

New Benefits from Seneca CM

Introduction

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

- Acrobat – how to add a PDF to your Agenda;
- Excel – exporting to Excel templates;
- Contacts – faster and easier searching;
- Reference numbers – year (and other data) related reference numbers made easy and automatic;
- Emails – sending emails automatically to the Contacts with Roles on Files;
- Automatic Versioning – by setting a property your precedent agreement will automatically add versioning information via Seneca;
- Legal Aid – new reports for legal aid practitioners; and
- Auto-Reports – Report Builder reports that just run when you click them or just open for editing – the choice is now yours.

Adobe PDFs and Agendas

You can now upload Adobe PDFs into Seneca Agendas and, after using them in the normal way, save them as Draft/Final Agenda items in the File Contents. See the release notes to version 6.1450 (via Help, Support Application Versions) for full details and for information on a number of other developments.

Export to XLT

Just as a Microsoft Word® document (.DOC) can be saved as a template (.DOT) to allow pre-set formatting and content so too can Microsoft Excel® sheets (.XLS) be saved as templates (.XLT).

So now most Seneca reports (fixed or from the Report Builder) can be exported, via View, Export to XLT, to an Excel template allowing (for example):

- Formatting of cells;
- Inclusion of other data;
- Application of calculations to give additional management information.

Improved Contact Searching

Seneca Contact searching has been made even better. It now allows you to search for a combination of Name, Address, Email, Phone Number and other common fields at the same time.

For example, against the Post Code and E-mail Address fields:

Search Details		
Search CM	ls19 hot	<input type="radio"/> Files <input checked="" type="radio"/> Contacts <input type="radio"/> Objects <input checked="" type="checkbox"/> Individuals <input checked="" type="checkbox"/> Organisations <input type="radio"/> Precedents <input type="radio"/> Postings <input type="checkbox"/> Resources only <input type="checkbox"/> System us
Contact No	Details	
18	Contact Name	Claude Barrington-Smythe
B2	Correspondence	Mr C Barrington-Smythe (claude.barringtons@hotmail.com)
	Address	1 Rombalds Place, Leeds, West Yorkshire, LS19 6BA., UK
	Tel. No.	0113235514
	Type	Clients\Individual

Smart(er) File Reference Numbers

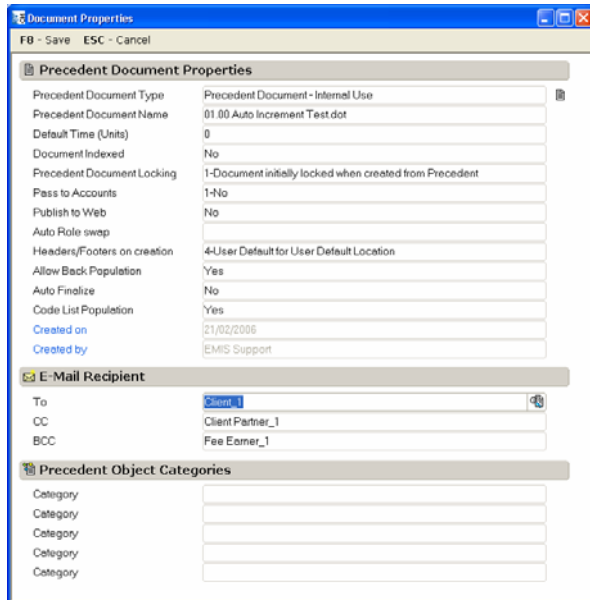
Some firms use a File Reference Numbering convention of 06- for 2006 files, 07- for 2007 files and so on.

Historically, the only way of changing this was to manually edit the File Reference Number for each File Type at the beginning of each year

So, we have now created a system field that looks at the last 2 digits of the year and can be placed in the File Reference field so the pre-fix changes automatically.

And this applies to any of the fields shown on the File Type Properties page.

