

On-Line Time Recording

Sovereign LAW

On-line Time Recording notes for Fee-earners

Summary

On-Line Time Recording enables fee-earners to record time as they work on files during the day, with the option of recording elapsed time on activities in 'real-time'. Up to 10 time records for each of 14 files can be stored at any one time (with the option of additional 1 line of text entry with each time record).

At the end of the day, or if more time needs to be recorded, the time records are loaded directly into a time sheet and processed for posting. This clears the stored records and another set can then be recorded.

1. Getting Started

Select the 'Sovereign LAW' icon (double-click on left mouse button).

At the 'Welcome to Sage Line 100 for Windows' login screen, enter your initials (and password if required) to access the Sovereign LAW system.

NOTE: You should never need to do this again during the day unless you actually log out of Sovereign LAW properly. If your computer re-displays the 'desktop' screen at any time during the day, always check to see if Sovereign LAW is still running (ie. to return to Sovereign LAW, click on the icon along the bottom or side strip of the screen). You do not need to select the main Sovereign LAW desktop icon again.

Select the 'Time Recording - On Line' option from your menu.

2. Recording Time

Select the 'Record Time' option from the screen menu

NOTE: The user initials entered at the Sage Line 100 log-on screen must correspond to the fee-earner's initials as set up in the Sovereign LAW module parameters. An error message is displayed if this is not the case. When a new set of time records is started the date is automatically set to today's date. The 'New Date' option can be used to record time for a previous date.

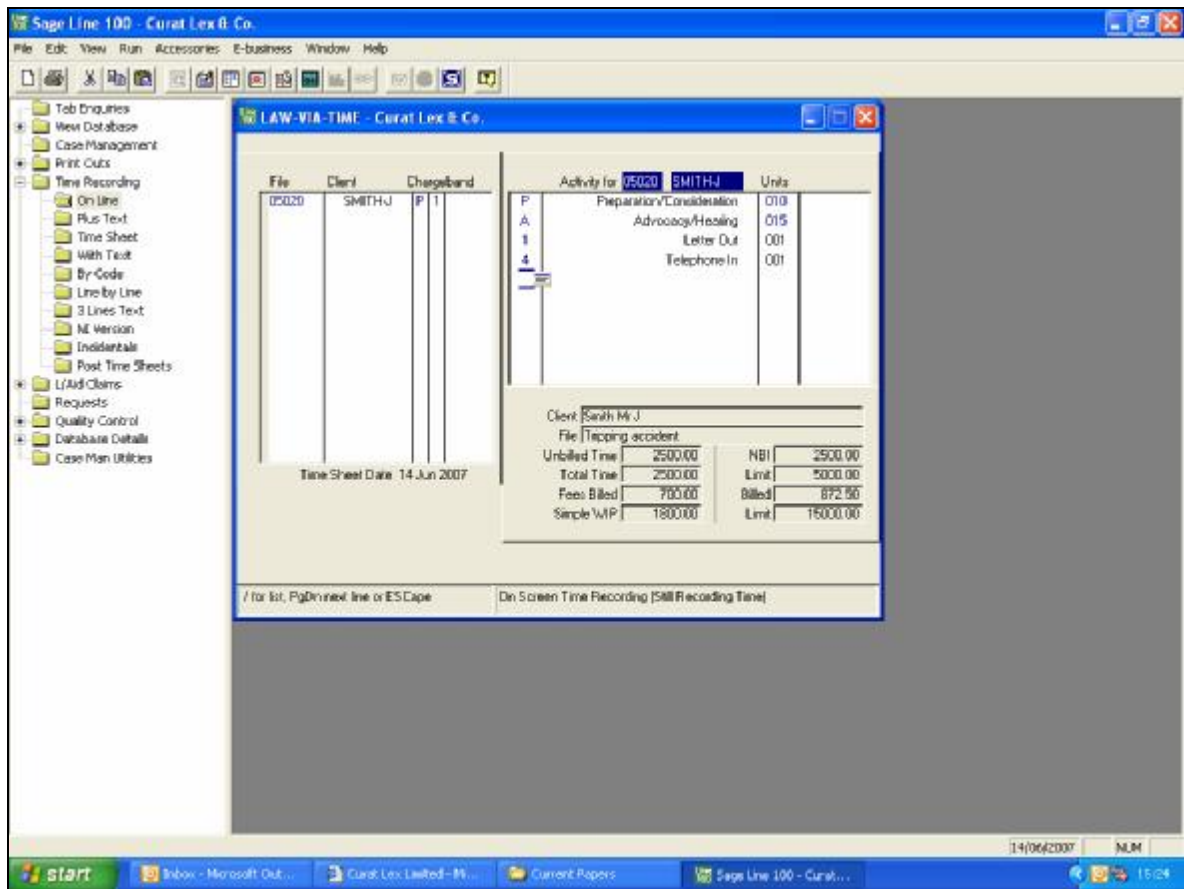
2.1 To record time against a file which is not already in the list, move the pointer to a blank line in the LH box and press Return (or double-click)

**In the File box, type either a valid File No. (or / to search for file by short name)
or a valid non-chargeable code (or // to search codes)**

and then press Return (or Tab) again.

