time Recording – updated to calculate values for non-chargeable time;
- WIP
 - move unbilled time postings to another file; and
 - a new fixed Aged WIP report details unbilled time by age bands and can be grouped by file, fee earner or department.

Auto Role Swaps

The Precedent Document Properties screen now provides an Auto Role Swap from the Source Role to Selected Roles of your choice.

Right clicking on the Swap Role(s) list allows you to:

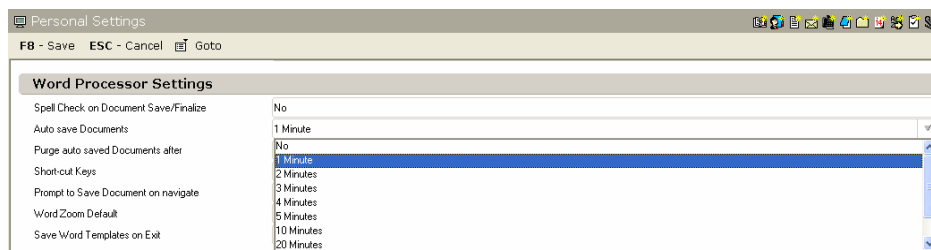
- Select All Swap Roles
- Select None of the Roles listed
- Copy the selection to the Windows clipboard
- Paste the selection from the Windows clipboard



On launching the Precedent document, the Role Swap screen shows the selected Roles:

Auto-Saved Laserforms

These are now stored in the same folder as auto-saved Microsoft Word® documents.

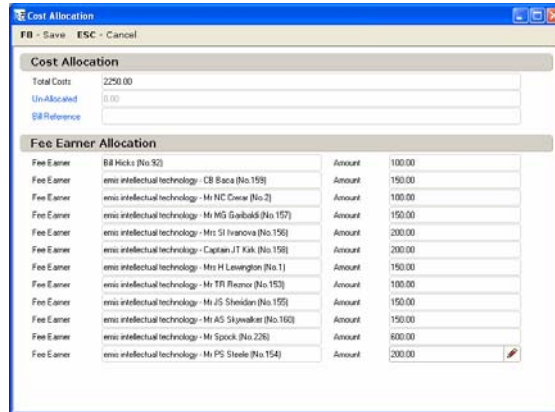


You can set the autosave period by selecting the E-Edit option in the Personal Settings screen, going to the Word Processor Settings section and choosing the required period from the drop list in the Autosave Documents field.

Cost Allocations for Multiple Fee Earners

Fee earners can choose to edit their cost allocations directly on the Transaction Details screen or using the updated Cost Allocation dialogue:

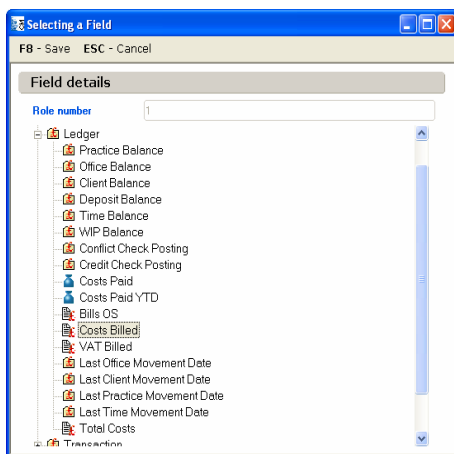
This allows allocates to be entered for up to twelve fee earners.



Files List Filter for Active Contacts

In addition to filtering the Files List screen to display all files for a specific active contact you can now display all the files for the organisation or partnership to which an active contact belongs. For details on setting up this feature please see the release notes to Version 6.1489.

Costs Billed Reports



The Report Output section of the Report Builder contains a new criteria option for Costs Billed in the Ledger section.

It displays details of the total costs billed value for each selected file:

TestReport.csv

File Reference	File Title	Costs Billed
PM89	PM Testing A - Badco Ltd-Mr V Shifty	370.00
PM90	PM Testing A - John Brown	0.00
PM91	PM Testing A - Peter Opie	0.00
PM92	PM Testing A - John Jones	0.00
PM93	PM Testing A - John Totty	300.00
PM94	PM Testing A - Gordon Smith	0.00
PM95	PM Testing A - Sarah Hargrove	150.00

Navigating Digital Dictations

Two new shortcuts have been designed to help you neatly navigate to the start and end of your Digital Dictations.

