



KEYHOUSE END USER MANUAL

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Typographical conventions



Tip A tip is a type of note that helps users apply the techniques and procedures described in the text to their specific needs. A tip suggests alternative methods that may not be obvious and helps users understand the benefits and capabilities of the product. A tip is not essential to the basic understanding of the text.



Note A *note* with the heading “Note” indicates neutral or positive information that emphasises or supplements important points of the main text. A note supplies information that may apply only in special cases. Examples are memory limitations, equipment configurations, or details that apply to specific versions of a program.



Caution A caution is a type of note that advises users that failure to take or avoid a specific action could result in loss of data.



Important An important note provides information that is *essential* to the completion of a task. Users can disregard information in a note and still complete a task, but they should not disregard an important note.

Navigating the Search Screen

 All Matters	Click on All Matters to list all matters.
 My Matters	Click on My Matters to list all your matters
 Recent Matters	Click on Recent Matters to list matters recently accessed.
 Contacts	Click on Contacts to list all your clients and matters  Note this is for Fee Earners only.
 Associates	Click on Associates to list all associates on the Database
 Advanced Search	Click on Advanced Search to perform a more specific search on all matters.
 My Invoices	Click on My Invoices to add, view or edit any draft invoices you have.
 My Cheques	Click on My Cheques to add, view or edit any draft invoices you have.
 Phone Log	Click on the Phone Log to add or view items in the phone log
 Firm Undertakings	Click on Firm Undertakings to see all undertakings given or received by the organisation
 Strong Room	Click on Strong Room to view or add items in your strong room.
 Firm Undertakings	Click on Firm Undertakings to see all undertakings given or received by the organisation
 Document Search	Click on Document Search to search all documents.
 Template Library	Click on Template Library to Search and preview your precedent bank of documents.

Chapter 1: Getting Started

Opening Case Management

1. Start Keyhouse by **double-clicking** the Keyhouse shortcut on your Desktop.
2. The first time you log in, you will have to use your **Handler Code and Password**. If you have previously enabled the use of your **Windows ID**, you may log in without having to enter your password.
3. Enter your **Handler Code** (typically your initials) and password. If you wish to log in in future using your **Windows ID**, check the box labelled **Link this login to your Windows Login**
4. Once you have logged in, you will be presented with a choice of where to start: **Recent Matters, Task Manager or My Overview**





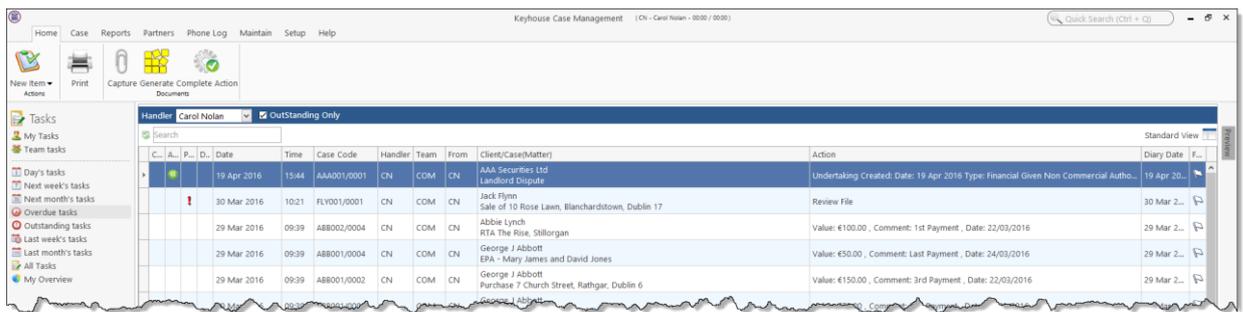
If you will always want to start in the same place, tick the box marked **Don't show this screen again.**



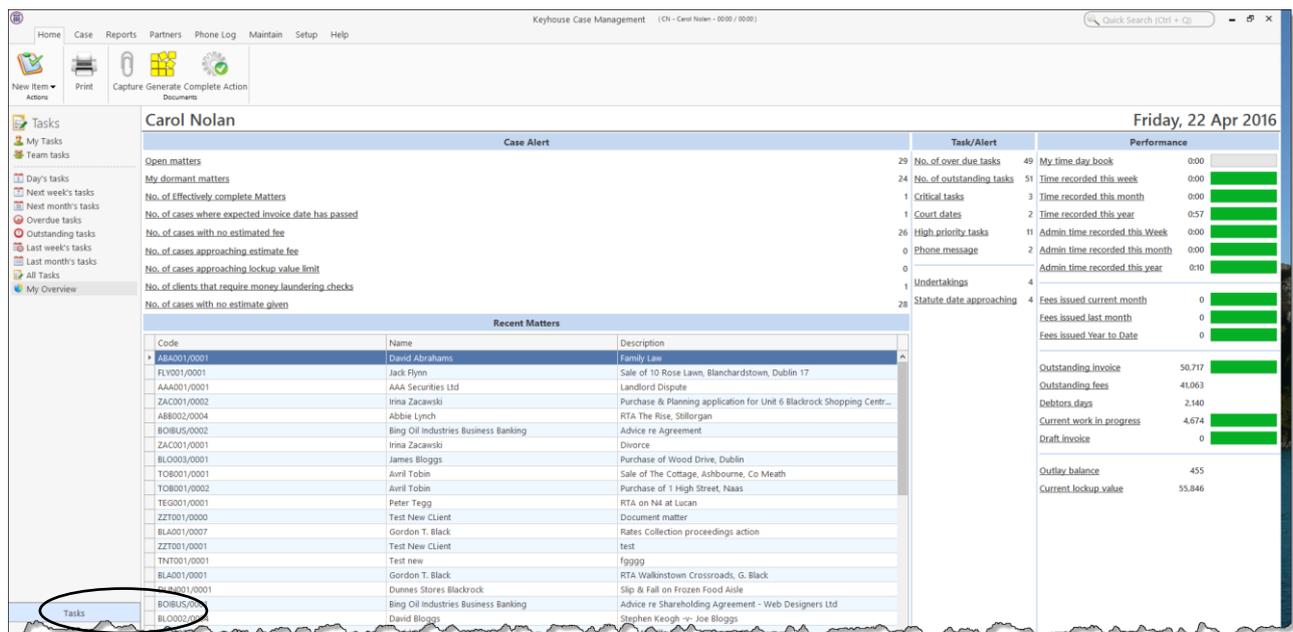
5. **Recent Matters** will allow you to view all your cases, with those most recently accessed at the top.

Code	Last Accessed	File Colour	Name	Description	Fee Earner	Fee Co...	File Ref
SIM001/0001	20 Jul 2015 17:08:19		Bart Simpson	Sale of House at: 4 The Mews, Rathfarn...	Carol Nolan	CN	FLY001
FLY001/0001	20 Jul 2015 16:33:04		Jack Flynn	Sale of House at: 4 The Mews, Rathfarn...	Carol Nolan	CN	FLY001
BRE001/0001	16 Jul 2015 16:23:29		Mike Breeze	Mike slipped an broke his leg.	Martina Win...	MW	BRE001/001
TJF001/0000	16 Jul 2015 16:23:06		TJ Fox	Document matter	Stephen Ke...	SK	
TJF001/0001	16 Jul 2015 15:54:20		TJ Fox	Outstanding debt to PTSB Bank.	Mark Kelly	MK	TJF001
ZZT001/0000	15 Jul 2015 17:28:36		Test New CLie...	Document matter	Stephen Ke...	SK	
FOX001/0001	14 Jul 2015 12:13:37		Jennifer Fox	Redundancy advice	Martina Win...	MW	
KEO003/0003	06 Jul 2015 09:19:51		Sam Keogh	EPA to Stephen Keogh	Carol Nolan	CN	
BRO001/0001	03 Jul 2015 15:09:49		Kevin Browne	78 Somerset Road, Ealing, London W5 5Y	Brian Sween...	BS	123
DUN /0001	03 Jul 2015 12:03:07		Zach Dunne	Advice on Car Accident	Brian Sween...	BS	
NOL001/0001	03 Jul 2015 12:02:55		Paula Nolan	Paula Nolan V Joe Smith	Anne Mellon	AM	6666666
DUN001/0002	03 Jul 2015 12:02:44		Dunnes Store...	Fall at Meat & Poultry Aisle	Brian Sween...	BS	
DUN002/0002	03 Jul 2015 11:40:18		Dunnes Store...	Supplier Accident in Stock Room	Brian Sween...	BS	
FLY001/0002	03 Jul 2015 11:35:31		Jack Flynn	Purchase of 16 The Haywain, Terenure,...	Carol Nolan	CN	FLY002/001

6. Task Manager will show you your task list.

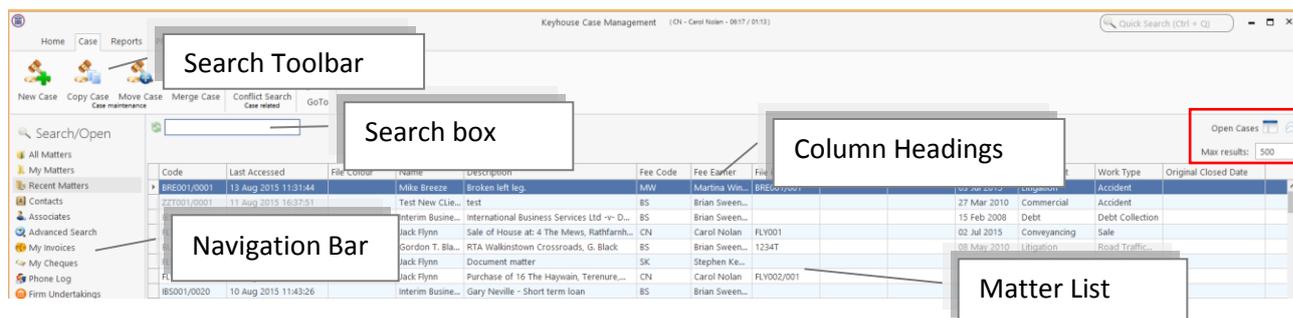


7. My Overview gives you an overview of the current state of your cases, including a list of **Recent Matters**; **Case Alert**, containing links to lists of cases where, for example, the expected invoice date has passed; **Task Alert**, again containing links to list of tasks which may give rise to concern, such as tasks where the Statute Date is approaching; and various **Performance** indicators.



Chapter 2: Search & Open

The Search Screen

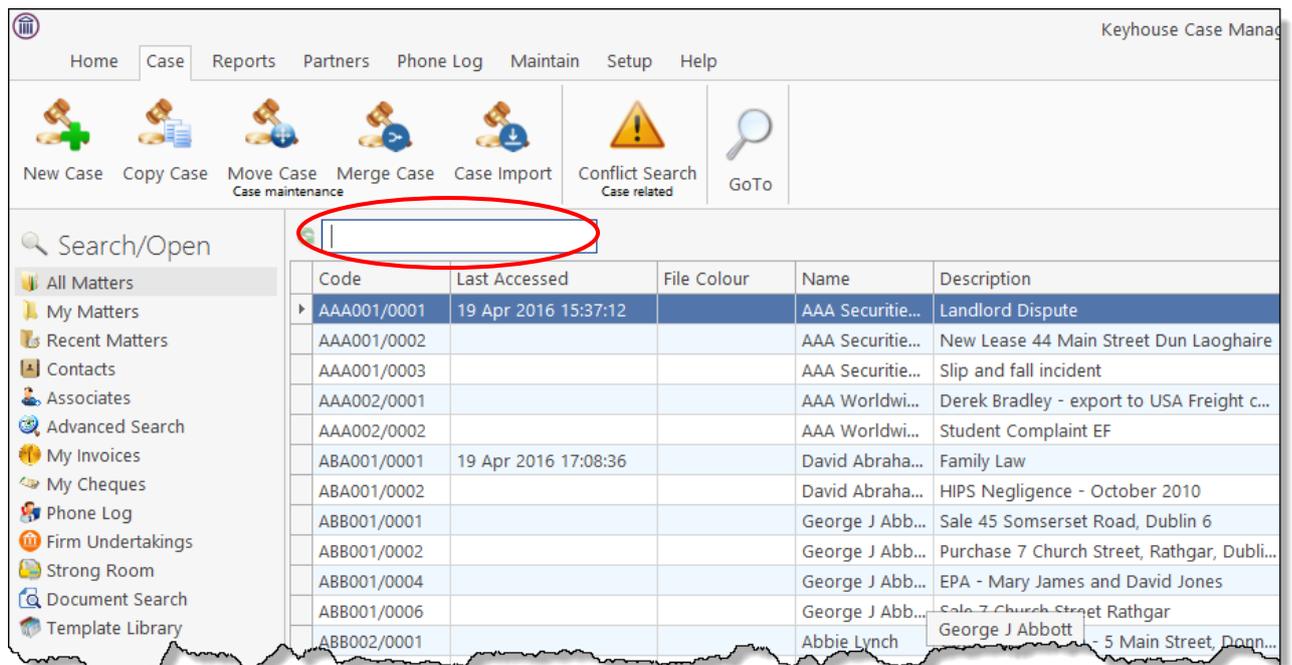


-  **Tip:** Click on a column headings to sort alphabetically by that heading eg. Matter Description or click on the pin to apply a filter . The filter is available on Fee Code, Fee Earner, Dept, Work Type, File Colour and closed only.
-  **Tip:** To remove filters right-click and then click on remove filters
-  **Tip:** The number of results returned can be set. The minimum number is 100 and the maximum number is 500.

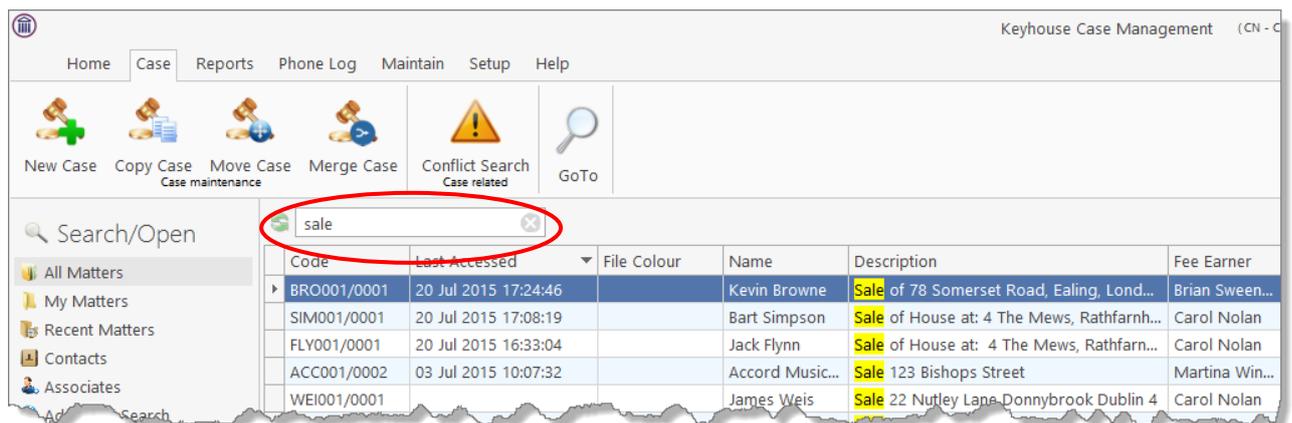
Search Lists

Search All Matters List

1. Click on **Search/Open** on the Navigation bar.
2. Click on **All Matters** input a key search word in the **Search Box** for e.g. part of the client name or matter description.



3. The search criteria will be applied as you type. See the following example of a search for “Sale”.

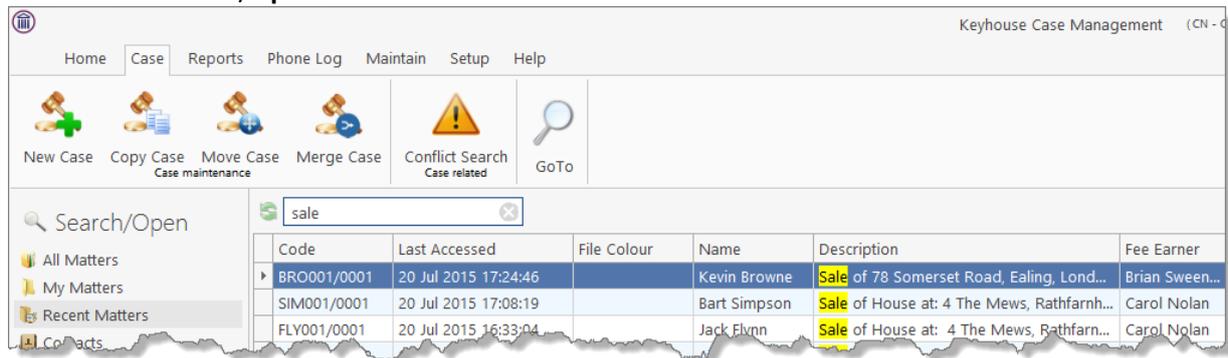


4. **Double click** the required matter to access the case diary for this matter.

Search Recent Matters

This is an easy way to find a matter you have recently worked on.

1. Click on **Search/Open**.



2. Click on Recent Matters in the Navigation panel.

3. **Input** a key search word in the **Search Box**; the search will be applied as you type eg. "Sale".

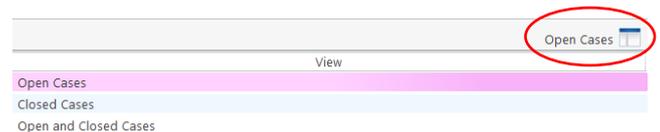
4. **Double click** the required matter to open the case diary for this matter.

How to Search Open and Closed Cases

1. Click on **Search/Open** on the Navigation bar.

2. Click on All Matters.

3. Click on **Standard view tool** located on the following list of views will appear.



- Click on Closed Cases to search only closed cases
- Click on Open Cases to search only open cases.
- Click on Open and Closed to search both lists.
- Click on Standard View to return to the default view.

4. **Input** a key search word in the **Search Box**: the search criteria will be applied as you type.

5. **Double click** the required matter to open the closed case diary for this matter.

Note no amendments can be made in the case diary until the case is re-opened. See the Chapter 16 for further details.

Search Contacts

1. Click on **Search/Open**.
2. Click on **Contacts** to see a list of your clients; as you select each client the cases for that client are listed in the case list in the lower part of the window. Double click the required case to open the case diary.

The screenshot shows the Keyhouse Case Management interface. At the top, there are navigation tabs: Home, Case, Reports, Phone Log, Maintain, Setup, Help. Below these are icons for New Case, Copy Case, Move Case, Merge Case, Conflict Search, and GoTo. The main area is divided into two sections: 'My Contact' and 'Matters (AAA001)'. The 'My Contact' section has a search box and a table of clients. The 'Matters (AAA001)' section has a search box and a table of cases.