Intelligent Emails

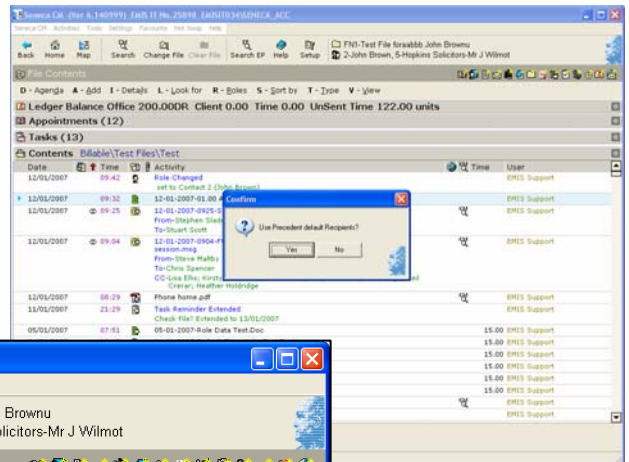


When sending a precedent e-mail have you ever wished that Seneca could save you the trouble of typing or selecting the recipients name and email address?

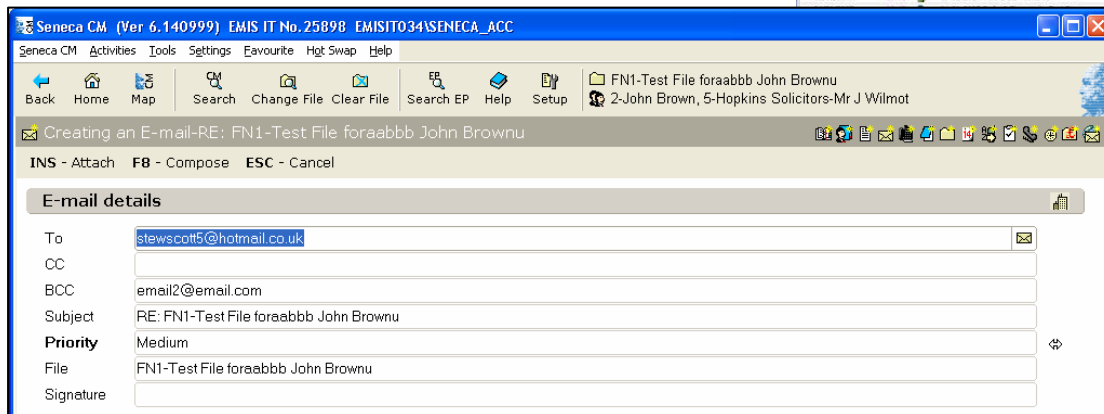
Well your wish has come true.

Within Precedent Properties, the E-Mail Recipient section now allows entry of Roles for To, CC & BCC email recipients

And, when e-mailing from Outlook® using the Precedent, Seneca will prompt you to use the defaults:



If "Yes" is selected, an Outlook e-mail is created with the appropriate To, CC and BCC fields completed:



Automatic Versioning

A new feature has been introduced to Seneca to allow Precedent Documents to be configured to automatically use Seneca's document versioning functionality and generate a version number for Precedents when they are saved. For full details on enabling this facility please refer to the release notes to version 6.1459.

Seneca and Legal Aid

To assist legal aid practitioners a number of fixed ledger reports can now be filtered to only report on files assigned as being for legal aid. The relevant reports are:

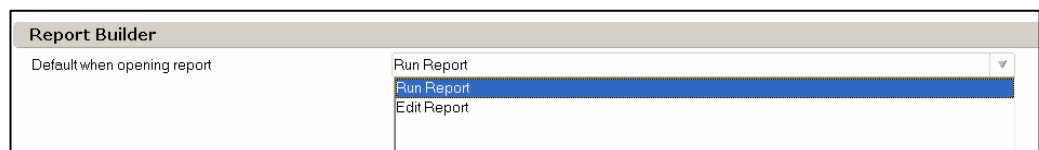
- Aged Debtors
- Anticipated Payments
- Bills Delivered
- Bill Recovery Rates
- Client Selection Report
- Costs Paid
- No Time Postings
- Unbilled Disbursements
- Unbilled Time
- WIP
- WIP Against Budget

For further details on setting up this feature please see the release notes to version 6.1459

Report Builder “Auto-Reports”

Within Personal settings, users can now set if they want to automatically Run or Edit Report builder

Reports when they double click (or when they select a report from favourites)



Conclusion

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