When recording or playing a Digital Dictation use:

- CTL+ALT+S to get to the start; and
- CTL+ALT+E to get to the end.

Unsaved Digital Dictations

These need never be lost again thanks to the new confirmation screen message which prompts you to save or abandon the dictation.

Purging Old Digital Dictations

This feature has been improved for your peace of mind to ensure that only those dictations which have been transcribed are removed. Old draft or untranscribed dictations are no longer affected.

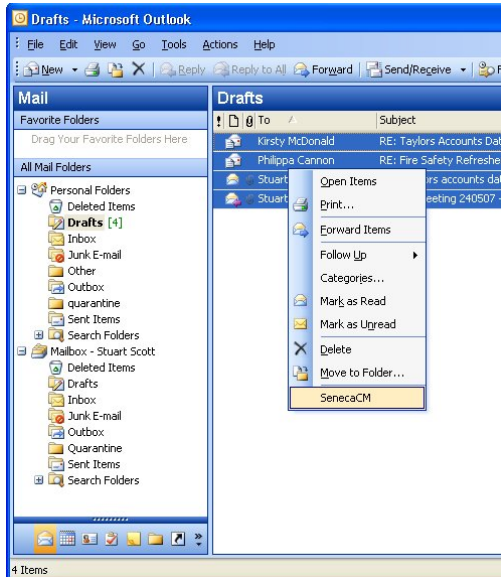
Billed Disbursement Display

The Precedents/WP screen allows you to change the format in which the Ledger information on billed disbursement items is displayed.

By merging the SYSTEM_DISBURSEMENT_ITEMS_VATABLE and SYSTEM_DISBURSEMENT_ITEMS_NOT_VATABLE fields, the net and VAT amounts will appear in separate columns:

Test Precedent for SAR FN23125		
VATable Disbursements		
Details	Amount	VAT
emis intellectual technology-Test VATable Disbursement 003 notes	300.00	52.50
emis intellectual technology-Test VATable Disbursement 002 notes	200.00	35.00
emis intellectual technology-Test VATable Disbursement 001	100.00	17.50
Non-VATable Disbursements		
Details	Amount	VAT
emis intellectual technology-Test NON VATable Disbursement 003 notes 005	75.00	
emis intellectual technology-Test NON VATable Disbursement 005	50.00	

Emails: Sending to Seneca



The Microsoft Outlook® interface now gives you the option of sending emails directly to Seneca.

Just select the emails you wish to send in the Drafts folder and right click.

Multiple Task Management

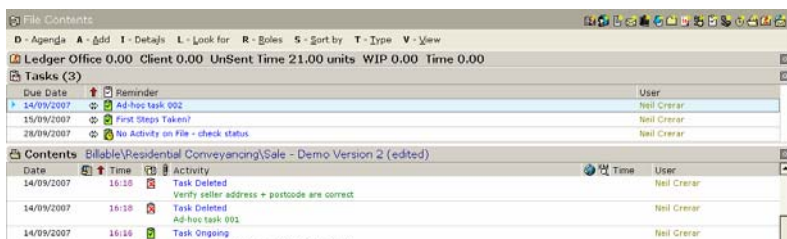
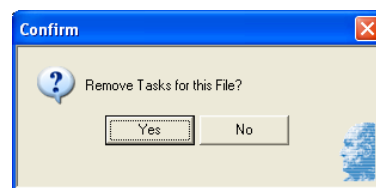


In the File Contents screen users can now select multiple tasks to complete or delete.

In the Tasks section simply use the SHIFT key to select a range of tasks or CTRL to pick a specific task.

Deleting tasks?