Client Code	Name	Address	Telephone	Email	Fe
AAA001	AAA Securities Ltd	44 Main Street Dun Laoghaire	012112112		MW
AAA002	AAA Worldwide Remo...	South Mall Cork	021 1241241	mareynolds@AAAworldwideremovals.ie	SK
ABA001	David Abrahams	123 Mayfair Street Dublin 2	01-2902222	d.abrahams@gmail.com	AM
ABB001	George J Abbott	60 Somerset Road, Ranelagh,	01-5656712	gabbott@iol.ie	BS
ABB002	Abbie Lynch	14 The Mews Dublin 12	01 456789	a.lynych@hotmail.com	SK
ACC001	Accord Music World Ltd	56 Second Street Bray	01 200000		MW
AIG001	Allied Investment Group	1 High Street, Dublin	1234567890	info@aiglegal.ie	BS
AIN001	Allied Investment Netw...	44 Main Street Domybrook	6677889	andrew@ain.ie	BS

Case Code	File Color	Description	Fee Earner	Deptment	Worktype	Started	Case Code	Name	User1	User2	User3	Privileges
AAA001/0001		Landlord Dispute	Martina Wint...	Litigation	Action	06 Jun 2010	AAA001	AAA Securitie...				-1
AAA001/0002		New Lease 44 Main Street Dun...	Martina Wint...	Commercial	Lease	31 Jan 2010	AAA001	AAA Securitie...				-1

3. To search the list **input** a key search word in the **Search Box**: as you type the search criteria will be applied. See the following example for a search for “Accord”.

The screenshot shows the Keyhouse Case Management interface with a search for 'accord' applied. The 'My Contact' table now only shows the entry for 'Accord Music World Ltd'. The 'Matters (ACC001)' table shows the corresponding case for 'Accord Music World Ltd'.

Client Code	Name	Address	Telephone	Email	Fe
ACC001	Accord Music World Ltd	56 Second Street Bray	01 200000		MW

Case Code	File Color	Description	Fee Earner	Deptment	Worktype	Started	Case Code	Name	User1	User2	User3	Privileges
ACC001/0002		Sale 123 Bishops Street	Martina Wint...	Commercial	Sale	14 Jul 2010	ACC001	Accord Music...				-1

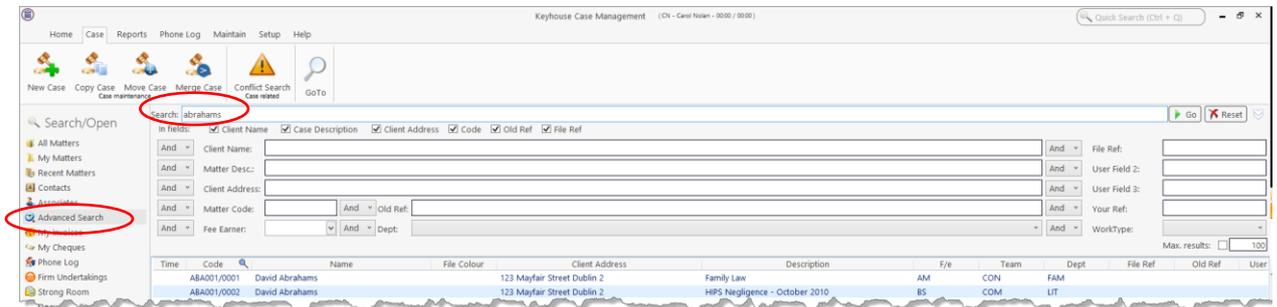


Tip: To view further details about a client double click the required client record.

4. To open the case diary double click the case required.

The Advanced Search

1. Click on Search/Open Cases.
2. Click on **Advanced Search** to see the advanced search options screen.



Simple Search

1. **Input** the key search words in the search box (circled above).
2. Press Enter on your keyboard or click **Go**. 
3. The **results** will be returned in the matter list in the lower part of the window.
4. **Double click** the required case to open it in the case diary.
5. Click **Reset** to clear the search box. 

"OR" Search

This will refine the search to search for keywords in the specified columns only. E.g. A search for the client name or Matter Description.

1. **Remove** the **ticks** from the columns you do not want to include in the search.

Search:	<input type="text" value="Ireland"/>
In fields:	<input checked="" type="checkbox"/> Client Name <input type="checkbox"/> Case Description <input type="checkbox"/> Client Address <input type="checkbox"/> Code <input type="checkbox"/> Old Ref <input type="checkbox"/> File Ref

2. **Input** the **key search words** in the search box.
3. Click on **Go**. The results will be returned in the matter list in the lower part of the window.

Sample Search:

Search For: **Ireland**

In fields: Client Name

4. **Double click** to open the case diary.

It is also possible to use the “Or” Search to search when you need to use 2 or more criteria.

Search:

In fields: Client Name Case Description Client Address Code Old Ref File Ref

Or Client Name:

Or Matter Desc.:

And Client Address:

And Matter Code: And Old Ref:

And Fee Earner: And Dept:

“And” Search

This will refine the search to search a combination of keywords in the specified columns. E.g. A search in the client name and matter description.

1. **Input** the key search words in any of the search boxes.

Search:

In fields: Client Name Case Description Client Address Code Old Ref File Ref

And Client Name:

And Matter Desc.:

And Client Address:

And Matter Code: And Old Ref:

And Fee Earner: And Dept:

2. Click **Go**.
3. The results will be returned in the matter list in the lower part of the window. See the example above

Sample Search “And”

Search for: “Abbot” in the client name
and Search for “Sale” in the matter description
and Search for “Dublin” in client address

4. **Double click** to open the case diary of the required matter.

Searching using a Wildcard

A wildcard is useful when you are unsure of how exactly a word may have been entered. The % sign is used as a wildcard in Keyhouse systems and will match any number of characters. Note also the system will use the % for an apostrophe e.g. O'Connor will change to O%Connor.

1. **Input** the first part of the **client's address**, then a % then the remaining part in the search box, e.g. Ellis%Rathmines and press enter.
2. The system will return any client addresses beginning with **Ellis** ending with **Rathmines**. E.g. Ellis Park or Ellis Drive etc.

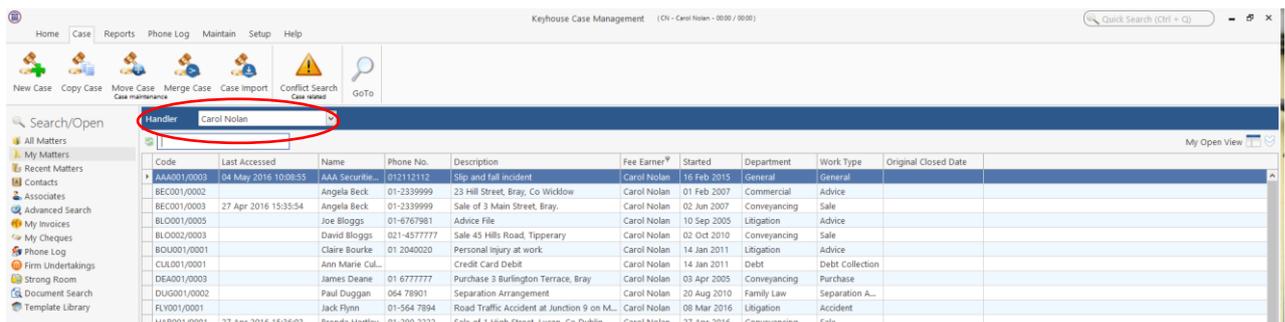


The screenshot shows a search interface with a search box containing 'Ellis%Rathmines'. Below the search box are several filter fields: Client Name, Matter Desc., Client Address, Matter Code, Old Ref., Fee Earner, and Dept. The search results are displayed in a table with columns: Time, Code, Name, File Colour, Client Address, Description, F/e, and Team.

Time	Code	Name	File Colour	Client Address	Description	F/e	Team
	BLA001/0001	Gordon T. Black		23 Ellis Park Rathmines Dublin 6	RTA Walkinstown Crossroads, G. Black	BS	COM
	BLA001/0002	Gordon T. Black		23 Ellis Park Rathmines Dublin 6	2 Trinity Close, Rathgar, Dublin 6	BS	COM
	BLA001/0004	Gordon T. Black		23 Ellis Park Rathmines Dublin 6	Purchase of 8 Clonattin Hills, Wicklow.	SK	COM
	BLA001/0007	Gordon T. Black		23 Ellis Park Rathmines Dublin 6	Rates Collection proceedings action	BS	COM

My Matters

1. This will only allow you to see your matters. It will display them with the most recent at the top.
2. By using the drop down arrow beside the Handler's name, it is possible to view the matters of other individuals.



The screenshot shows the 'My Matters' view in the Keyhouse Case Management system. The interface includes a navigation menu on the left and a main table of cases. The 'Handler' column is highlighted, and a dropdown arrow is visible next to the name 'Carol Nolan'.

Code	Last Accessed	Name	Phone No.	Description	Fee Earner*	Started	Department	Work Type	Original Closed Date
ADA001/0003	04 May 2016 10:08:55	Ava Searcote	0121112112	Stop and Jail incident	Carol Nolan	16 Feb 2015	General	General	
BEC001/0002		Angela Beck	01-2339999	23 Hill Street, Bray, Co Wicklow	Carol Nolan	01 Feb 2007	Commercial	Advice	
BEC001/0003	27 Apr 2016 15:35:54	Angela Beck	01-2339999	Sale of 3 Main Street, Bray.	Carol Nolan	02 Jun 2007	Conveyancing	Sale	
BLO001/0005		Joe Bloggs	01-6767981	Advice File	Carol Nolan	10 Sep 2005	Litigation	Advice	
BLO002/0003		David Bloggs	021-4577777	Sale 45 Hills Road, Tipperary	Carol Nolan	02 Oct 2010	Conveyancing	Sale	
BOU001/0001		Claire Bourke	01 2040020	Personal Injury at work	Carol Nolan	14 Jan 2011	Litigation	Advice	
CLU001/0001		Ann Marie Cul...		Credit Card Debit	Carol Nolan	14 Jan 2011	Debt	Debt Collection	
DEA001/0003		James Deane	01 6777777	Purchase 3 Burlington Terrace, Bray	Carol Nolan	03 Apr 2005	Conveyancing	Purchase	
DUG001/0002		Paul Duggan	064 78901	Separation Arrangement	Carol Nolan	20 Aug 2010	Family Law	Separation A...	
FLY001/0001		Jack Flynn	01-564 7894	Road Traffic Accident at Junction 9 on M...	Carol Nolan	08 Mar 2016	Litigation	Accident	
HAR001/0001	27 Apr 2016 15:36:03	Brenda Hartley	01-290 2222	Sale of 1 High Street, Lucan, Co Dublin	Carol Nolan	27 Apr 2016	Conveyancing	Sale	

Manipulating the Search Screen

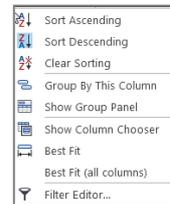
The new version of the Keyhouse Desktop has several user friendly options to allow you the user to alter the arrangement of your search screen. You can sort and filter by column heading, and save for further use if required.

How to Sort Column Headings

1. Click on the column heading to sort by that heading. See the example below the column the sort has been applied to column heading "Last Accessed".

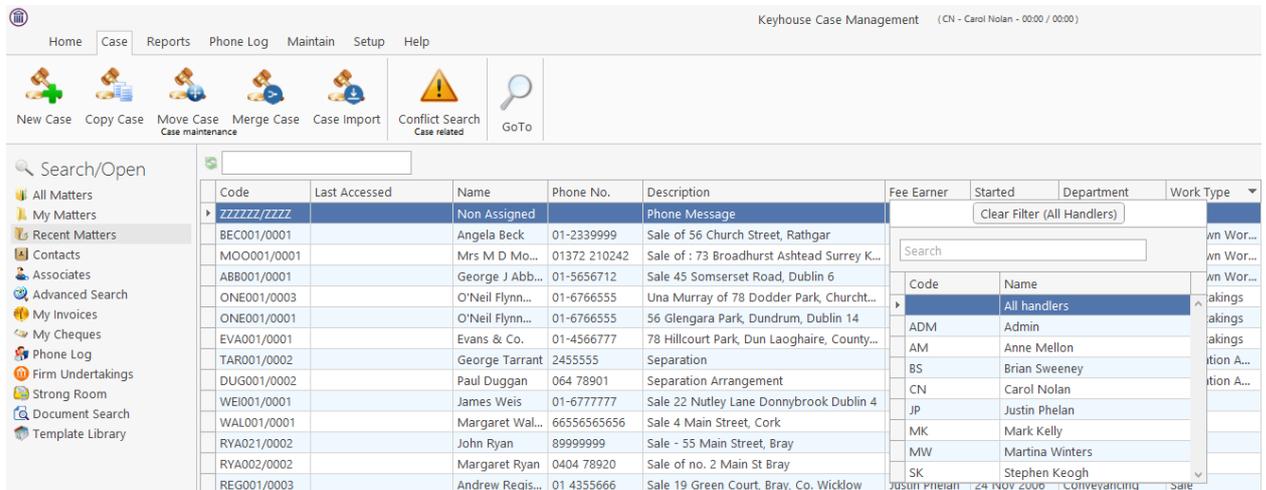
Code	Last Accessed	File Colour	Name	Description	Fee Co...	Fee Earner
SIM001/0001	21 Jul 2015 09:53:45		Bart Simpson	Sale of House at: 4 The Mews, Rathfarn...	CN	Carol Nolan
FLY001/0001	21 Jul 2015 08:45:22		Jack Flynn	Sale of House at: 4 The Mews, Rathfarn...	CN	Carol Nolan
KEO003/0003	06 Jul 2015 09:19:51		Sam Keogh	EPA to Stephen Keogh	CN	Carol Nolan
FLY001/0002	03 Jul 2015 11:35:31		Jack Flynn	Purchase of 16 The Haywain, Terenure,...	CN	Carol Nolan
BLO001/0005	03 Jul 2015 10:58:17		Joe Bloggs	Advice File	CN	Carol Nolan
BOU001/0001	03 Jul 2015 10:28:10		Claire Bourke	Personal Injury at work	CN	Carol Nolan

- To remove the sort right-click on the column and select **Clear Sorting** from the resulting menu.



How to Filter Columns

- Move your cursor to the column heading required, until you see the filter pin. 
- Clicking on the filter pin will open a drop-down menu; select the required filter term.



- To remove the filter, select **Clear Filter (All Handlers)** from the filter drop-down menu or use the right-click to select the **Clear Filter (All Handlers)** option.

Document Search

The document search utility makes it possible to search the full text of all documents on the system. A list of documents containing the search text is returned and each document can be previewed in the preview pane.

How to open the Document Search

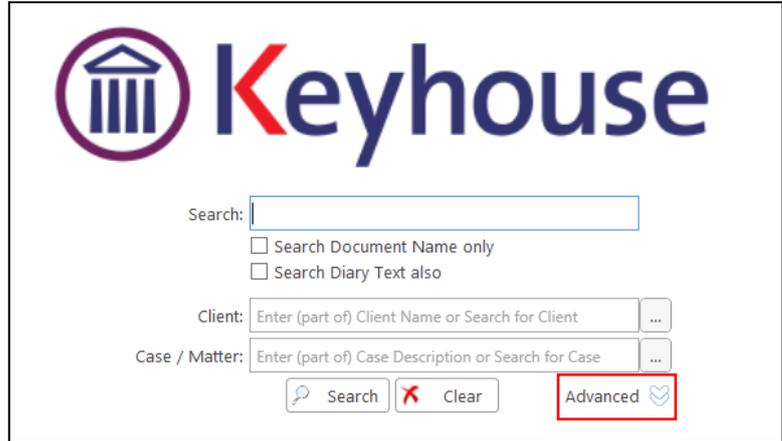
1. Click on **Search/Open**, then on **Document Search**

2. Input the search keywords on the Document Search screen.

3. Choose whether you want to search by the Document Name or by Diary Text.

4. Optional -

- Select a client, or leave blank to search against all clients.



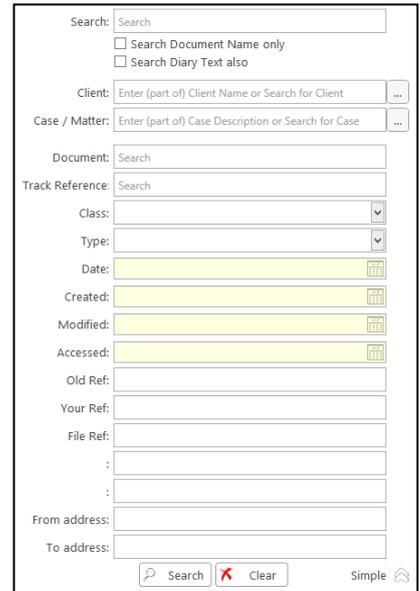
The screenshot shows the Keyhouse logo at the top left. Below it is a search form with the following elements:

- A search input field labeled "Search:".
- Two checkboxes: "Search Document Name only" and "Search Diary Text also".
- A "Client:" field with a placeholder "Enter (part of) Client Name or Search for Client" and a dropdown arrow.
- A "Case / Matter:" field with a placeholder "Enter (part of) Case Description or Search for Case" and a dropdown arrow.
- Three buttons: "Search" (with a magnifying glass icon), "Clear" (with a red 'X' icon), and "Advanced" (with a heart icon, highlighted with a red box).

- Select a matter or leave blank to search against all matters.

5. To refine the search use the Advanced Option

6. Click **Search**. A list of documents that match the criteria will be displayed



The screenshot shows the advanced search form with the following elements:

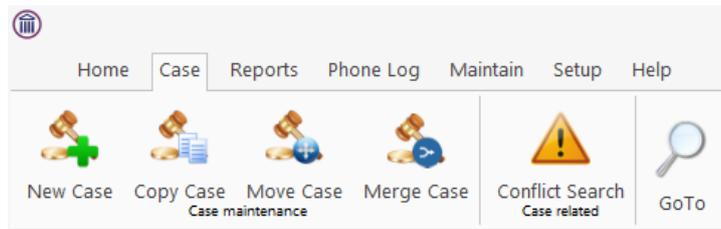
- A search input field labeled "Search:".
- Two checkboxes: "Search Document Name only" and "Search Diary Text also".
- A "Client:" field with a placeholder "Enter (part of) Client Name or Search for Client" and a dropdown arrow.
- A "Case / Matter:" field with a placeholder "Enter (part of) Case Description or Search for Case" and a dropdown arrow.
- A "Document:" field with a placeholder "Search".
- A "Track Reference:" field with a placeholder "Search".
- A "Class:" dropdown menu.
- A "Type:" dropdown menu.
- A "Date:" field with a calendar icon.
- A "Created:" field with a calendar icon.
- A "Modified:" field with a calendar icon.
- A "Accessed:" field with a calendar icon.
- An "Old Ref:" field.
- A "Your Ref:" field.
- A "File Ref:" field.
- A ":" field.
- A ":" field.
- A ":" field.
- A "From address:" field.
- A "To address:" field.
- Three buttons: "Search" (with a magnifying glass icon), "Clear" (with a red 'X' icon), and "Simple" (with a heart icon).

Chapter 3: Creating New Clients and Cases

The New Case Wizard

Create a New Case for an Existing Client

1. Select **New Case** which can be found on the **Case** tab of the Ribbon.



2. The **New Matter/Case Wizard** will open. The first screen contains a welcome message. Click **Next**.

3. The default option is to set up a new case for an existing client or contact.

4. Input all or part of the client's name or code in the search box. The search results will update as you type.



You can sort the columns by clicking on the column headings.

5. **Select the client** required and click **Next**. In this case, the wizard will skip Step 3 and you will move immediately to Step 4.

6. If the client is not an existing client or contact, select **Client is not listed above** and click **Next**.

7. The screen for Step 3 asks for details of the new client. Type the first three letters of the Client's surname into the box for **Client code**. The system will complete the code by adding three digits.