The Short Name, file Category (ie. P-Private, L-Legal Aid, B-Business) and Charge Band is displayed.

Press Return (or Tab) on both Category and Charge Band to confirm default entries (or amend if necessary).



2.2 You are then taken to an empty line in the RH box.

Type in the Activity Code (or / to select from pop-up list). A description of the code is then displayed and the Units box becomes active.

At the Units box, enter the number of units spent on the activity and press return

If a Standard Item activity is entered, then 1 unit is automatically recorded. Entering the number of units then takes you to the next line in the RH box.

[Alternatively, press enter on blank units box to start 'real-time' recording. Time so far is displayed on-screen. Follow the on-screen prompts (eg. press Escape and select 'Stop & Enter Units')].

Repeat the above procedure (2.2) to enter another time record for this file, or simply press Escape (or right-click on the RH screen) to go back to the LH box.

To enter time on another file, repeat procedure (from 2.1)

NOTE: It is acceptable to leave this screen on your computer all day whilst you are working on files. Alternatively, 'minimize' the screen (by clicking on the '-' in the top-right corner if the screen) to return to other Sovereign LAW programs or other Windows applications (eg. Word etc). However, always check the task bar along the bottom of your screen and click on this to return to On-Line Time Recording. Do not reselect the 'Time Recording -On-Line' option or the Sovereign LAW desktop icon if you already have either of them running along the bottom of the screen.

2.3 Completing the Time Recording session (eg. at end of day)

To end time recording for the session, press Escape whilst in the LH box. The following options are then displayed:

Load Time Sheet

This option must be selected at end of session to download time records
-see note 3 (overleaf)

Record Time

This allows more time records to be entered (see note 2.1)

Units Recorded

This option simply displays the total number of chargeable and non-chargeable units recorded so far.

Maintenance

This menu provides options to either change the date of the current on line time session or delete the entire current on line time session.

X-Exit

Selecting X-Exit option will exit from the On-Line time recording program.

NOTE: Even if you select the 'X-Exit' option at this stage, your current on-line time recording sheet for the day will still remain 'live' in the Sovereign LAW system. This means you can go back in (see note 2) and record more time if required. Your existing time records for the day will still be there.

3. Load Time Sheet - **IMPORTANT**

At the end of each day, the 'Load Time Sheet' option MUST be selected. It loads the time records, from your daily on-line time sheet, into the main Time Sheet Entry program and displays them on the screen. The following menu options are then displayed:

Accept Time Sheet

If you are satisfied with the time that you have recorded for the day, select this 'Accept' option. This then processes the data and puts the time records into the Posting File for batch posting later along with all other time records from other fee-earners. You are then returned to the On-Line Time Recording menu (see note 2.) ready to start another on-line time sheet (eg. for tomorrow). Exit from this menu and out of the Sovereign LAW system.

Re-enter Details

This option allows you to go into the time sheet and add, amend or delete records which you are not satisfied with.

X-Exit (Return to On Line time recording)

This option exits the time sheet program and returns to the on-line time recording screen without deleting the time records in your current on-line time sheet.

4. Time Sheet Posting - **IMPORTANT**

Once a day (eg. first thing in morning), it is necessary for the System Administrator to update all of the client ledgers by 'posting' the current batch of time records (eg. all of the f/e time sheets from yesterday).

Select the options: -Time Recording -Post Time Sheets
 -Post Time Sheets
 -Yes

This procedure will take about 1 minute depending on how many time records are stored in the posting file.

5. Viewing Time Records

To view the time records on a file, select either the 'Tab Enquiries' or 'View Database –Enquiries on Files' options.

Select 'Enter File Number' and type in the required file number and press return.

Select either the 'Financial Data' or 'Time Records' or 'Work in Progress' options.

Note that time records appear on the file as 'unbilled' (ie. work in progress). Time records are then only flagged as 'billed' after a Final or Interim bill has been posted on the ledger where the 'from' and 'to' dates on the bill cover the period of the time records.

(Curat Lex can provide more training on time recording and billing if required).

If you encounter any problems or have any queries about On-line Time Recording, please contact the Curat Lex Help Desk (01332 298881).