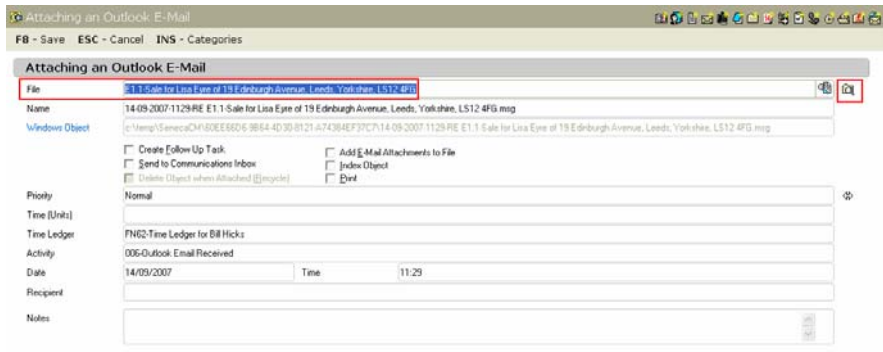
A screen message acts as a safeguard prompting you to confirm the action.



Multiple task action (whether to complete or delete) is then recorded in the Contents section of the screen.

File Swapping

When saving an email or attaching a Microsoft Windows® object which contains a Seneca file reference, Seneca automatically swaps from the active file to the Seneca file enabling you to move effortlessly between files in the File Contents screen. This facility has now been improved to alert you to the change of file.

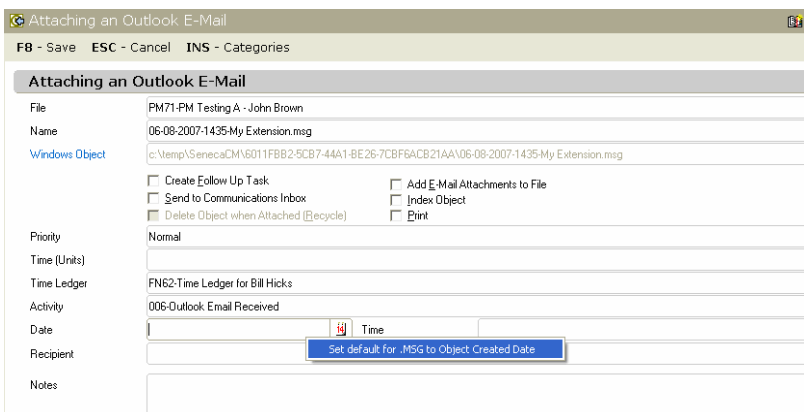


A folder icon displays in the file title field of the Save screen...

...which when clicked will revert to the Save screen for the original active file:



Email Date Default



The Attach Email screen in File Contents has been changed. By default this now assigns the *current* date to the email on the File Contents screen when you:

- “Attach an Email Item”; or
- use the Seneca macro button on a new email to send and attach it to Seneca.

To use the email *creation* date right click on the Date field on the Attaching an Email screen and select from the pop-up menu.

Seneca Access Simplified

Logging on to Seneca has been made even easier. Choose between either:

- the standard log on process (by entering your unique Seneca login ID and Password); or
- logging on automatically using your usual Microsoft Windows® login.

See the release notes to version 6.1494 for full details and information on a number of other developments.

Work Smarter with Seneca

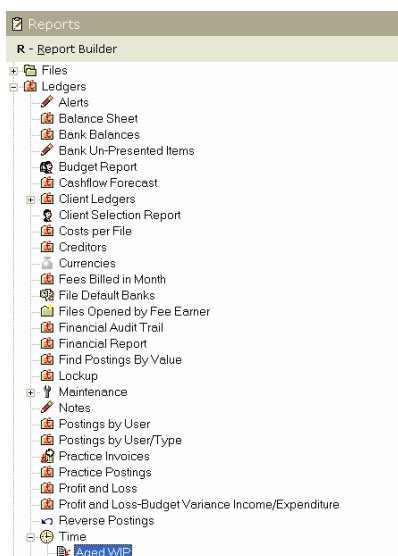
Seneca's updated time recording facility automatically calculates the value of your Non-Chargeable Activities without increasing the WIP value as the client is not charged for this time. Check how much the activity would have been worth had it been chargeable time.

For further details on setting up this feature please refer to the release notes to version 6.1494.