8. As well as **Client code**, **Client name** and **Fee Earners** are required fields.

New Matter/Case Wizard

New or Existing Client

Step 1/7 Step 2/7 Step 3/7 Step 4/7

Select the option that describes the action you wish to take

• Select an existing client for an matter

Code	Name	Address
AAA001	AAA Securities Ltd	44 Main Street
AAA002	AAA Worldwide Removals	South Mall
ABA001	David Abrahams	123 Mayfair Street
ABB001	George J Abbott	60 Somerset Road,
ARR002	Abhie Lvrch	14 The Mews

Client is not listed above. Create new client for this new matter

Previous Next

New Matter/Case Wizard

New or Existing Client

Step 1/7 Step 2/7 Step 3/7 Step 4/7

Select the option that describes the action you wish to take

• Select an existing client for an matter

Code	Name	Address
KEO003	Sam keogh	Main Street
ZZKE01	Stephen keogh	1 Main Street

Client is not listed above. Create new client for this new matter

Previous Next

New Matter/Case Wizard

Enter Client Details

Step 1/7 Step 2/7 Step 3/7 Step 4/7

Please enter the new clients details below.

Client code * BAR

Client name * Enter client name

Salutation Enter salutation PPS NO Enter PPS number

Address Enter client address

Telephone Enter telephone Fax Enter fax number

Mobile Enter mobile number Email Enter email ID

Fee Earners * Select fee earner Secondary Email Enter secondary email ID

Anti money laundering checked

Previous Next

9. Click **Next** to move to Step 4 where the main details of the matter or case will be entered.

Input the matter description, then select the following from the relevant drop-down lists:

- **Fee Earner** handling the matter
- **Department** (e.g. Conveyancing, Litigation)
- **Case Plan** (i.e. workflow)
- **Secretary** the person working on the case
- The **Partner** with responsibility for the matter
- **Work Type** the workflow to be used
- **Branch** will indicate if branch of the firm.

10. Click **Next** to continue to the next step. Most of the information sought by this screen is optional but that shown in bold italics below may be required, depending on your system settings:

- Old Reference
- Your Reference (i.e. the client's reference, if any)
- Three additional reference fields, the prompts for which may vary from one system to another
- The **File Colour** option will allow you to set the colour as the matter is being created.
- The **Estimate of Fees** – check the box if the fees are fixed
- The **Expected Bill Date**
- The **Budget Outlay**

11. Click **Next** to continue to the next screen. Here you will be given a number of questions which, when answered, will allow you to add in Extra Case Details. The questions asked will vary depending on the Case Plan selected.

12. Click **Next** to continue to the final screen.

13. There are three final options on this screen, including printing a client and/or matter label.



If you choose to copy details from another matter, a new wizard will start. See the next

Enter Matter Description (Step 2/7, Step 3/7, Step 4/7)

You must enter a description for the matter

Client Name: Kevin Barrett

Description: Type the description for the matter. ex: Joe Bloggs vs John Smith. Purchase of main street Dublin.

Fee Earner: Select fee earner, Partner: Select partner, Department: Select department, Work Type: Select work type, Case Plan: Select case plan, Branch: Select branch, Secretary: Select secretary

Buttons: Previous, Next

Ref. and Estimate Fee (Step 1/7, Step 2/7, Step 3/7, Step 4/7, Step 5/7)

Enter optional other case reference below.

Old Reference: Enter old reference, File Ref: Enter File Ref, Your Ref: Enter Your Ref, REF 2: Enter REF 2, REF 3: Enter REF 3, File Colour: Select file colour, Estimate Fee: 0.00, Expected Bill Date: Enter expected date, Outlay Budget: 0.00

Buttons: Previous, Next

Other Case Details (Step 3/7, Step 4/7, Step 5/7, Step 6/7)

Detail	Value	Category
List the Contents passing with the house (if any).		
Contents NOT passing with property? (if any)		
Sale Price of property (e.g. 100,000.00)		
Deposit Amount in full (e.g. 10,000.00)?		
Description of the property for the Contract.		
Title Deeds to be listed in Documents Schedule in the Contract.		
Is the property serviced with drainage? "Yes" or "No"		
Is the Property serviced with Water? "Yes" or "No"		
Is there an electricity service (Yes or No)?		

Buttons: Previous, Next

Ref. and Estimate Fee (Step 4/7, Step 5/7, Step 6/7, Step 7/7)

Click finish to create new matter.

Options: Copy matter details from another matter, Print client label, Print matter label

Buttons: Previous, Finish

section, **Copy Matter Details** for more information.

14. Click **Finish**. The matter has now been created and is available in the Case Diary.

Copy Case Details

1. Click on the **Copy Case tool**  located on the **Case** tab of the Ribbon to open the **Copy Case/Matter Wizard**, which starts with a welcome screen.

 **NOTE:** As seen in the previous section, the **Copy Case Wizard** may also be started by checking the relevant box on the final screen of the **New Case Wizard**.

2. Click **Next** to continue to Step 2.

3. **Select** a source matter by clicking the  **browse button**.

 This will bring up a matter list which may be searched as described in Chapter 2.

4. **Double-click** the matter from which the details are to be copied. The matter list will close and the code of the selected case will be entered in the first box on the Step 2 screen.

5. Select the destination matter in the same way.

 **Note** if you started the **Copy Case wizard** from the final screen of the **New Case wizard**, the destination matter will already be filled in.

6. Click **Next** to continue to Step 3, which lists the **User Defined Fields** (UDFs) which are in use in the source matter.

7. The **UDFs** can be sorted, grouped and filtered as required, to make it easier to find and select those which are to be copied to the destination matter.

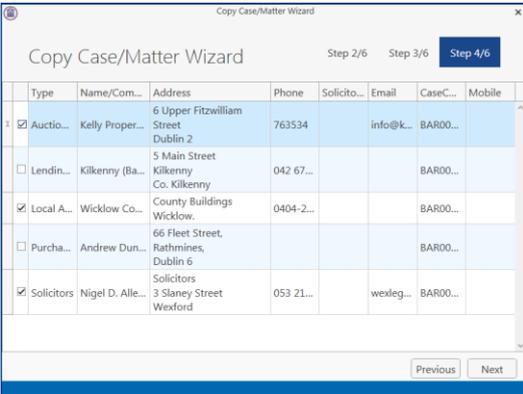
8. Check the corresponding boxes to select the fields which, together with their values, should be copied to the destination matter.

9. Click **Next** to continue to Step 4.

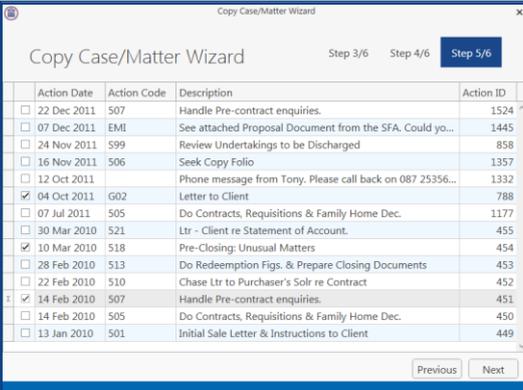
Code	Name	File Colour	Client Address	Description
AA001.0004	AAA Securities Ltd		44 Main Street Dun Laoghaire Co Dublin	Sale of 2 High Street, London
AB001.0007	George J Abbott		60 Somerset Road, Ranelagh, Dublin 6.	Sale of 1 Main Street, Heath, Co. Dubli
CUL001.0001	Alex Marie Cullen		101 Dun Emer Drive Duncrum Dublin 14	Credit Card Debt
DUN001.0001	John Dune		44 Ellis Drive Rathmines Dublin 8	Sale of Village Hall
AB001.0001	Aldrey & Procter		14 The Mews Dublin 12	Commercial
FE001.0001	Melinda Macdermid		12 Eaton Brae Ormeau Road Rathgar Dublin 14	Sale of lands in Wicklow
BLA001.0001	Gordon T. Black		23 Ellis Park, Rathmines, Dublin 6.	RTA Walkdown Crossroads, G. Black
BLA001.0000	Gordon T. Black		23 Ellis Park, Rathmines, Dublin 6.	0000 Matter
AA001.0003	AAA Securities Ltd		44 Main Street Dun Laoghaire Co Dublin	Sale of 1 Main Street, Lough Co. Wick
FE001.0001	Melinda Fisher		12 Eaton Brae Ormeau Road Rathgar Dublin 6	Sale of Lands in Wicklow
DEA01.0000	James Deane		9 Northbrook Park, Ranelagh, Dublin 6.	0000 Matter
CL001.0001	Bill Clifton		Main Street Bray Co Wicklow	Under disposal by State Department
KIL001.0001	Sarah Kelly		845 sandford Plenum Dublin 14	Debt Collection
AB001.0001	George J Abbott		60 Somerset Road, Ranelagh, Dublin 6.	Sale 45 Somerset Road, Dublin 6
ABA001.0001	David Abraham		123 Mayfair Street Dublin 2	Family Law

Group	Detail	Value
<input checked="" type="checkbox"/>	"T" if single or "we" if joint ?	I
<input checked="" type="checkbox"/>	"my" if the client is single else "... my"	my
<input type="checkbox"/>	Estimated Date of Closing.	15th March 2009
<input checked="" type="checkbox"/>	Folio Number ?	98659
<input type="checkbox"/>	Townland	
<input checked="" type="checkbox"/>	Which County ?	County Dublin
<input type="checkbox"/>	Date of Contract	N/A
<input checked="" type="checkbox"/>	Loan Account Number ?	1258745 AE
<input type="checkbox"/>	Balance of Sale Price ?	587,000
<input type="checkbox"/>	Agreed Valuation of Househo...	12,000
<input type="checkbox"/>	Is the property the Vendor's Fa...	Yes
<input checked="" type="checkbox"/>	Has there been any unauthoris...	No
<input type="checkbox"/>	Duration of Lease term.	N/A

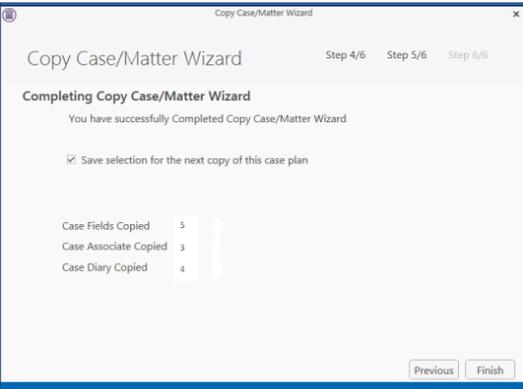
10. In Step 4, the **Case Associates** in the source matter are listed.
11. Again, you may filter or sort the Case Associates to make it easier to select those to be copied.
12. Check the corresponding boxes to select the Case Associates you wish to copy to the destination case.
13. Click **Next** to continue to Step 5, which lists the actions in the source matter.
14. The procedure for selecting and copying the actions to the destination matter is similar to those for copying UDFs and Case Associates.
 -  If you copy any action to the destination matter you will also copy any documents attached to that action.
15. Click **Next** to continue to the final screen.
16. If you check the **checkbox**, details of the fields, Case Associates and actions which were copied, will be saved so that they will be selected by default the next time this source matter is copied. The final screen also provides a summary of the numbers of items copied.
17. Click **Finish** to close the wizard. The copied details are now included in the destination case.



Type	Name/Com...	Address	Phone	Solicito...	Email	CaseC...	Mobile
<input checked="" type="checkbox"/>	Auctio...	Kelly Proper...	6 Upper Fitzwilliam Street Dublin 2	763534		info@k...	BAR00...
<input type="checkbox"/>	Lendin...	Kilkenny (Ba...	5 Main Street Kilkenny Co. Kilkenny	042 67...			BAR00...
<input checked="" type="checkbox"/>	Local A...	Wicklow Co...	County Buildings Wicklow.	0404-2...			BAR00...
<input type="checkbox"/>	Purcha...	Andrew Dun...	66 Fleet Street, Rathmines, Dublin 6				BAR00...
<input checked="" type="checkbox"/>	Solicitors	Nigel D. Alle...	Solicitors 3 Slaney Street Wexford	053 21...	wexleg...		BAR00...



Action Date	Action Code	Description	Action ID
<input type="checkbox"/>	22 Dec 2011	507 Handle Pre-contract enquiries.	1524
<input type="checkbox"/>	07 Dec 2011	EMI See attached Proposal Document from the SFA. Could yo...	1445
<input type="checkbox"/>	24 Nov 2011	599 Review Undertakings to be Discharged	858
<input type="checkbox"/>	16 Nov 2011	506 Seek Copy Folio	1357
<input type="checkbox"/>	12 Oct 2011	Phone message from Tony. Please call back on 087 25356...	1332
<input checked="" type="checkbox"/>	04 Oct 2011	G02 Letter to Client	788
<input type="checkbox"/>	07 Jul 2011	505 Do Contracts, Requisitions & Family Home Dec.	1177
<input type="checkbox"/>	30 Mar 2010	521 Ltr - Client re Statement of Account.	455
<input checked="" type="checkbox"/>	10 Mar 2010	518 Pre-Closing: Unusual Matters	454
<input type="checkbox"/>	28 Feb 2010	513 Do Redemption Figs. & Prepare Closing Documents	453
<input type="checkbox"/>	22 Feb 2010	510 Chase Ltr to Purchaser's Solr re Contract	452
<input checked="" type="checkbox"/>	14 Feb 2010	507 Handle Pre-contract enquiries.	451
<input type="checkbox"/>	14 Feb 2010	505 Do Contracts, Requisitions & Family Home Dec.	450
<input type="checkbox"/>	13 Jan 2010	501 Initial Sale Letter & Instructions to Client	449



Completing Copy Case/Matter Wizard

You have successfully Completed Copy Case/Matter Wizard

Save selection for the next copy of this case plan

Case Fields Copied 5

Case Associate Copied 3

Case Diary Copied 4

Chapter 4: The Case Diary

What is a Case Diary

The case diary is the electronic equivalent of the paper file of a case. It displays a case plan to help guide you through a case. A Case Plan is made up of a series of Tasks/Actions; these actions in turn are made up of documents which are processed when a task is taken. The Case Diary records completed tasks, generated tasks and outstanding tasks. It shows the date of the task, the person assigned to the task, i.e. the handler, and a description of the task. In addition, information on the client and matter details can also be viewed and amended from this screen.

See the following example of the case diary for Case BEC001/003. It is based on the Sale Workflow. It has a number of tasks in the case diary, several are complete tasks and the others are scheduled for a date in the future.

Standard View

The screenshot displays the Keyhouse Case Management software interface. The main window shows a case diary for Case ABA001/0001, handled by David Abrahams. The task list includes various actions such as 'Letter to Solicitor re Pleading', 'Undertaking changed by BRIANS', 'Invoice No:230', and 'Email From:brian@keyhousedemo.ie'. The interface also features a 'Preview' pane on the right showing document details for 'Letter to Solicitor re Pleading'.

C.	A.	P.	D.	A.	Date	Time	Handler	Synopsis	Action Co.	F.
					04 May 2016	14:59	CN	Letter to Solicitor re Pleading	G03	
					27 Jun 2014	11:19	MW	Undertaking changed by BRIANS	ADKMD	
					19 Jun 2014	11:41	BS	Invoice No:230	D801	
					19 May 2014	16:32	BS	Letter from Accountant	G26	
					01 May 2014	23:54	BS	Invoice No:229	D801	
					01 May 2014	22:29	BS	Email From:brian@keyhousedemo.ie - Mobile Call to Brian Sweeney	EMI	
					01 May 2014	12:30	BS	Email From:brian@keyhouse.ie - Practice Management Review Agenda	EMI	
					01 May 2014	00:00	BS	Email To: - Financial Trends for the Economy	EMI	
					27 Feb 2014	09:01	BS	David Abrahams	PHE	
					27 Feb 2014	07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for Key Performance Indicators	EMI	
					16 Jul 2013	15:54	BS	Letter to Solicitor re title Letter to Allsop & Browne	G03	
					09 May 2013	08:47	BS	Accountants Letter	G13	
					17 Apr 2013	11:24	BS	Brian		
					17 Apr 2013	10:27	BS	Email To: - Copy Land Folio	EMI	
					21 Mar 2013	08:43	BS	David	PHO	
					12 Feb 2013	22:29	BS	Innovation Ad	G13	
					18 Dec 2012	18:08	BS	Letter to Solicitor re Financial Statement Let	G03	
					16 Nov 2012	09:11	BS	Email From:"Martina Winters" <martina@k	EMI	
					15 Nov 2012	14:57	BS	Letter to Solicitor re Proceedings Letter to	G03	
					15 Nov 2012	09:53	BS	Email To: - Draft Reseller Agreement	EMI	
					15 Nov 2012	09:03	BS	Phone Call - Advised Client on Court process	EMI	
					05 Oct 2012	11:36	BS	Letter to Solicitor re title Letter to Peter D. Jones & Co.	PHE	

Configuring the Case Diary Screen

The new version of the Case Diary can be configured in different several ways.

How to Configure your Case Diary Screen

Now with the new version of the Case Diary each user can configure their diary screen according to their requirements. For example secretarial staff may generally prefer to view the case plan in their screen while solicitors might only need to see it occasionally.

With the new version, you decide if certain elements such as the case plan should be visible permanently, i.e. fixed, or occasionally, i.e. floating. Likewise others may prefer to have their Document preview pane visible permanently or others to prefer use it occasionally. Below are some examples with instructions on how to create them.

Sample 1: Standard Screen with fixed Floating Document Preview Pane

How to create this view:

1. Move your mouse over **Preview** to the located to right of the Case Diary Screen the document preview pane will appear.

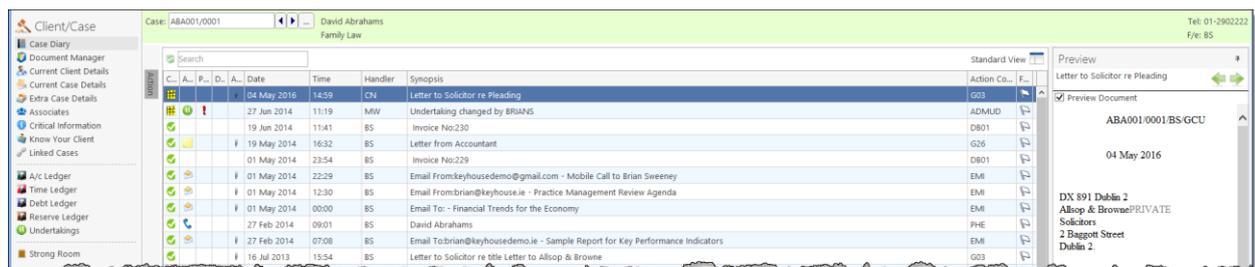


Sample 2: Standard view with fixed document preview pane

How to create this view:

1. Move your mouse over **Preview** located to the right of the Case Diary Screen the document preview pane will appear.

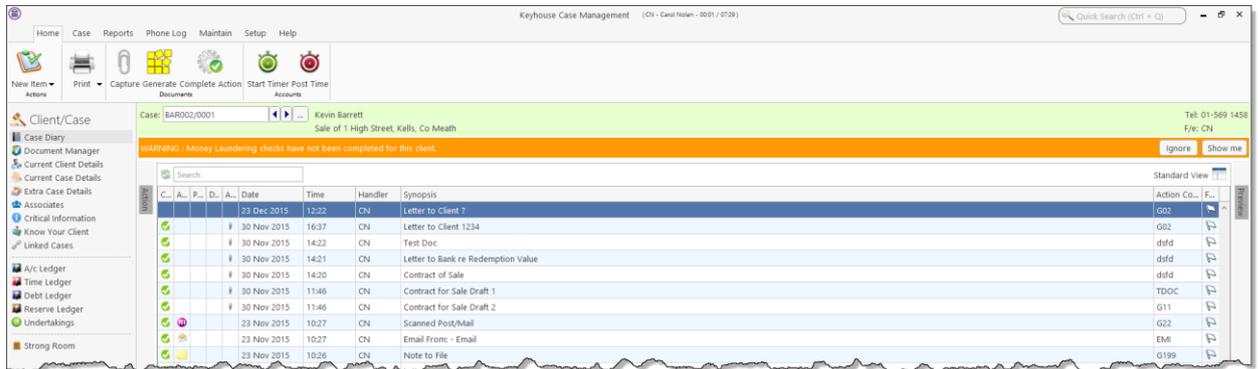
2. Click on the Pin  to make it permanently visible.



