End User Training FAQs

Case Diary

1. How do I complete an action that is not in my name?
2. How do I delete an action?
3. How to I delete a completed action?
4. How do I amend the date of an action?
5. How do I put a note on a Case I am working on?
6. How do I create a blank action?
7. How do I change a document name?

Task Manager

1. How do I complete multiple tasks?
2. How do I preview tasks/documents?
3. What is the difference between releasing an action and not releasing an action?
4. How do I work on a task from someone else's task list

Search/ Open

1. How do I search closed cases?
2. How do I search for documents on the system?
3. How do I get back to the previous case I was working on when in a different case?
4. How do I search by a specific column?

Case Diary

1. How do I complete an action that is not in my name?

In order to complete an action that is not in your handler initials, you first must take this action. This can be done by right clicking on the action and selecting 'Take Action'. You will notice that the action is now in your initials and from here you can right click and select 'Complete Action'.

2. How do I delete an action?

When you right click on an action there is an option to 'Delete'. When you select this, it will warn you that if you delete the action this cannot be reversed. You can select to 'delete action' or 'cancel'.

3. How to I delete a completed action?

You cannot delete a completed action. First you must un-complete the action. This can be done by right clicking on the action, and selecting 'edit'. This will open the action. From here you must go to the properties tab and take the tick out of the box for 'Complete'. When you select 'Ok', the action will close and it will jump back to the outstanding action. From here you can follow the steps for the Case Diary FAQ 2.

4. How do I amend the date of an action?

You must right click on the action and select 'Edit'. This will open the action. There is a diary date field on the left within this screen. It is this field that determines where the action will appear in the list of outstanding actions in the case diary.

5. How do I put a note on a Case I am working on?

When you are in the Case Diary, go to the 'Home' tab at the top menu bar. On this ribbon there is an icon for 'New Item'. When you select this there are a number of options to select, one being 'Note'. This will create and open an action in the Case Diary, allowing you to enter your note in the Description field. When you select 'Ok', this note will be saved and it will automatically be marked as complete.

6. How do I create a blank action?

When you are in the Case Diary, go to the 'Home' tab at the top menu bar. On this ribbon there is an icon for 'New Item'. When you select this there are a number of options to select, one being 'Action'. This will create and open an action in the Case Diary, allowing you to enter details in the Description field. When you select 'Ok', this action will be saved and be sorted in date order with the other outstanding actions in the Case.

7. How do I change a document name?

If you have an action with a document attachment and you want to change the document name, this can be done by right clicking on the document under the 'Attachment' screen at the bottom of the Case Diary. When you right click you must select 'Properties'. This will open another screen which includes the 'Document Name' field. It is possible to amend this field here. When you select 'Ok', it will ask you if you want to also update the action subject, you can select yes or no to this.

Task Manager

1. How do I complete multiple tasks?

By holding down the ‘Ctrl’ key on your keyboard, you can then select various tasks/actions on your list. This will highlight each task you select. Once you have selected all desired tasks you can select the ‘Complete Action’ button on the top menu bar under the ‘Home’ tab.

2. How do I preview tasks/documents?

Within the Task Manager screen, if there is no preview screen to the right you will find a grey button, ‘Preview’. By hovering over this it will expand out a preview panel. You have the choice to pin this down by clicking on the pin icon on the top right of this panel. Within this preview panel there is a box you can tick to then ‘Preview Document’, otherwise it will preview the task/action description.

3. What is the difference between releasing an action and not releasing an action?

If you tick the box to ‘release action’ when assigning it, this will remove the action from your task list and it will only appear in the assigned handler’s task list, meaning you do not need to be notified when this work is completed by another handler. If you do not put a tick in the box to ‘release action’ this means that you want to delegate work but you want this task/action to remain in your task list which means you will know when another handler has completed their work for this task/action.

4. How do I work on a task from someone else’s task list?

If you are viewing someone else’s task list and need to carry out the work for a task/action on their list, you must right click on this task and select ‘Take Action’. This will remove the task from their list and it will automatically be brought into you task list. Where you can then carry out the work required.

Search/ Open

1. How do I search closed cases?

In the Search/Open Screen there is 'View' icon on the top right. By clicking on this icon it will bring up a number of options; 'Open Cases', 'Closed Cases', 'Open and Closed Cases'. Select 'Closed Cases'. You can then carry out a search as normal and it will only search your closed cases.

2. How do I search for documents on the system?

In the Search/Open screen there are a number of options listed in the left column. Near the bottom of this list is 'Document Search'. Select this. You will then get various fields that you can search for documents by. There is also a chevron icon which will bring up advanced search options.

3. How do I get back to the previous case I was working on when in a different case?

When you are in the Case Diary and are looking to go to the previous Case you were working on, the quickest way to do this is by selecting the browse button beside the client name in the Case Diary. This will bring up your recent matters. The previous matter you were working on will be second on this list. Otherwise you can search for any other case from this screen also.

4. How do I search by a specific column?

If you are looking to search for a case by a specific column, e.g. the 'Description' column, you must go to 'Advanced Search'. This can be found in the column on the left in the Search/Open Screen. From here you can search by specific columns.