Moving WIP to Another File

The File Ledger screen hosts a new option for transferring unbilled time postings to another file. Simply highlight the unbilled time entry you wish to transfer, right click to display the pop-up menu and select "Move WIP to Other File". See the release notes to version 6-2590 for full details on enabling this facility.

New Aged WIP Report



A fixed ledger report has been created in Report Builder for Aged WIP which displays a breakdown of unbilled WIP by the following age bands:

- current;
- 31-60 days;
- 61-90 days;
- > 90 days.

Users can select from a range of output formats:

- Detailed;

Aged WIP for 23/08/2007

File No.	File Title	Main Contact	Dept.	Fee Earner	Current	31-60 days	61-90 days	>90 days	Total	Bill Ref.	Bill Date
38.3	PM Testing B - Albana Cornhall	Albana Cornhall	01	BH	100.00	0.00	0.00	0.00	100.00		29/07/2007
38.3	PM Testing B - Albana Cornhall	Albana Cornhall	01	BH	0.00	90.00	0.00	0.00	90.00		31/07/2007
8.2	PM Tune and WIP Testing - John Brown	John Brown	01	BH	70.00	0.00	0.00	0.00	70.00		15/08/2007
26.1	01 01 - Stage 1 - Simple Data -	Violet Halero	04	HH	70.00	0.00	0.00	0.00	70.00		21/08/2007
8.6	Trade Mark Application on behalf of by	John Brown	04	HH	30.00	0.00	0.00	0.00	30.00		23/08/2007
27.3	PM Testing B - Badco Ltd-Mr V Shafy	Badco Ltd-Mr V Shafy	03	NC	0.00	0.00	0.00	200.00	200.00		01/03/2007
27.3	PM Testing B - Badco Ltd-Mr V Shafy	Badco Ltd-Mr V Shafy	03	NC	0.00	0.00	0.00	200.00	200.00		25/04/2007
27.3	PM Testing B - Badco Ltd-Mr V Shafy	Badco Ltd-Mr V Shafy	03	NC	0.00	0.00	0.00	200.00	200.00		23/05/2007
27.3	PM Testing B - Badco Ltd-Mr V Shafy	Badco Ltd-Mr V Shafy	03	NC	100.00	0.00	0.00	0.00	100.00		23/08/2007
27.3	PM Testing B - Badco Ltd-Mr V Shafy	Badco Ltd-Mr V Shafy	03	NC	0.00	0.00	0.00	100.00	100.00		15/05/2007
27.3	PM Testing B - Badco Ltd-Mr V Shafy	Badco Ltd-Mr V Shafy	03	NC	0.00	0.00	0.00	50.00	50.00		20/05/2007
27.3	PM Testing B - Badco Ltd-Mr V Shafy	Badco Ltd-Mr V Shafy	03	NC	0.00	0.00	0.00	50.00	50.00		18/05/2007
27.3	PM Testing B - Badco Ltd-Mr V Shafy	Badco Ltd-Mr V Shafy	03	NC	0.00	0.00	0.00	50.00	50.00		17/06/2007

- Detailed Grouped by File;

Aged WIP for 23/08/2007

File No.	File Title	Main Contact	Dept.	Fee Earner	Current	31-60 days	61-90 days	>90 days	Total
26.1	01 01 - Stage 1 - Simple Data -	Violet Halero	04	HH	70.00	0.00	0.00	0.00	70.00
27.3	PM Testing B - Badco Ltd-Mr V Shafy	Badco Ltd-Mr V Shafy	03	NC	160.00	180.00	50.00	800.00	1190.00
38.3	PM Testing B - Albana Cornhall	Albana Cornhall	01	BH	100.00	90.00	0.00	0.00	190.00
39.1	PM Testing B - The Smithson Group-Miss E A	The Smithson Group-Miss E A	04	SI	0.00	190.00	0.00	0.00	190.00
8.6	Trade Mark Application on behalf of by	John Brown	04	HH	30.00	0.00	0.00	0.00	30.00
8.2	PM Tune and WIP Testing - John Brown	John Brown	01	BH	70.00	0.00	0.00	0.00	70.00
FM50	PM Testing A - Edward Bume Jones	Edward Bume Jones	03	NC	6295.00	0.00	0.00	0.00	6295.00
FM56	PM Testing A - Joe Bloggs-Mr J Bloggs	Joe Bloggs-Mr J Bloggs	03	NC	1040.00	0.00	0.00	0.00	1040.00
Total					7765.00	460.00	50.00	800.00	9075.00