Sample 3: Case Diary with Floating Case Plan

How to create this view:

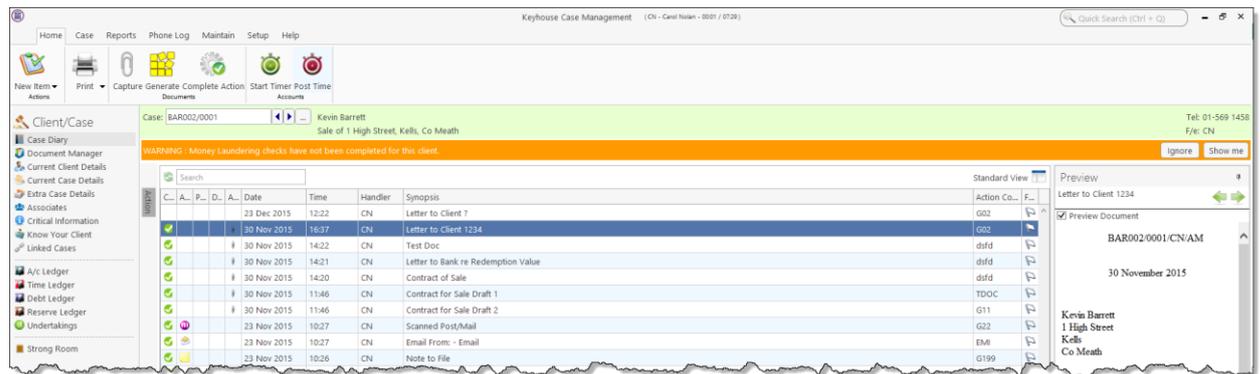
1. Move your mouse over **Action** to the located to left of the Case Diary Screen the Case Plan will appear.



Sample 4: Case Diary with Case Plan fixed and Preview Pane fixed

How to create this view:

1. Move your mouse over **Action** located to the left of the Case Diary Screen the Case Plan will appear.
2. Click on the **Pin**  to make it permanently visible.
3. Then move your mouse over **Preview** located to the right of the Case Diary Screen the document preview pane will appear.
4. Click on the **Pin**  to make it permanently visible.



 **NOTE:** You can also sort the columns by clicking on the column headings in the Case Diary Screen.

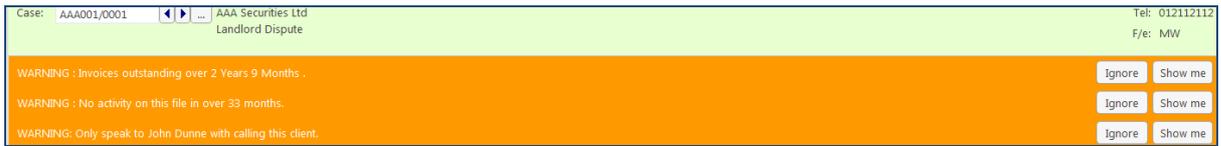
Warning Messages

The new version of Keyhouse displays warning messages on the file which the user can choose to ignore or to show. These messages may contain information on accounts or important information pertaining to this case: please read them.

 **Caution:** Please read any warnings specific to the file as they could be vital information specific to this case.

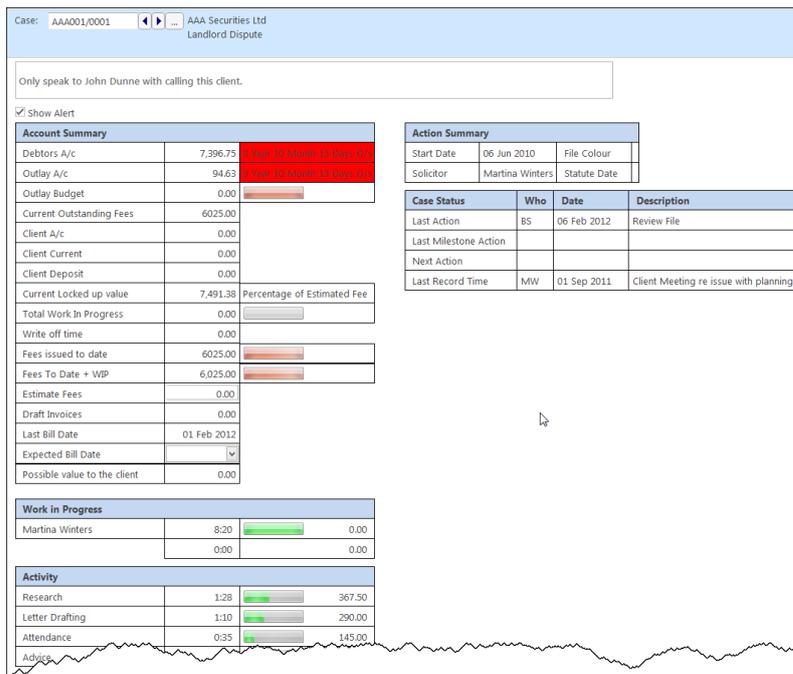
How to Show or Ignore a Message

1. Search for the required case and double click it to open it in the **Case Diary**.



Note these warnings are displayed in the **Case Diary Screen**.

2. The caution messages are displayed at the top of the case diary of each case.
3. Click on the **Show me** button  located to the right of the message you will then move to the **Critical Information Screen** to show further information.



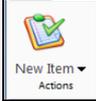
NOTE: The specific warning related to the case can be added via the **Critical Information** shortcut on the navigation panel. Type in message in text box and tick **show alert**.

4. Click on the **Ignore** button  to ignore the message and remove it from the case.

Case Diary Symbols

	Tasks in Yellow denote milestone tasks
	Tasks with a Broken Yellow Box denote documents processed
	Tasks with a Green Tick denote a completed task
	Tasks with a Fixed Date denotes a task that will be completed with the date of generation.
	Tasks with a Red Dot denote a high priority task.
	Tasks with S denote a Statute of Limitation date or a critical date action.
	Tasks with a Calendar Symbol denote an appointment.
	Tasks with a Phone Symbol denote a phone call.
	Tasks with a yellow note denote a Note.
	Tasks with a hand denote a delegated task.
	Tasks with a blue arrow denote tasks of low importance.
	Tasks with U denote an Undertaking.
	Tasks with an envelope denote an email sent or received.
	Tasks with a document attached
	Tasks with an M denote scanned post
	Tasks with a C denote critical tasks
	Task with a building denote Court Dates
	Task denotes Photo ID
	Task denotes Non Photo ID

The Case Diary Toolbar





New Click on the New to add any of these tasks.

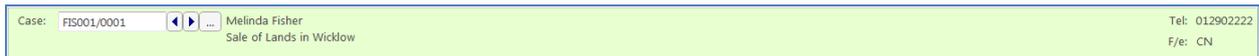
Printer Click to print any of the following reports:

-  Action
-  Note
-  Email
-  Appointment
-  Phone Message
-  Dictation
-  Draft Invoice
-  Request Cheque
-  Conflict Search

-  Activity Report
-  Case Summary Report
-  Matter Label ▶
-  Client Label ▶

G	Capture	Click on capture to launch the document capture program to import documents or folders of documents or images.
 Generate	Generate	Click to generate a document for a selected action.
 Complete Action	Complete Action	Click to mark a task as complete.
 Start Timer	Start Timer	Click to start the timer for the current case.
 Post Time	Post time	Click to bring up a manual time slip.

Navigation within the Case Diary



	Case Code	Case Code of current open case. Or To open a case input the case code and press enter.
	Navigation buttons	Move to the previous Case or go to Next Case.
	Search Case List	Click to search for an existing Case. Double click the required case to open.
	Quick Search	This button is available on all screens and will allow you to quickly find any case.

Case Diary Navigation Panel

 Case Diary	Case Diary	Case Diary Screen
 Document Manager	Document Manager	Click on this to launch the Document Manager
 Current Client Details	Current client Details	Click on this to view or edit the current client details.
 Current Case Details	Current Matter Details	Click on this to view or edit the current case/matter details.
 Extra Case Details	Extra Case Details	Click on this to view extra case details
 Associates	Associates	Click on this to view case associates i.e. professionals or parties connected to this case.
 Critical Information	Critical Information	Click on this to view critical information particular to this case.
 Know Your Client	Know Your Client	Click on this view to see case specific information in a central location.
 Linked Cases	Linked Cases	Click on this screen to see cases that are linked to this case.
 A/c Ledger	Accounts Ledger	Click on this to view the accounts ledger.
 Time Ledger	Debt Ledger	Click on this to view the debt ledger.
 Debt Ledger	Time Ledger	Click on this to view the time ledger.
 Reserve Ledger	Reserve Ledger	Click on this to view the reserve ledger.
 Undertakings	Undertakings	Click on this to view the undertakings on this case.
 Strong Room	Strong Room	Click on this to view items in your strong room.

Amending Client and Case Details

Updating Client Details

1. **Open** a case in the **Case Diary**.

2. Click on **Current Client Details**

 located on the **Navigation** panel the following window will appear.

Input the following information as required:

- | | |
|-------------------------------|---|
| <p>General</p> | <p>Input/Amend information on the client's name, address, telephone numbers etc.
This screen also has an option to add a client "Warning Message" and "Disallow new Matters".</p> |
| <p>Client Contacts</p> | <p>Click on Client Contacts to add additional client contacts for example the client's spouse or if the client is a company add an employee's details.</p> |
| <p>Notes</p> | <p>Click on the Notes Tab to enter notes relating to the client.</p> |
| <p>Matters</p> | <p>Click on the Matters tab to view a list of all active matters assigned to this client. It will also give the option to set the matter as the Billing Matter for composite billing.</p> |
| <p>Cross Reference</p> | <p>Click on Cross Ref tab to cross reference the client with another for example a husband and wife.</p> |
| <p>Categories</p> | <p>Click on Categories tab to add the client to a category.</p> |
| <p>Corporate</p> | <p>Click on Corporate tab to add the company details e.g. Company Registration Number.
Click on the Personal tab to add the client's personal details for e.g. Date of Birth, Date of Marriage etc.</p> |
| <p>Personal</p> | |
| <p>Legal Details</p> | <p>Click on the Legal Details tab to add the legal details about the client. E.g. Legal Name.</p> |
| <p>Permission</p> | <p>Click on the Permission tab to control access at a client level</p> |
| <p>Billing Details</p> | <p>Click on the Billing Details tab to add information on the billing details of this client.</p> |
3. Click **OK** when complete, to update the record.

Updating Case Details

1. **Open** a case in the **Case Diary**.

2. Click on **Current Case Details**  located on the **Navigation** panel.

3. Input/Amend the following details as required:

Matter

Input/Amend any details relating to the matter description.

Using the drop arrows amend the fee earner, secretary, partner, department, work type.

Input (if applicable) Old Ref, File Ref, Your Reference.

Check the appropriate boxes to mark the case as important, or if monthly statements are required.

Click on the **drop down arrows** to amend the Case Plan, Status and File Colour.

Input the **court record number** if applicable to this case.

Admin

Click on the **Admin tab** to add or amend value to the client amount, the start date, statute date, deposit name and type, amount of budget outlay, the estimate of fees amount and the expected bill date.

Estimate of Fees

Check the box if an estimate of fees has been given.

More Est Fees

Allows user to enter information about issued invoices and expected invoices into the future.

Comments Input any comments and click Show in Alert if it is to be made visible for all users.

Effectively complete: Tick if the case is effectively complete but should not be closed at this time.

Case Associate Click on the **Case Associate tab** to add, view, edit or delete Case Associates.

Input (if applicable) alternative client details such as client name, salutation, address and click on the **Set Override** button to apply it to future documents generated.

Other Details Click on the **Other Details tab** to view a list of user variables eg. Purchase price, secretary reference etc. either already added to the case or due to be added.



Tip: To amend the user variables click on **Extra Case Details** on the Navigation panel.

 **Note** these variables are individual to each case plan type and case.

Archive Remove the **tick** to reopen a previous archived file.

Billing Details Click on the **Billing Details tab** to add information on the billing of this matter.

For Debt cases input the charge arrangements, the debt amount collected, and the total debt amount collected.

Using the option buttons, select the billing type and default billing method. Use the Charge Rate Level option to set the charge rates.

Matter Charge Out Rate will all allow for different charging rates for different Fee Earners who may work on the Matter.

Permissions Click on the **Permissions tab** to control access to this matter, for example to add or remove particular user groups.

Transaction Click on **Defendant** or **Client** tab.
Then click on the **Post Button** to add a transaction.
Click on the **Change Button** to amend an existing transaction.

 **Note** the balance will automatically update.

Linked Cases Click on the **Linked Cases tab** to link two or more cases together.

4. Click **OK** when complete, to update the record.

Inserting a Statute of Limitations Date

1. **Open** a case in the **Case Diary**.
2. Click on **Current Case Details** located on the case Diary shortcut bar.
3. Click on the **Admin Tab**.
4. **Input** a Statute Date or click on the down arrow to select a date from the calendar.
5. **Click OK** to save the changes.
6. The **Statute Date** will now appear as a task in the Case Diary assigned to the case **Fee Earner** and dated **prior** to the actual Statute of Limitations Date for reminder purposes. The number of days warning is set system wide and can be set by a system Administrator. Please see the Admin Manual for details.

C...	A...	P...	D...	A...	Date	Time	Handler	Synopsis	Action	Co...	F...
					21 Feb 2014	17:00	BS	AAA Securities Ltd		PHE	
					06 Feb 2012	10:50	BS	Review File		G16	
					01 Feb 2012	17:43	BS	Invoice No:225		DB01	
					18 Jan 2012	11:13	BS	Invoice No:220		DB01	
					29 Nov 2011	17:04	BS	Phone Call		PHE	

All **Statute of Limitation Dates** can be clearly identified by the Statute of Limitation symbol. . See the following example.

C...	A...	P...	D...	A...	Date	Time	Handler	Synopsis
					04 Jan 2018	09:58	CN	Statute of Limitations Date =04 Apr 2018
					25 May 2016	12:59	CN	Review File

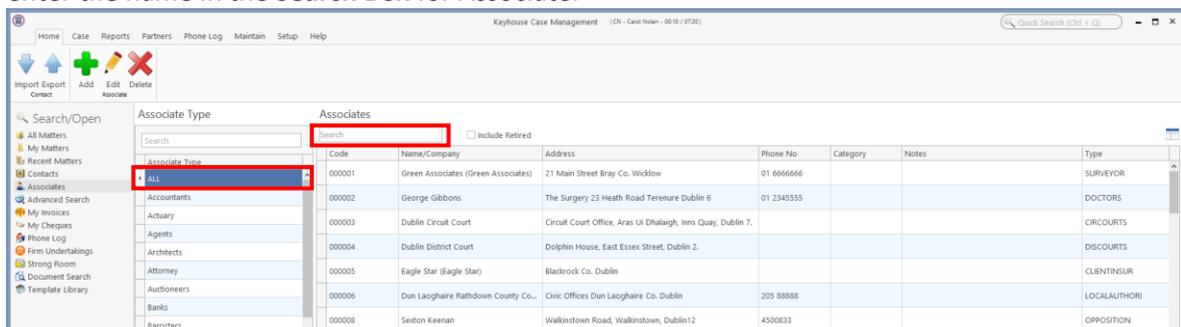
Case Associates

What are Case Associates?

Case Associates are all individuals, companies, government departments, courts etc. connected with a case. For example the solicitor, the barrister, the defendant, the purchaser, the land registry, the lending institution and various others. By adding case associates to a case you can view their details e.g. name, addresses, telephone numbers in the case associate screen. You will also facilitate the generating of letters to case associates for example a “letter to solicitor” will insert the solicitor’s name and address.

Adding a Case Associate

1. Go to **Search/Open** and select **Associates** from the Panel on the left.
2. Before creating a new associate check to see if it already set up. Click on **All** in the **Associate Type** then enter the name in the **Search Box** for Associate.



3. If the Associate is not listed then click the **Green Cross** to add 
4. Input the **relevant** information

Full Name: Input the Full Name

First Name & Surname: These will automatically be inputted from the full name field amend if required.

Salutation: Input the Salutation

Company: Input the company name

Title: Input the title ie. Mr, Mrs etc.

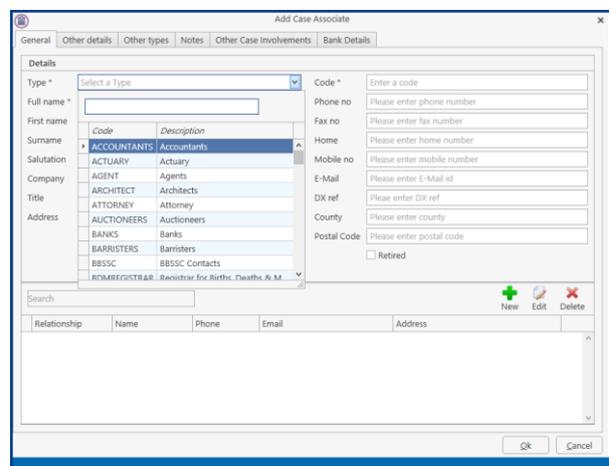
Address: Input the address

Code: Input a Code for this contact e.g. JAC001 for Jackson. If you leave the code blank the system will assign a numeric code.

Phone No: Input the main phone number

Fax No: Input the fax number

Home: Input home phone number



- Mobile:** Input mobile phone number
- E-Mail:** Input e-mail address
- DX Ref:** Input the Document Exchange reference if applicable
- Nominated:** Tick is this is the nominated contact.
- County:** Input the county.
- Post Code:** Input the post code.
- Retired:** Tick the box if a case associate is no longer required to prevent them from being selected.

5. Click **OK**.

 **NOTE:** When adding associate the email address will be checked against the email addresses stored in the system. If it is already in use the following warning will appear.

Case Associate

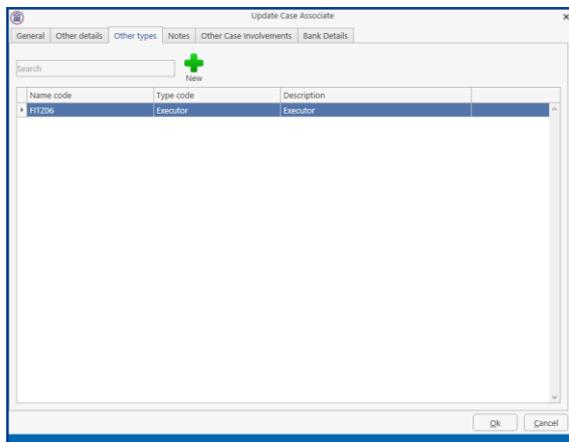
 There is some other associates with the Email ID(dfoster@mayfare.ie). Do you want to select one of them or want to add this associate.

