



Omnia Software - Frequently Asked Questions

- **We have our own time recording system but still want to use Omnia for the budgeting process is that possible?**

Yes, we can set you up with an automatic import routine from your time recording system into Omnia. It will only ever be necessary for fee earners to enter their time recording information once (in your own system).

- **Our practise/case management system already allows us to record work by phase and monitor costs so what else does using Omnia give us?**

Omnia allows differing alerts to be set by case, by phase and by phase elements (profit costs, counsel's fees and disbursements) which makes it far more flexible than most PMS/CMS budgeting systems and means it can be targeted to the needs of particular cases. Omnia can also produce Statements of Costs for summary assessment (Form N260) and from March 2014 will also produce the 3 and 6 column bills of costs.

- **Can I amend my budget alerts?**

Budget alerts can be set and reset as many times as you want. They are set as percentages so you may wish to start with alerts at say 50% at the beginning of the matter and then increase these percentages as the matter progresses.

- **How will I know I have gone over a budget alert?**

The minute you log into Omnia the first thing you will see is a dashboard that shows all matters that have alerts arising from them and what those alerts are. You can then click straight into that matter to investigate further. In addition, you can also arrange to receive alert notifications by e-mail.

- **Is there anyway I can be reminded when to file my Precedent H at court?**

Yes, Omnia allows you to create calendar alerts for the filing of Precedent H and the date of the next hearing – you can also customise your own diary alerts. As for the budget alerts, you will see these as soon as you log on and you can also receive e-mail notifications.

- **What happens if my Precedent H needs to be updated?**

Omnia allows you to create any number of versions of your budget. In creating new budgets it also allows you to copy over previous budgets which you can then amend. You can then monitor against whichever budget you choose as your current one.

- **Can we add extra contingency phases to the Precedent H?**

Yes, Omnia allows you to add as many contingency phases as you wish in addition to the 10 phases required by the Civil Procedure Rules.

- **How do I put the assumptions in?**

Template assumptions can be created for different types of matter which can then automatically import into a similar newly created matter. These assumptions can then be added to or amended within the individual matter.

- **Precedent H does not seem to have enough room for my assumptions?**

Omnia has added supplementary pages to the Precedent H to allow more room for assumptions.

- **What happens if I have created a forecast entry and then realise it is wrong?**

That is no problem as Omnia allows you to amend any entries you have made.

- **I have realised I have put a whole lot of forecast entries in the wrong phase - is there anything I can do about this?**

Yes, Omnia allows you to do a filter on many factors, phase being one of them, and then enables you to carry out a group edit on the filtered result. All the incorrect entries can therefore be amended in one go.

- **Is there any way I can produce template budgets using average actual figures from past cases?**

Yes, when a matter is created you assign each case different types and factors. When a matter is then completed the actual figures can then be filtered by these types and factors and average figures obtained. These figures can then be automatically used to populate a new template budget.

- **I supervise a number of fee earners - can I have access to their budgets?**

Yes, the system enables you to put in place a number of permission levels. For example, fee earners can just see the files they are working on while their Supervisors can see all the matters they are overseeing. There is also an Administrator level which gives access to all matters across the firm.

- **Is there any way I can see at a glance what work I have done today/this week/this month?**

Yes, if you click on the FE Time tab that will allow you to put in any date range by which you can search your recorded time.

- **Is there any way I can see at a glance how much work I have done on a particular matter?**

Yes, if you click on the FE Time tab that will also allow you to search by matter and bring up all work done on that matter in any date range.

- **Can Omnia produce any other types of formal bills and reports?**

Yes, Omnia can produce the N260 Statement of Costs for Summary Assessment. From March 2014 you will also be able to produce 3 and 6 column bills of costs – all from the same set of data/work.