- Detailed Grouped by Fee Earner;

Aged WIP for 23/08/2007

File No.	File Title	Main Contact	Dept.	Fee Earner	Current	31-60 days	61-90 days	>90 days	Total
38.3	PM Testing B - Albana Cornhall	Albana Cornhall	01	BH	100.00	90.00	0.00	0.00	190.00
8.2	PM Tune and WIP Testing - John Brown	John Brown	01	BH	70.00	0.00	0.00	0.00	70.00
Sub-Total 2 Entries					170.00	90.00	0.00	0.00	260.00
26.1	01 01 - Stage 1 - Simple Data -	Violet Halero	04	HH	70.00	0.00	0.00	0.00	70.00
8.6	Trade Mark Application on behalf of by	John Brown	04	HH	30.00	0.00	0.00	0.00	30.00
Sub-Total 2 Entries					100.00	0.00	0.00	0.00	100.00
27.3	PM Testing B - Badco Ltd-Mr V Shafy	Badco Ltd-Mr V Shafy	03	NC	160.00	180.00	50.00	800.00	1190.00
FM50	PM Testing A - Edward Bume Jones	Edward Bume Jones	03	NC	6295.00	0.00	0.00	0.00	6295.00
FM56	PM Testing A - Joe Bloggs-Mr J Bloggs	Joe Bloggs-Mr J Bloggs	03	NC	1040.00	0.00	0.00	0.00	1040.00
Sub-Total 3 Entries					7495.00	180.00	50.00	800.00	8525.00
39.1	PM Testing B - The Smithson Group-Miss E A	The Smithson Group-Miss E A	04	SI	0.00	190.00	0.00	0.00	190.00
Sub-Total 1 Entry					0.00	190.00	0.00	0.00	190.00
Total					7765.00	460.00	50.00	800.00	9075.00

- Fee Earner Summary;

Aged WIP for 23/08/2007

Dept.	Fee Earner	Current	31-60 days	61-90 days	>90 days	Total
01	BH	170.00	90.00	0.00	0.00	260.00
03	NC	7495.00	180.00	50.00	800.00	8525.00
04	HH	100.00	0.00	0.00	0.00	100.00
04	SI	0.00	190.00	0.00	0.00	190.00
Total		7765.00	460.00	50.00	800.00	9075.00

- Departmental Summary.

Aged WIP for 23/08/2007

File No.	Main Contact	Dept.	Fee Earner	Current	31-60 days	61-90 days	>90 days	Total
38.3	Albana Cornhall	01	BH	100.00	90.00	0.00	0.00	190.00
8.2	John Brown	01	BH	70.00	0.00	0.00	0.00	70.00
Sub-Total 2 Entries				170.00	90.00	0.00	0.00	260.00
26.1	Violet Halero	04	HH	70.00	0.00	0.00	0.00	70.00
8.6	John Brown	04	HH	30.00	0.00	0.00	0.00	30.00
Sub-Total 2 Entries				100.00	0.00	0.00	0.00	100.00
27.3	Badco Ltd-Mr V Shafy	03	NC	160.00	180.00	50.00	800.00	1190.00
FM50	Edward Bume Jones	03	NC	6295.00	0.00	0.00	0.00	6295.00
FM56	Joe Bloggs-Mr J Bloggs	03	NC	1040.00	0.00	0.00	0.00	1040.00
Sub-Total 3 Entries				7495.00	180.00	50.00	800.00	8525.00
39.1	The Smithson Group-Miss E A	04	SI	0.00	190.00	0.00	0.00	190.00
Sub-Total 1 Entry				0.00	190.00	0.00	0.00	190.00
Total				7765.00	460.00	50.00	800.00	9075.00

Conclusion

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