Click List xisting to see the existing associate.

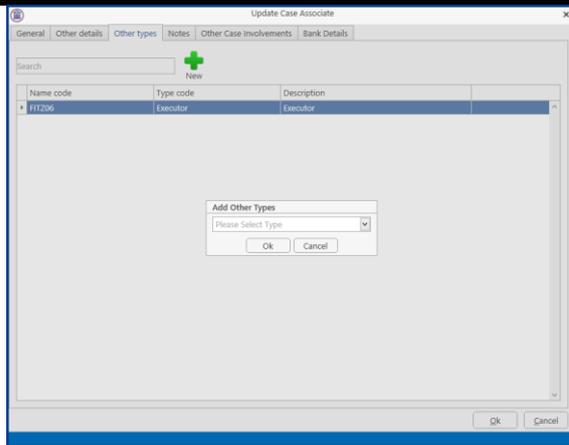
Adding an Associate to Other Types

From time to time an associate may belong to more than one Group e.g. a Beneficiary may also be an Executor of the will.

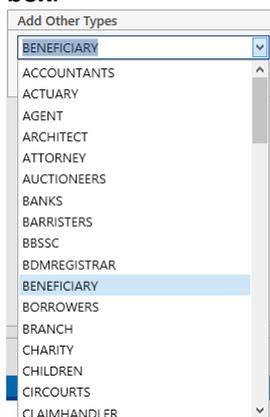
1. Open the existing **Associate** and select **Other type**.



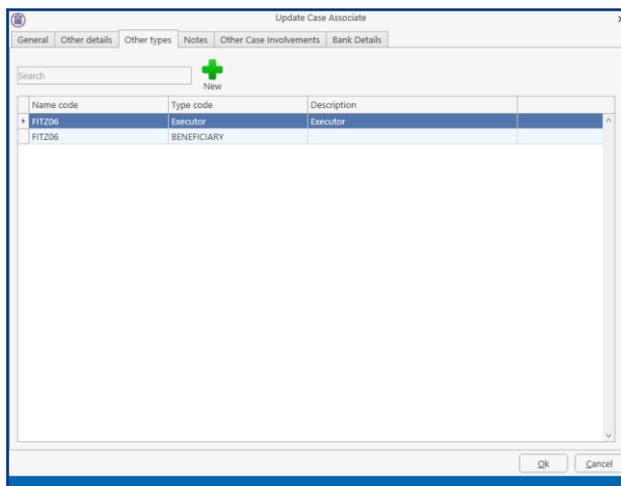
2. Click on the **New** Button and the following screen will appear.



- Click on the drop down arrow to get a **list** of all types available or alternatively **type** into the **Search box**.



- The **Associate** is now available in both groups.



- Click **OK**.

Maintaining unwanted Case Associates

From time to time duplicate Associates may be set up. However, if they are assigned to a matter they cannot be deleted without removing them from the matters. It is possible to retire an associate or merge with an existing associate. This will ensure that your Associate Database is kept accurate and up to date.

Retire a Case Associate

1. Open the **Associate** to be retired.

The screenshot shows the 'Update Case Associate' dialog box with the following details:

- General** tab selected.
- Details** section:
 - Type: Solicitors
 - Code: BOLA02
 - Full name: Boland & Quirke
 - Phone no: 021 277984
 - First name: Enter first name
 - Fax no: 021 277943
 - Surname: Enter surname
 - Home: Please enter home number
 - Salutation: Sirs
 - Mobile no: Please enter mobile number
 - Company: Boland & Quirke
 - E-Mail: Please enter E-Mail id
 - Title: Please enter title
 - DX ref: No DX
 - Address: Solicitors, 72 South Mall, Cork.
 - County: Please enter county
 - Postal Code: Please enter postal code
 - Retired (highlighted with a red box)
- Buttons: New (+), Edit (pencil), Delete (X).
- Table headers: Relationship, Name, Phone, Email, Address.
- Buttons: Ok, Cancel.

2. Tick the **Retired** box and click **OK**. The associate will no longer be available for selection.

Merge Case Associates

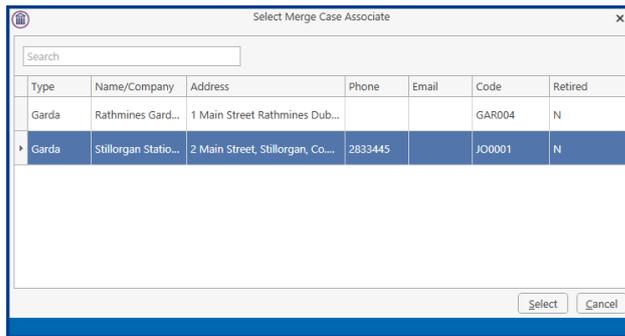
Where a case associate has been duplicated in an Associate Type or where associates may have merged or been taken over, it is possible to merge the associates together.

1. Open the **Associate Type** concerned.

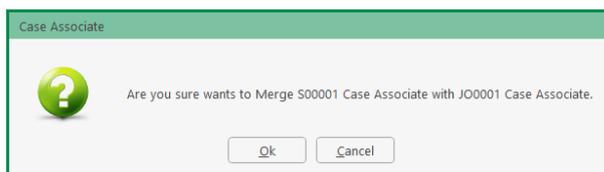
The screenshot shows the 'Associates' table in the Keyhouse Case Management software. The table has the following columns: Code, Name/Company, Address, Phone No, Category, Notes, and Type. Two rows are visible:

Code	Name/Company	Address	Phone No	Category	Notes	Type
100001	Stillorgan Station (Stillorgan Garda S...	2 Main Street, Stillorgan, Co. Dublin	2833445			GARDA
500001	Stepaside Garda Station (Plattinnes...	2 Main Street Stepside Co Dublin	4987777			GARDA

- Right Click on the associate to be merged and select **Merge Case Associate with**. The following Dialog Box will appear.



- Select the associate to be merged to and click **Select**. The following Dialog Box appears, click **OK**.

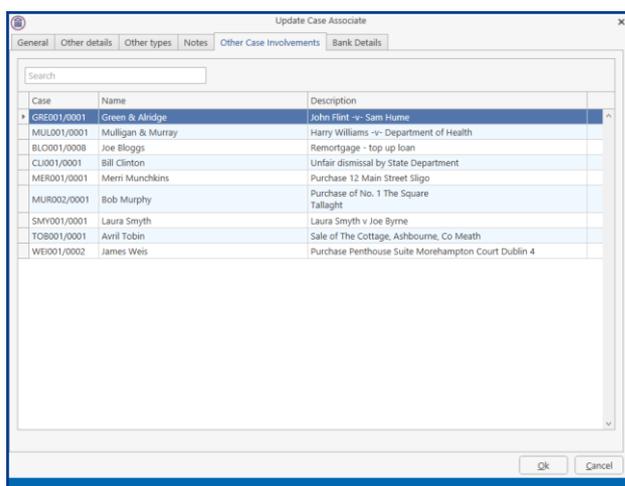


- All matters have now been linked to the merged case associate.

Delete a Case Associate

An associate can only be deleted if there are not matters attached to the associate. To check if an associate has been associated with a matter:

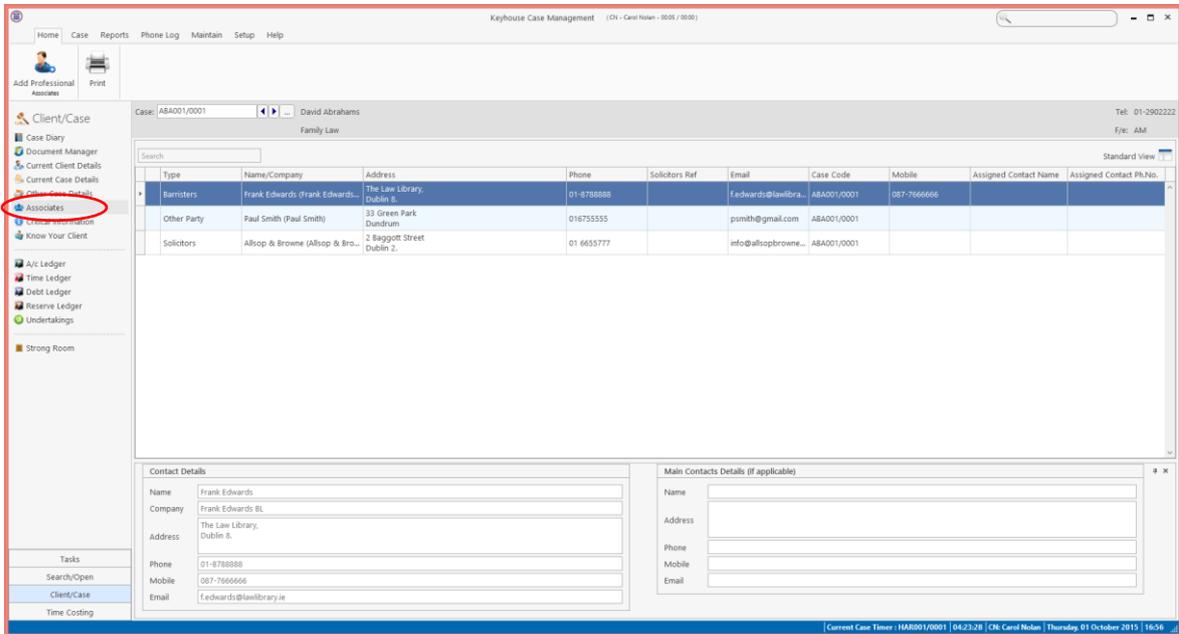
- Open the **Associate** concerned and click on the **Other Case Involvements** Tab.



- A list of all matters associated with the **Associate** will be listed.
- Move **each** matter to an alternative Associate.
- Once all have been moved, right click on the associate and select **Delete**.

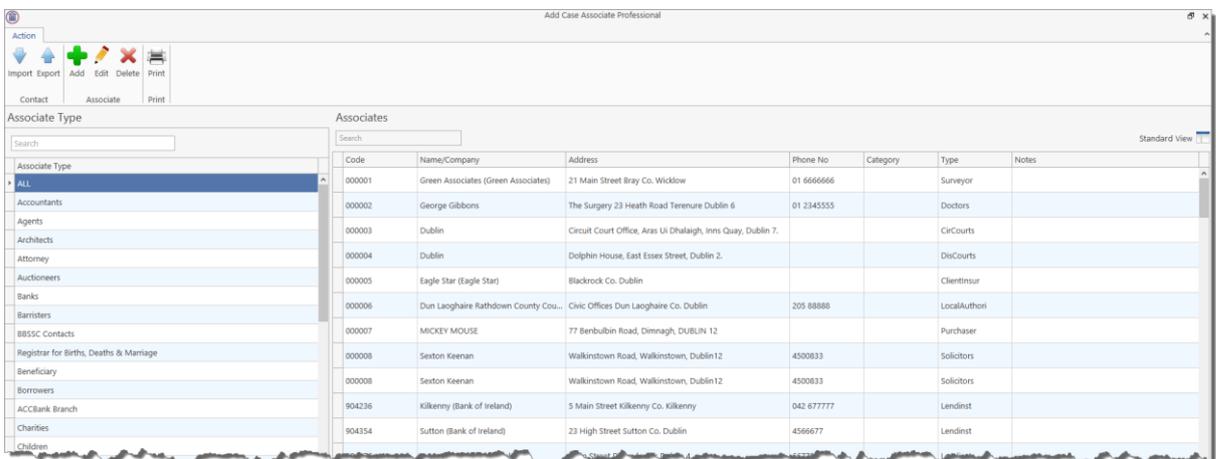
How to add an existing case associate to a case

1. Open a case in the **Case Diary**.

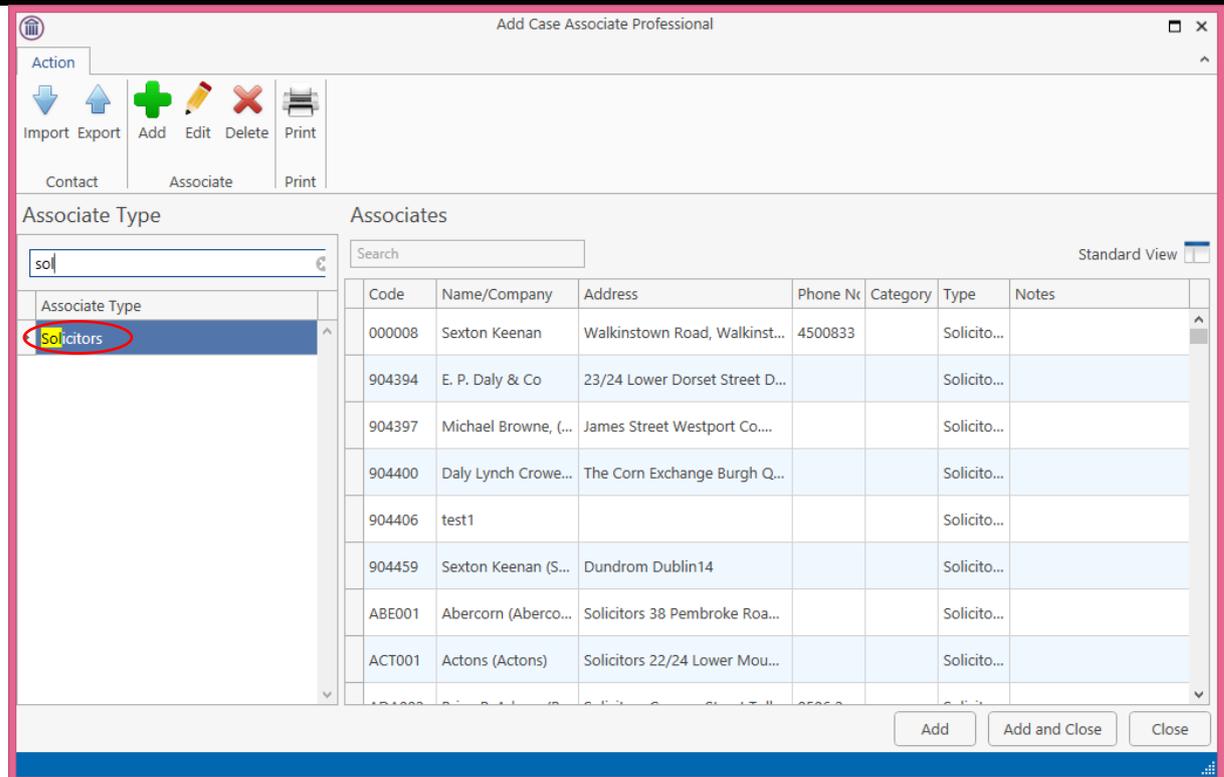


2. Click on **Associates** on the **Navigation** panel: a list of case associates assigned to case will appear.

3. Click on **Add Professional**  located on the **Home** tab of the Ribbon while you are viewing Case Associates. The following dialogue box will appear, listing categories on the left of the screen and entries on the right.



4. Click on the **category** of case associate you want to add, e.g. Solicitors, located on the left of the case associate list. (Circled below).



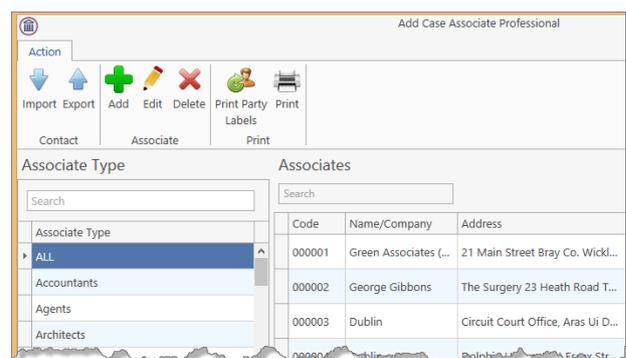
5. Click in the **Search box** and **input** part of the solicitor's name; the search will be applied as you type.
6. Select the solicitor required and click **Add**. Once all the associates are attached, click **Close**.

 **NOTE:** You can also sort the columns by clicking on the column headings in the Case Associate Screen.

How to add a New Case Associate to a Case

1. **Open** a case in the **Case Diary**.
2. Click on **Associates** on the **Navigation** panel
3. Click on **Add Professional**  on the Home tab of the Ribbon.

4. Check the **Category** of case is correct e.g. Bank.
5. Alternatively, click in the **search box** and **input** a key search word the search criteria will be applied as you type.
6. If no record is found then add a new record.



7. Then click on the **green plus**  the following screen will appear.

8. Input the relevant information

Full Name: Input the Full Name

First Name & Surname: These will automatically be inputted from the full name field amend if required.

Salutation: Input the Salutation

Company: Input the company name

Title: Input the title ie. Mr, Mrs etc.

Address: Input the address

Code: Input a Code for this contact e.g. JAC001 for Jackson. If you leave the code blank the system will assign a numeric code.

Phone No: Input the main phone number

Fax No: Input the fax number

Home: Input home phone number

Mobile: Input mobile phone number

E-Mail: Input e-mail address

DX Ref: Input the Document Exchange reference if applicable

Nominated: Tick is this is the nominated contact.

County: Input the county.

Post Code: Input the post code.

Retired: Tick the box if a case associate is no longer required to prevent them from being selected.

The screenshot shows the 'Add Case Associate' dialog box with the 'Details' tab selected. The form contains the following fields and options:

- Type: Banks (dropdown)
- Code: Enter a code
- Full name: Enter full name
- Phone no: Please enter phone number
- First name: Enter first name
- Fax no: Please enter fax number
- Surname: Enter surname
- Home: Please enter home number
- Salutation: Please enter salutation
- Mobile no: Please enter mobile number
- Company: Please enter company
- E-Mail: Please enter E-Mail id
- Title: Please enter title
- DX ref: Please enter DX ref
- Address: Please enter address
- County: Please enter county
- Postal Code: Please enter postal code
- Retired:

Below the form is a search table with columns: Relationship, Name, Phone, Email, Address. There are 'New', 'Edit', and 'Delete' buttons to the right of the table. 'OK' and 'Cancel' buttons are at the bottom right.

9. If you want to add a **Contact** to this associate click on **New**  the following window will appear.

Input the following details as required:

Name
Address,
Salutation
Title
Email
Relationship to the associate,
Phone number
Fax number
Mobile number
Notes

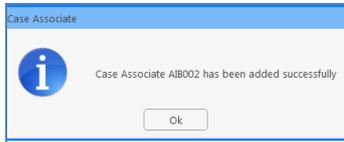
The screenshot shows the 'Add Associate Contact' dialog box. The form contains the following fields and values:

- Associate Code: AIB002
- ID: 8
- Name: Deirdre Nolan
- Address: AIB Sutton Cross Dublin 13
- Salutation: Deirdre
- Phone: 01-8955645
- Title: Ms
- Fax: 01-8955624
- E-Mail: DeirdreNolan@aib.ie
- Mobile: 087-963211
- Relationship: Manager
- Note: Manager of Sutton Cross Branch

'OK' and 'Cancel' buttons are at the bottom right.

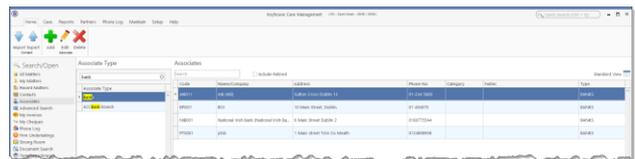
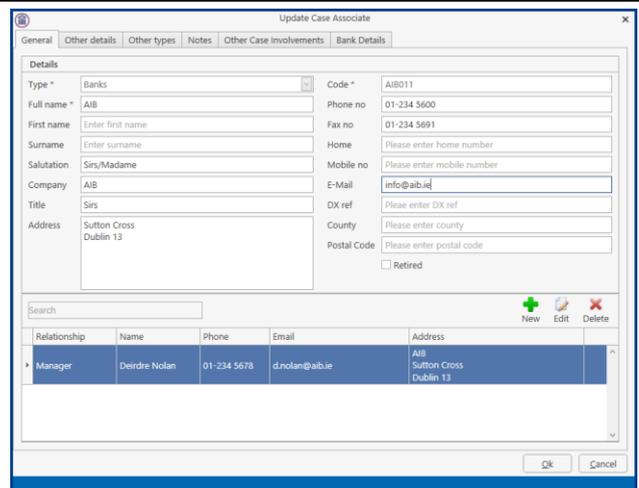
10. Click **OK** to save. You will return then to the **Add Case Associate** window. The contact will then appear at the bottom of the window see the following example.

11. Click **OK** to save the new record. A message will appear stating the contact has been added successfully.



12. Click **OK**. The Case Associate will then appear in the full list.

13. Then **Double click** the new associate from the list to assign to this case. The contact will then be assigned to the case and will appear in the case associate screen of this matter.

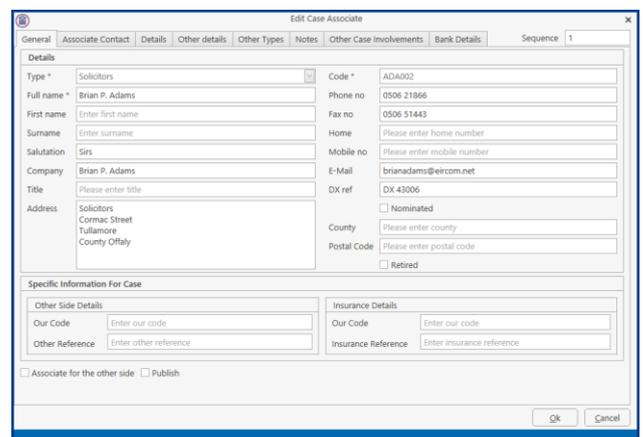


How to amend a Case Associates Details

1. **Open** a case in the **Case Diary**.
2. Click on **Associates** on the **Navigation** panel.
3. If the Associate is assigned to the case **Double Click** to **amend**.
4. Otherwise click on **Add Professional**  on the Home tab of the Ribbon.
5. Click on the **category** of case associate you want to add e.g. Bank.
6. **Search** for the associate you want to amend.

7. Click on the **Edit Tool** ; the following dialogue box will appear.

8. Click on each **tab** and amend the details as required.



General

Click on the **General tab** to amend details such as name, address etc.

Details

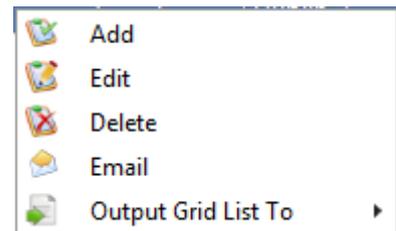
Click on the **Details tab** to add personal information such as date of birth, occupation etc.

Other Types	Click on the Other Types tabs to see if this associate is a member of any other category.
Other Details (optional)	Click on the Other Details tab to add a specific court and court date.
Notes	Click on the Notes tab to add additional notes about the case associate.
Other Case Involvements	Click on the Other Case Involvements tab to view a list of cases this case associate is connected to.

9. Click **OK** to save the amendments.

How to Remove a Case Associate from a Case

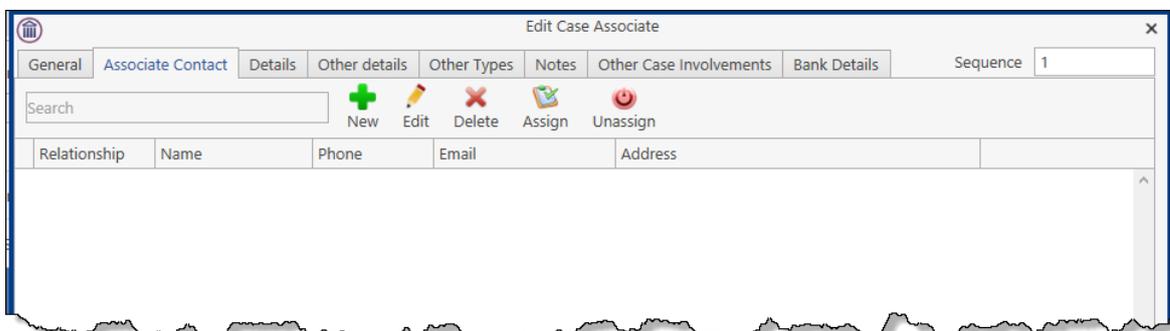
1. **Open** a case in the **Case Diary**.
2. Click on **Associates** on the **Navigation** panel.
3. Right Click on the Associate to be removed. The following menu will appear.
4. Click on the **Delete** to remove it from the case.



NOTE: To delete a case associate completely first remove it from all cases and then delete it from the case associate database. It is not possible to delete a case associate while it is assigned to any case.

How to add a Contact to a Case Associate

1. Open the required Associate in the Case.
2. Select the Associate Contact Tab and click on the Green Cross 



- Enter the required information and click OK. As the address of the Associate is already in the system it is not necessary to re-enter it on this screen.

- To **assign** the Contact to the case click the  button.

Print Options

The following Print options are available on the Home tab of the Ribbon:



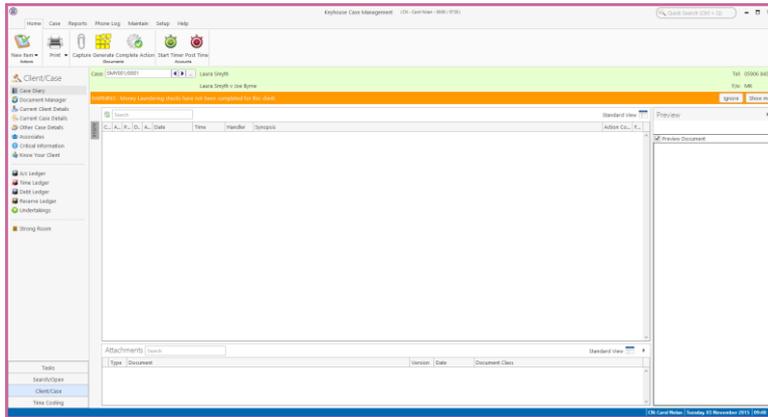
Click on **Print** to print a report of Case Associates on the Case.

Generating Tasks

Each case has a specific case plan assigned to it when it is set up. Each Case Plan is made up of a series of Tasks; these tasks will often have attached documents, which will be processed when a task is generated. When a task is completed a follow-up task maybe inserted in the Case Diary for processing in the future. These tasks will then appear in the user's to do list on a specific date as a reminder to be processed.

How to Generate a Task

1. Open a case in the Case Diary



2. To view the case plan move your mouse over **Action** located to left of the Case Diary Screen the Case Plan will appear.

3. Click on the **Pin**  to make it permanently visible.

 **Tip:** For further information on showing the case plan see the section on configuring the case diary screen.

4. **Generate** the Task using one of the following methods:

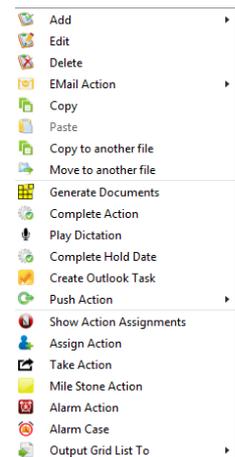
Method 1: **Double Click** the task you want to generate from the list of tasks in the case plan.

Method 2: If the task is already in the case diary

- 1) Click on the task to select it.
- 2) Click on **Generate**  on the case diary toolbar.

Or

- 1) **Right click** on the task
- 2) Select **Generate Documents** from the pop-up menu.



To Complete A Task

Once a task is finished, it must be completed on the system. There are two ways to do this.

Method 1: Click on **Complete Action** button on the Ribbon. 

Or

Method 2: **Right Click** on the action. This will allow you to complete the action using different dates if needed.

- 1) Click on **Complete Action** to complete the action with today's date

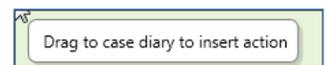
- 2) Click on **Complete Hold Date** to complete the action with the same date as it was generated.

NOTE: If documents are to be Read Only once completed, ensure the Read Only Documents On Completion Actions option is ticked Administration Options. See the Administration Section of the New Framework Admin Manual.

Working with Tasks in the Case Diary

How to Insert Tasks in the Case Diary

1. To insert a task into the diary, **Click and Drag** the task from the Workflow to the case diary window. The following will appear as you drag it.
2. **Double Click** the Task and change the date for processing, the subject etc., as required
3. Click **OK**.

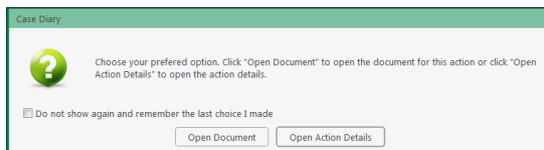


Changing Tasks

At times you may want to amend the details of a task. For instance you may want to amend the description, date, properties etc.

1. **Double click** the task you want to amend and the following dialogue box will appear.

The following message will appear; click on **open action details**.



2. **Amend** the following details as required
 - a. On the **General Tab** amend the following details:

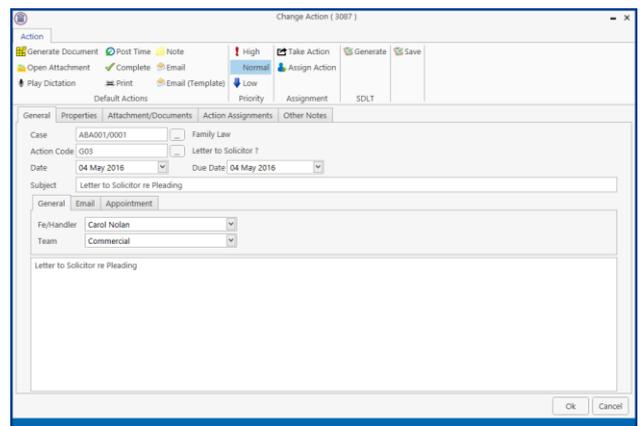
Case: This will default to the current case; to change click on the  button and select the required case.

Action Code: This will default to the **current action code**.

Date: You can amend the date of task if required. Click on the down arrow to reveal a calendar. Click on the required date.

Due Date: Click on the **down arrow** to reveal a calendar click on the required due date.

Subject: Click in the subject box and **amend** as required.



F/e Handler: Click on the drop arrow to select a handler; it will default to the current handler.

Team: Click on the drop down arrow to select a team; it will default to the selected handler's team.

b. Click on the **Properties** tab to reveal the following screen. **Amend** the following details as required:

Action Status: Click drop down and click on the status of the case when this task is complete. E.g. Pre-Proceedings, Proceedings issued.

Publish: This applies only to data that is published to an external source. Using the option buttons **set** as required.

Publish Status: This applies only to data that is published to an external source. A **tick** will appear stating a communication has been sent.

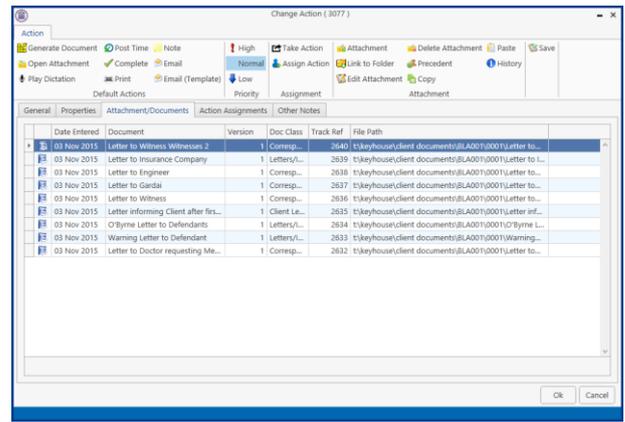
Priority: **Select** the appropriate priority status.

Other Properties: A check will appear in the relevant box if the action is a **Milestone** action, if it has been **Completed**, if it is designated as **Billable** or if the associated documents have been processed. The boxes may be checked and unchecked as required, e.g. to “uncomplete” an action, so that it can be deleted. Tick the Know Your Client to ensure the action is visible on a Know Your Client Screen.

Category: Using the **option buttons** amend the action category if required.

- c. Click on the **Attachment/Documents** tab to reveal the following screen. A list of documents processed on this task will appear.

The following actions can be performed in this window



NOTE: If you just want to view/edit a document only, this can be done by clicking on the Attachment Button at the bottom of the screen

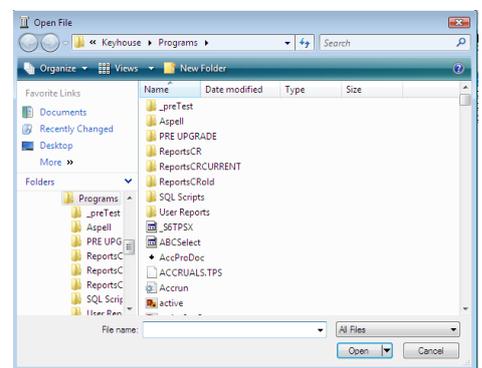
Type	Document Name	Diary Date	Version	Date	Document Class	Source
	Letter to Witness Witnesses 2	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
	Letter to Insurance Company	03 Nov 2015	1	03 Nov 2015	Letters/Interparty Corr...	Case
	Letter to Engineer	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
	Letter to Gardai	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
	Letter to Witness	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
	Letter informing Client after first consultation	03 Nov 2015	1	03 Nov 2015	Client Letters	Case
	O'Byrne Letter to Defendants	03 Nov 2015	1	03 Nov 2015	Letters/Interparty Corr...	Case
	Warning Letter to Defendant	03 Nov 2015	1	03 Nov 2015	Letters/Interparty Corr...	Case
	Letter to Doctor requesting Medical Report	03 Nov 2015	1	03 Nov 2015	Correspondance	Case

Open an attachment

- i. **Double Click** on the attachment you want to open.
- ii. Or Click on **Open Attachment**
- iii. The Word Document will then open in Word to edit, print etc.

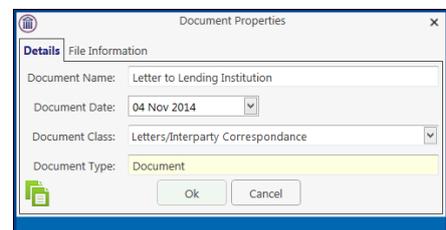
Add an attachment to a task

- i. Click to the **Attachment/Documents** Tab
- ii. Click on the **Attachment** option. The following dialogue box will appear.
- iii. **Browse** and locate the required document.
- iv. Click **OK**. The document will now appear the attachment list.



Amend an attachments properties

- i. **Select** the document you want to amend.



ii. Click on the **edit attachment**  located on the toolbar. The following dialogue box will appear.

iii. **Amend** the following details as required

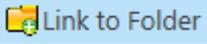
Document Name Click in the input box and amend as required.

Class/Category Click on the drop down arrow for a list of document classes, and select the required category, e.g. Letter, Pleadings, Inter-Party Correspondence etc.

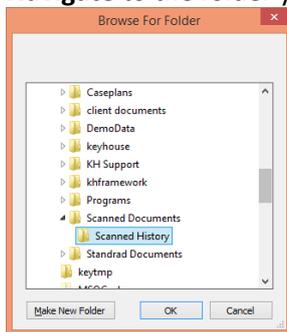
iv. Click **OK** to save the changes.

Link to Folder

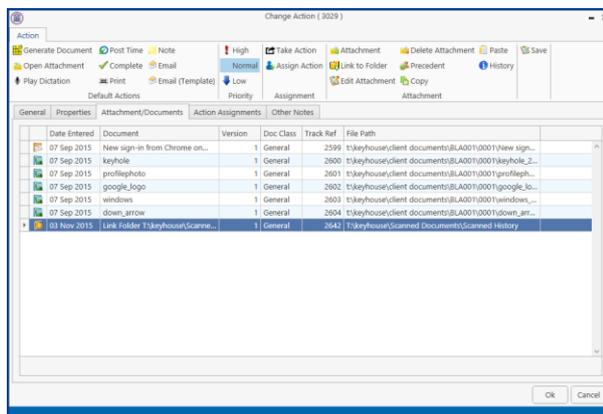
i. Click to the **Attachment/ Documents** Tab.

ii. Click on the **Link to Folder** button. 

iii. **Navigate** to the folder you want to attach.



iv. Click **OK**.



v. The link to the location is now available in the Attachment and also visible in the **Document Manager**.

Delete an attachment

- i. **Select** the attachment you want to delete.

- ii. Click on **delete attachment**. 

- iii. Click **OK** to confirm the deletion.

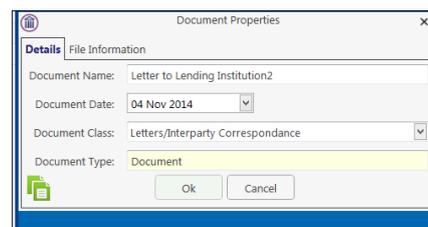
Copy and Paste an attachment

- i. Select the attachment you want to copy.

- ii. Click on **Copy**. 

- iii. Open the task you want to **Paste** the document in. Click on the Attachment/Documents Tab.

- iv. Click **Paste** . The following attachment properties box will appear.



- v. Amend the details as required and OK to confirm.

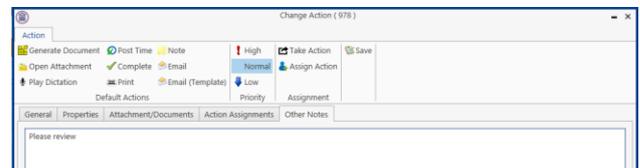
- vi. A **message** will appear asking you to confirm the update, click **Yes** to confirm

- vii. A copy of the document will then appear in the document list.

By	Action	For	Date Assigned	Time Assigned	Date Returned	Time Returned	Assigned By	Returned By	Delegate	Team
Brian Sweeney(BS)	Processed	Brian Sweeney(BS)	12 Feb 2014	10:05		23:59	BS	BS	BS	COM
Brian Sweeney(BS)	Processed	Brian Sweeney(BS)	21 Jan 2014	14:34		23:59	BS	BS	BS	COM
Brian Sweeney(BS)	Completed	Brian Sweeney(BS)	18 Jan 2012	11:10	31 Jan 2012	09:37	BS	BS	BS	COM
Brian Sweeney(BS)	Completed	Brian Sweeney(BS)	06 May 2011	11:10		23:59	BS	BS	BS	LIT
Brian Sweeney(BS)	Processed	Brian Sweeney(BS)	06 May 2011	11:10		23:59	BS	BS	BS	COM
Brian Sweeney(BS)	Created	Brian Sweeney(BS)	04 Mar 2015	10:11	06 May 2011	11:10	BS	BS	BS	LIT

- d. Click on the **Action Assignments** tab to show the assignment history of the task. See the section on Assigning Tasks for further information.

- e. Click on the **Other Notes** tab; the following screen will appear. Input any notes you may have on the task.



3. Click **OK** to save any changes made.

Deleting a Task

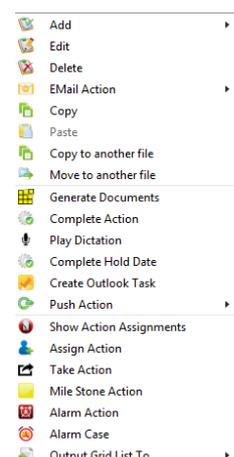
1. **Right Click** on the **task** in the **case diary** the following menu will appear.

2. Click on **Delete**. 

3. You will be asked to confirm the deletion. Click **Yes**. If the task has been generated you will be asked if you want to delete the documents generated. If you click the **Yes** button, the documents will be deleted.

Copying a Task

1. **Right Click** on the **task** in the **case diary**: the menu above will appear.

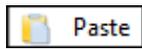


2. Click on **Copy**.



3. Then **Right Click** again in the case diary: the menu above will appear.

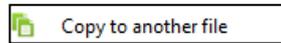
4. Click on Paste.



Copying a Task to another matter

1. **Right Click** on the **task** in the **case diary**: the menu above will appear.

2. Click on **Copy to another matter**.



3. A list of cases will appear search for the required case.

4. Then **Double click** to select.

NOTE: You will automatically move to the case diary of the case selected.

Moving a Task to another matter

1. **Right Click** on the **task** in the **case diary**: the menu above will appear.

2. Click on **Move to another matter**.



3. A list of cases will appear search for the required case.

4. Then **Double click** to select.

NOTE: You will automatically move to the case diary of the case selected.



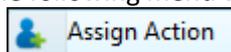
TIP: TO DELETE, MOVE OR COPY MULTIPLE TASKS :

- In the Case Diary click on the first task.
- Press CTRL on your keyboard and click on each of the other tasks.
- Then Right click to the reveal the menu above and proceed as instructed above.

Assigning a Task to Another Handler

1. **Right click** on a task the following menu will appear.

2. Click on **Assign Action**.

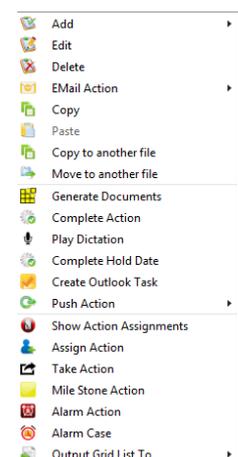


3. A screen will appear listing all **resources**.

4. Double Click on the **resource** person you want to assign the task.

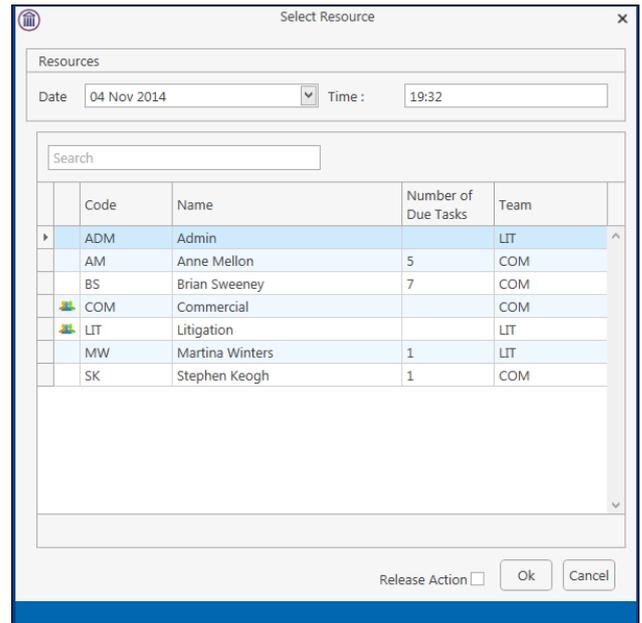
5. Check the **Release Action** box to remove the task completely from your task list.

Alternatively to continue to **own** the task leave the **Release Action** box checked.



Note The owner of the task is the only person who can mark the task as complete. This allows you to assign a task to another handler but ensures you have control over the task.

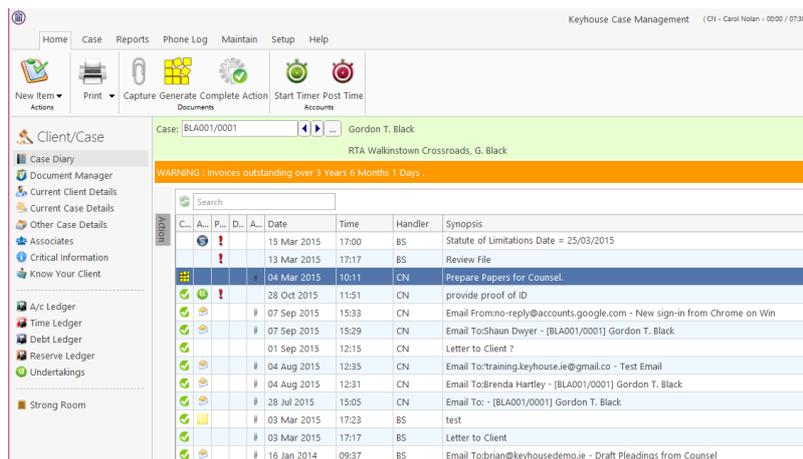
6. You will return to the **action assignment** window.
7. Click **OK** to save the changes.



Searching, Sorting and Filtering the Case Diary

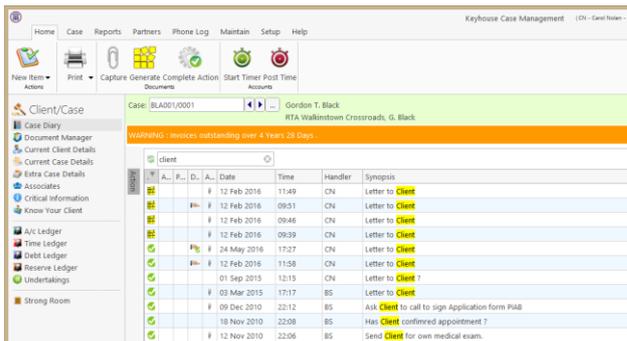
How to Search the Case Diary

1. Open a case in the Case Diary.
2. **Click** in the Search box.



3. **Input** the key search words, the search criteria will be applied as you type.

- All tasks containing the **search criteria** will be displayed in the case diary below. See the example below of a search for “client”.



- Click **cancel**  to reset.



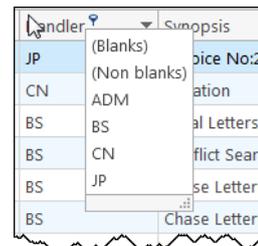
Tip to refresh the Case Diary click on refresh tool  located next to the search box on the search bar.

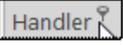
How to sort and filter the Case Diary Columns

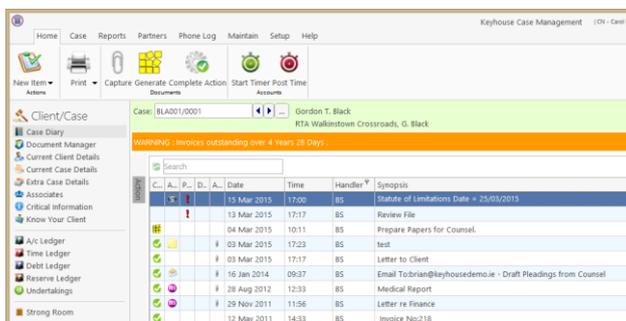
- Open a case in the **Case Diary**.
- Click on the required **column heading** to sort by that column.

How to filter Case Diary Columns

- Open a case in the **Case Diary**.
- Move your mouse to the required **column heading**.

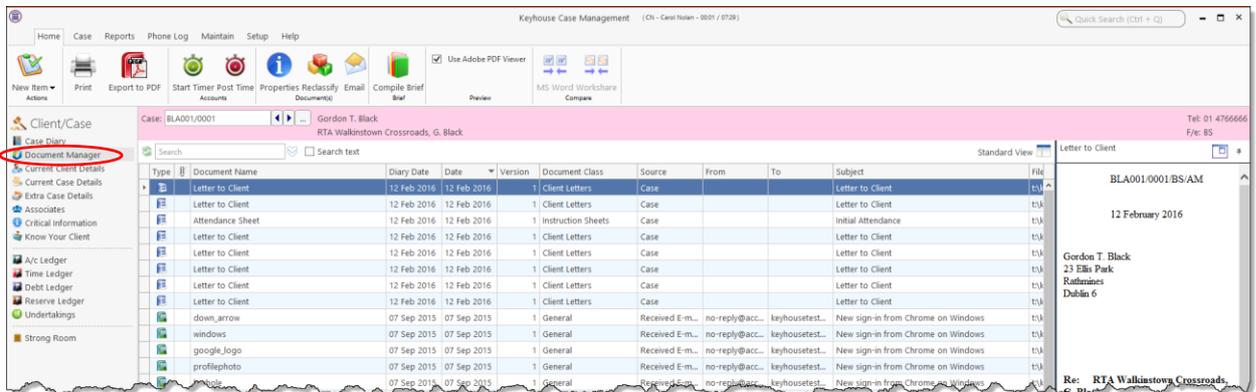


- To view a list of **filter** categories  click on the pin and select the required category. See the following example.



How to view all documents on a case

1. Open a case in the case diary.
2. Then click on **Document Manager** in the navigation bar. The following screen will appear listing all attachments on the case.



How to search for a document on a case

1. Click on **Document Manager** in the navigation bar.
2. **Input** the key search words in the **Search box** provided the search criteria will be applied as you type.
3. A **list** of documents containing that word will appear.



4. **Click** on a document to view in the preview pane.
5. **Double click** to the open the document.

NOTE: For information on the Document Manager see Chapter 16.

Processing Documents

When a task is generated any precedents connected with the task are processed. Depending on how the documents have been set up, different requests are made of the user.

Precedent Documents usually contain codes which prompt the user for specific information needed in that document.

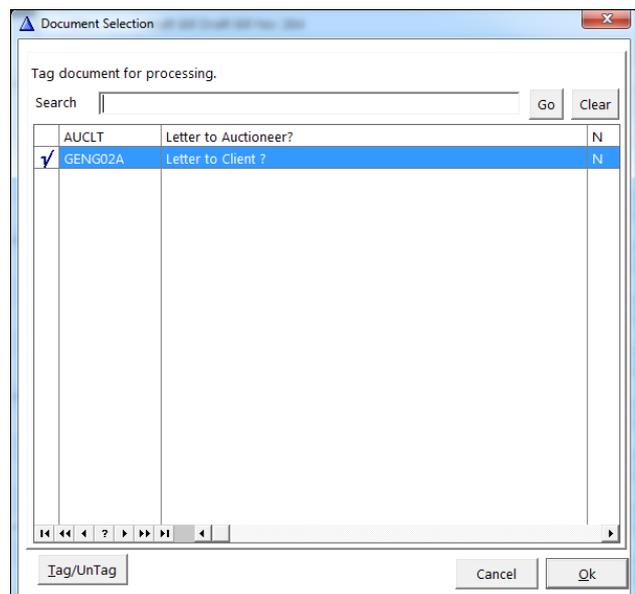
What type of information is requested when processing documents?

1. You may be asked to select the documents you want to process.
2. You may be asked to name the document.
3. You may be asked to add case associates to the case.
4. You may be asked to answer specific questions pertaining to a particular document

Select Documents to be processed

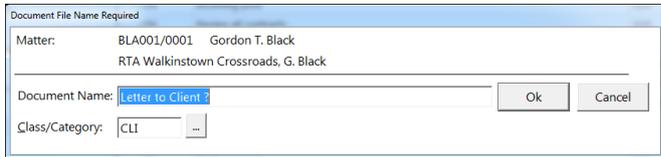
Some documents are optional. Users are given the choice to select the documents they want to process. The following will occur:

1. A **Document Selection** dialogue box will appear.
2. **Tag** the documents you want to process by putting a tick next to each document that is to be generated.
3. Click **OK** and the documents tagged will be generated.



Naming and classifying a Document

Some documents may request the user to input a name. If this is the case the following will occur.

1. The following dialogue box will appear requesting the user to input a document name. **Input** an appropriate name.
- 
2. To classify a document click the  **button** and select a document class e.g. Pleadings.
 3. Click **OK**.
 4. The system may pause and request information, for example, Case Associates or specific questions pertaining to the document.
 5. The documents will then be created and displayed in Word ready for printing etc. The documents are saved and stored in the Keyhouse system.

Adding Case Associates when generating a document

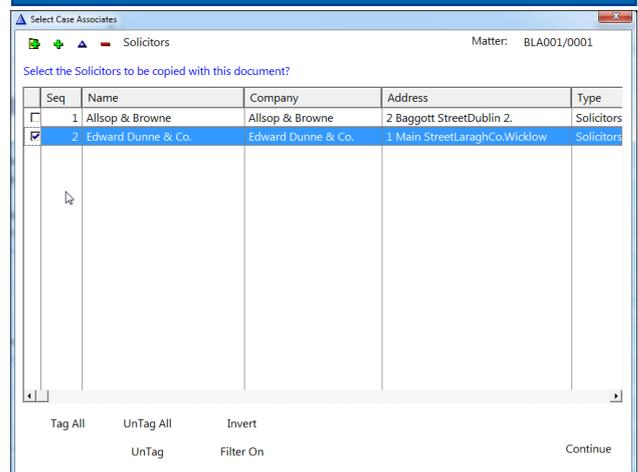
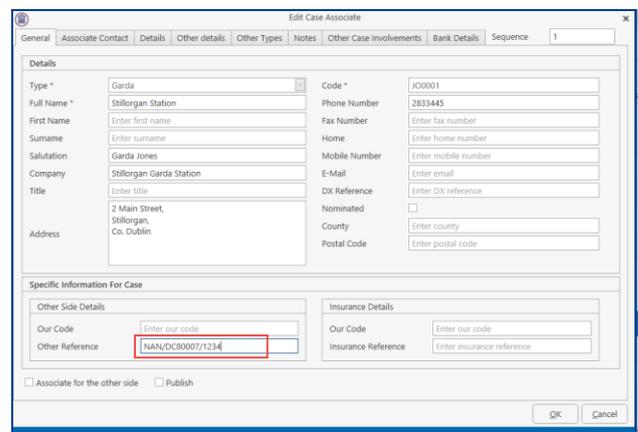
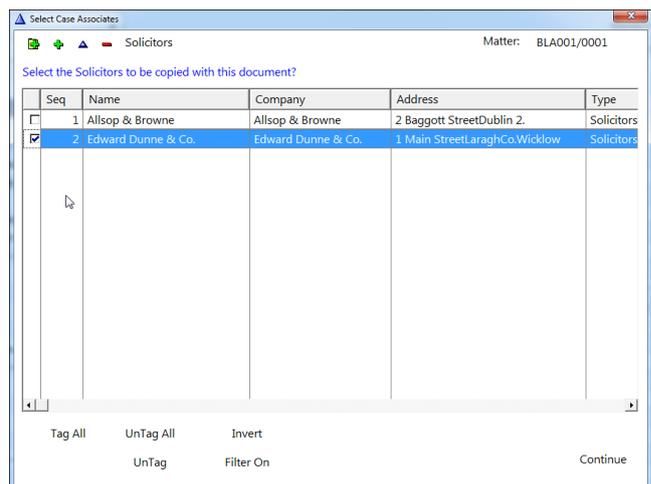
When processing a document you may be asked to add case associates or professionals to a case. Once they are added they are visible in the Case Associates section of the Case Diary.

Example 1: Letter to Solicitor- Searching and Selecting an existing case associate

In the following example the case associate is a solicitor and the document being processed is a letter to solicitor.

- The following dialogue box has appeared requesting the user to select a Solicitor for this letter.
- There is two solicitors assigned to this case, you can tag the solicitor provided then click on the **amend** button  to add a reference.
- Input** the other side's reference in "Other Ref" (circled in red, right)
- Or if the solicitor displayed is not the solicitor you want to write to click on the **green plus with the yellow folder**  and add the new case associate as previous outlined in the section on "How to Add a new Case Associate".
- A screen will reappear listing the solicitors on the case.
- Check the appropriate box(es) to **tag** the required solicitor(s).

 **Note** If you tag two solicitors two documents will be generated.
- Click **Continue**.
- Word will open displaying the letter to solicitor.
- Edit** the document in Word as normal as required.
- Save** any changes and **Print** as required.
- The action/task and document will then be present in the **Case Diary** for future review.



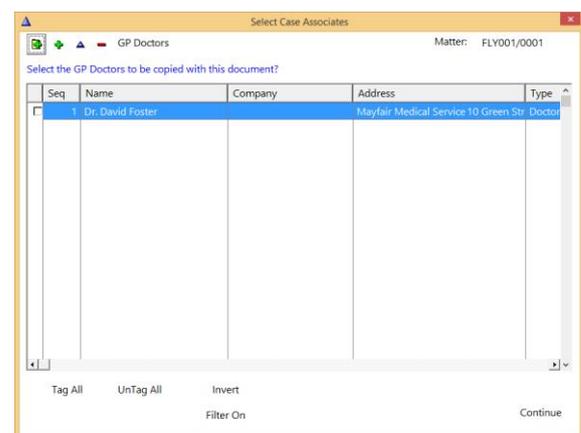
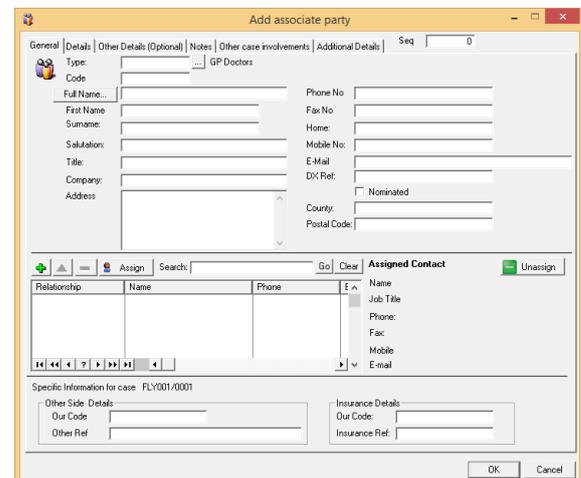
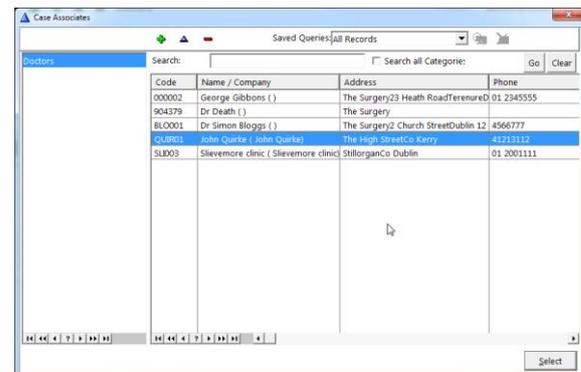
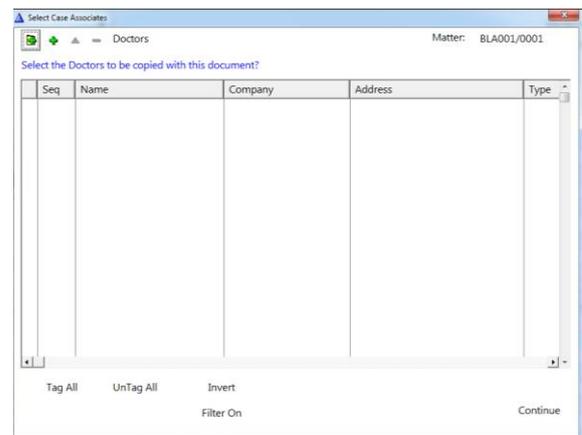
Example 2: Letter to Doctor – Setting up a new case associate

In the following example the document being processed is a letter to Doctor, the Doctor is not present in the case associates so he needs to be added to the list of doctors and assigned to the case.

1. The following dialogue box has appeared requesting the user to select a Doctor for this letter.
2. No doctors have been assigned to this case so the user needs to add one.
3. Click on the **Green Plus with the yellow folder**  and the following screen will appear.
4. Highlight for the doctor required and click Select . If the doctor your require is not in the list then click Green Plus 

 **Remember** to always perform a search to ensure the case associate is not already on the system.

5. Complete the screen with all relevant information and click OK
6. The doctor will now be visible in the list.
7. Highlight the doctor and click Select . The following screen will reappear listing the doctor assigned to the case.
8. Using the tick boxes provided **tag** the required Doctor and click **Continue**.
9. Word will open showing the letter to doctor
10. **Edit** the document in Word as normal as required.
11. **Save** any changes and **Print** as required.
12. The task and document will then be available in the Keyhouse Case Diary for further review.



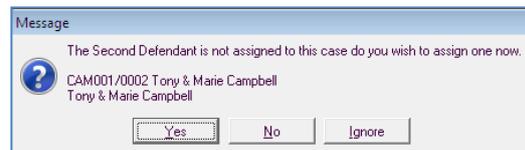
Example 3: Letter to Lending Institution – Where there is only one lending institution and it is already present in the case associates.

In the following example the case associate is a Lending Institution and the document being processed is a letter to Lending Institution. The template document has been setup to insert information on the first lending institution.

1. Word opens automatically displaying a letter to lending institution the information regarding the case and case associate i.e. the lending institution is inserted automatically. No information is requested as it is already been added to the case associates.
2. **Edit** the document in Word as normal if required.
3. **Save** any changes and **Print** as required.
4. The action/task and document will then be present in the Keyhouse Case Diary for future review.

Example 4: Warning Letter – Where the precedent document has been set up to ask for information specifically on the 2nd Defendant.

1. The following message box has appeared requesting the user to add a **Second Defendant** to the case.



To add a Second Defendant click **Yes** and add the case associate as normal then select and add them to the case. (See the previous examples for further information)

Or

Click **No** if you do not have the information at this time and want to be asked again in the future. In this case any future actions/tasks generated will pause and request this information again.

Or

Click **Ignore** if you do not have a second defendant on this case and do not want to add one in the future. In this case all future actions/tasks generated will not request this information.

2. Word opens automatically displaying the warning letter, the information regarding the case and case associate is inserted.
3. **Edit, Save** and **Print** in Word as normal.
4. The action/task and document will then be present in the **Case Diary** for future review.

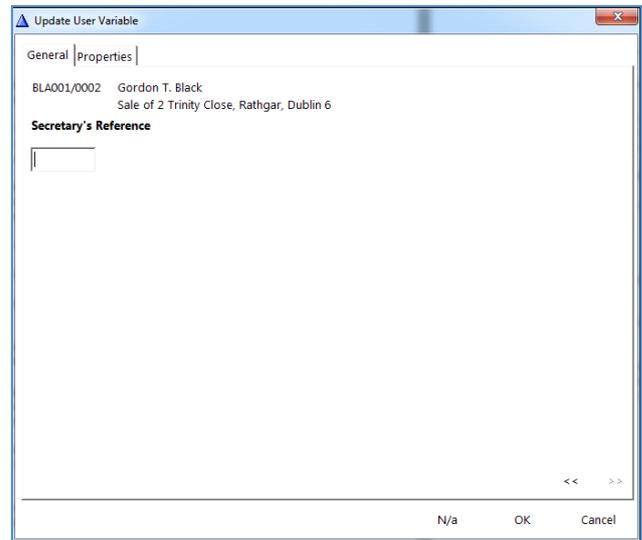
Answering UDF Questions

When generating a document, a user will often be asked specific questions pertaining to that document. For example a prompt might ask the user what is the purchase price of the property.

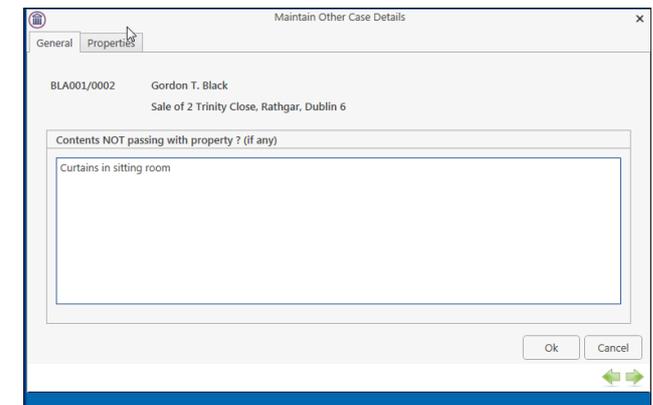
Example of UDF Question: Sale Price of Property

1. **Input** the answer in the input box provided.
2. Click **OK**.
3. If the question is not applicable click **N/A**.
4. The answer is then inserted in the Word document.
5. The answer will be stored in the **extra case details screen**.
6. To amend click on the extra case details shortcut  available on the case diary navigation panel. The following screen will appear.

To edit **Double click** on an item, make your amendments and click **Ok** to save them. The next time any document containing this field is generated, it will include the amended answer.




Detail	Value
Do the contents of the property pass with the terms of any?	None
Contents NOT passing with property ? (if any)	None
Sale Price of property (e.g. 100,000.00)	200,000.00
Deposit amount in full (e.g. 10,000.00)	20,000.00
Description of the property for the Contract	in the property located in Folio 1234F

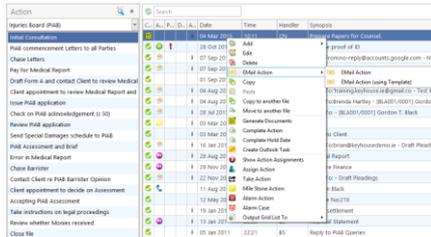


Generating an Email without an Attachment using the Email Template

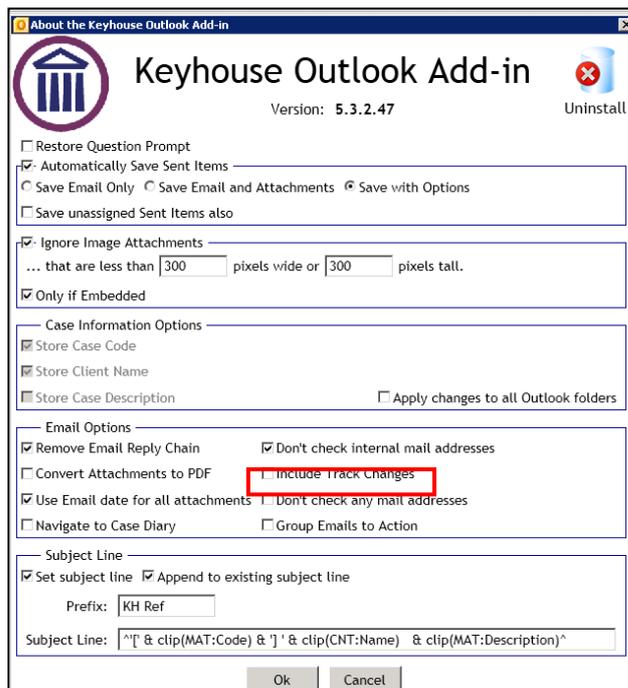
1. Double click on the **action** to generate it.
2. This will take you to **Outlook**. The email can then be edited and sent in the normal way.
3. Return to Keyhouse and **complete** the action in the normal way. See **Marking a Task as Complete** (p. 64) for further information.

Generating an Email with an Attachment using the Email Template

1. Double click on the **action** to generate it.
2. **Process** the document in the normal way.
3. Once the document has been generated and edited, close it and return to Keyhouse.
4. Right click on the action in the **Case Diary** and select **E-Mail Action**. Then select **E-Mail Action (using Template)**.



5. The email will generate in **Outlook** with the Attachment. The email can then be edited and send as normal.
6. Return to Keyhouse and complete the action. See **Marking a Task as Complete** (p. 64) for further information.
7. The email and the attachment will appear as individual actions in the case diary.
8. If you want them to appear as a single items in the Case Diary go to the About Button in Outlook and tick the Group Emails to Action.



Working with Documents already processed

Marking a Task as Complete

Tasks after being generated  should be marked as complete to reflect this. Otherwise the task will appear incomplete in your to-do list, the case diary and case diary reports. When a task is marked complete, follow-up actions may be inserted in the case diary. The Case Diary lists outstanding and completed tasks in date order reflecting the progress of the case.

1. Click on the Task in the Case Diary.

2. Click on **Complete Action**  available on the Home tab of the Ribbon. A tick on a green disc will be shown beside the task/action, indicating that it is complete.

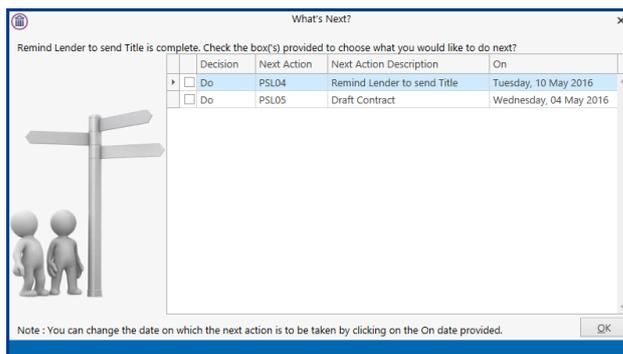
			24 Apr 2010	13:55	BS	Letter to Land Registry
---	--	---	-------------	-------	----	-------------------------

-  **NOTE:** The owner of the task is the only person who can mark the task as complete. This allows you to assign a task to another handler but ensures you have ultimate control over it.

If you mark an action as complete any precedents which have not yet been generated will automatically generate.

3. A Follow-up action is the next task that needs be processed in this case. This is setup by the administrator when the case plan is created. Any follow-up actions setup to be **“automatically processed”** will be inserted in the case diary automatically.

Or



If the follow-up action has been setup to **“ask the user which action to process”** the user will be given a choice to insert in the case diary. The following dialogue box appears **tick the next task** and click **OK**. The task/s will appear in the case diary.

-  **NOTE:** The setup of this section is controlled by your administrator. Contact him/her regarding setup and timelines.

Opening Documents Generated

1. In the case diary click on the **task** containing the documents. See the following example

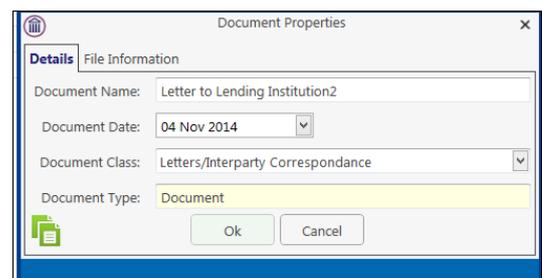
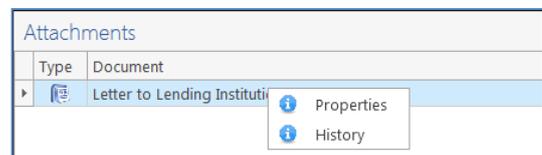
The screenshot shows the Keyhouse Case Management software interface. The main window displays a case diary for case BLA001/0001, handled by Gordon T. Black. The diary lists various tasks with columns for Date, Time, Handler, Synopsis, and Action. A warning banner at the top indicates 'Invoices outstanding over 3 Years 8 Months 19 Days'. On the right, a preview window is open for a document titled 'Warning Letter to Defendant' (BLA001/0001/BS), showing the document's content, including a letterhead and a body of text.

2. **Double Click** on the document in the attachment window. Word will launch and open the document.

 Tip to preview a precedent document click on **search/open** on the navigation bar. Then click on **template library** then search for the precedent required. See the chapter on Search and Open for further details.

Changing the Name and Class of a Generated Document

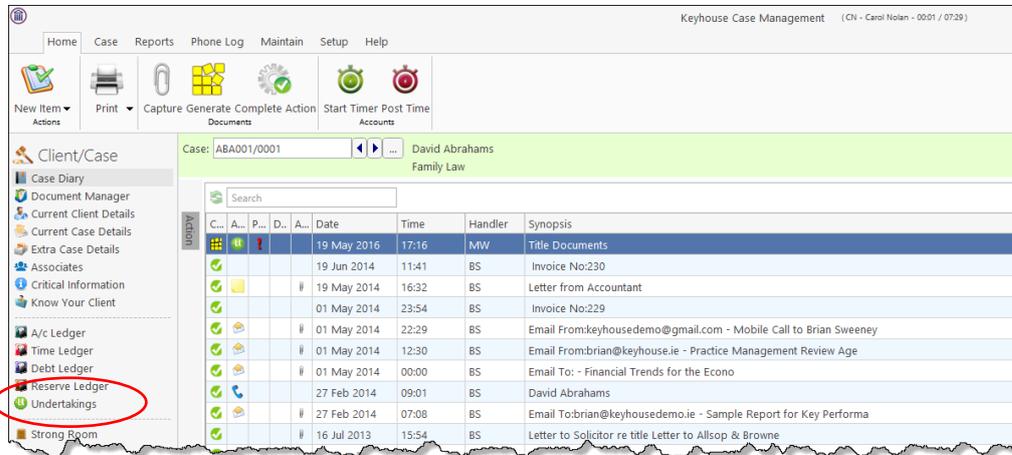
1. From the Attachment pane in the case diary. **Right Click** on the **Document**; the following menu will appear.
2. **Click on** properties and the following dialogue box will appear.
3. **Amend** the document name and class as required.
4. Click **OK** when complete.
5. A **message** will appear asking you to confirm the update, click **Yes** to confirm.



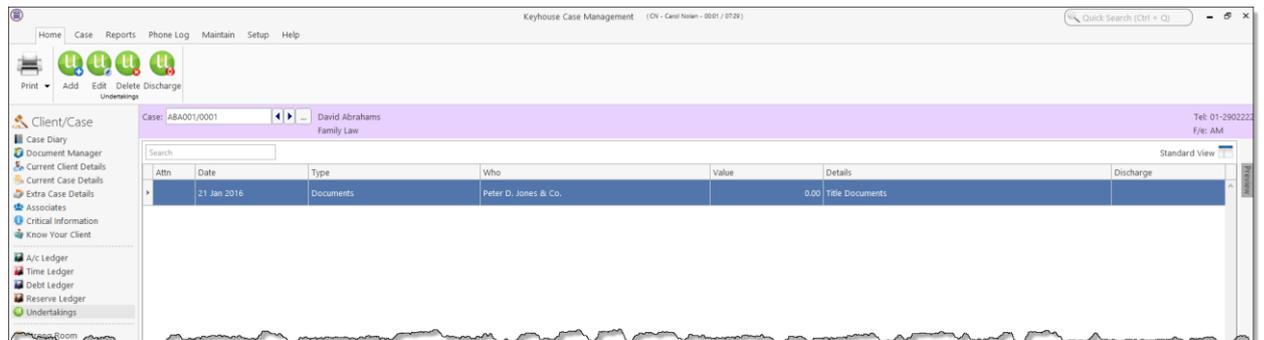
Undertakings

Viewing Undertakings

1. Open a case in the **Case Diary**.
2. Click on **Undertakings** (circled in blue below) to see all undertakings on this case.



3. Any **Undertakings** in the case will be displayed.



4. Double click on an entry to edit it or select the entry and click on the **edit tool** on the Home tab.

Adding and Viewing an Undertaking

1. Go to the **Undertaking** screen.
2. Click on the **Add tool** on the Home tab and the following screen will appear:

3. Input the following Information

Comment to Ledger: Using the tick box provided tick if you want a comment added to the ledger

Needs Attention: Tick if it needs to be action.

Date: This is actual date of the undertaking. Click the  button to select a date from the calendar.

Diary Warning Date: This is the date the Undertaking Action will appear on the Fee Earners Task List as a To Do Item. This will default to a system warning date to amend click on the **down arrow** to view a calendar and select a date.

Type: Check the appropriate button for the type of undertaking i.e. **Financial** or **Documents**.

Given or Received: Select whether the undertaking has been **given** by you or **received** by you.

Commercial: Select whether the undertaking is **commercial** or **non-commercial**

Authorised by FE: Click on the down arrow to select the relevant Fee Earner against the undertaking.

Undertaking to: Click on the down arrow to select the relevant Case to whom the undertaking is been given or received.

Who: This will **default** to the selected case associate.

Details: **Input** a description of this undertaking.

Value: **Input** the amount the undertaking is for.

Status: Click on the down arrow and **select** the required status.

Dealing Number: **Input** the dealing number

4. Click OK to save the undertaking will now be visible in the undertaking screen.

Attn	Date	Type	Who	Value	Details	Discharge
	21 Jan 2016	Documents	Peter D. Jones & Co.	0.00	Title Documents	

AND

Inserted as a **task** in the case diary assigned to the selected fee earned dated with the warning date set.

All Undertakings can be clearly identified by the Undertaking symbol 

		Search							
Action	C...	A...	P...	D...	A...	Date	Time	Handler	Synopsis
						02 Nov 2015	17:22	CN	Photo Id
						02 Nov 2015	17:16	CN	Letter to Client
						27 Jun 2014	11:19	CN	Undertaking changed by BRIANS
						19 Jun 2014	11:41	BS	Invoice No:230

- To view the Undertaking details **double click** the task the following Change Action dialogue box will appear.
- Click **OK** to close.



Tip: To edit go to the Undertaking screen. Then double click the required undertaking, amend and click OK.

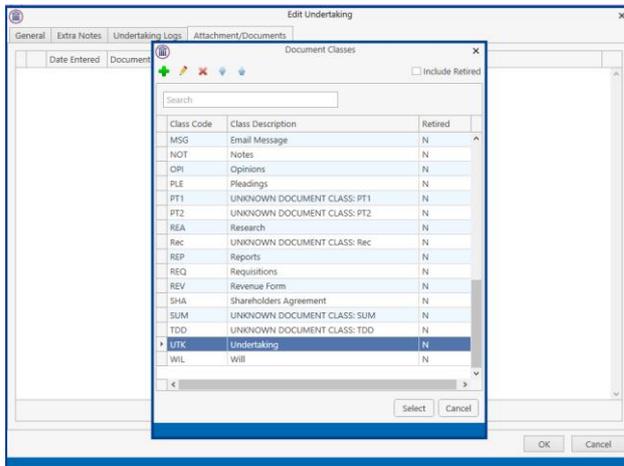
How to Edit an Undertaking

- Go to the **Undertaking** screen.
- Double Click** on the undertaking to be amended. The following dialogue box will appear.
- Amend** as required.
- Click on the **Extra Notes tab** to add additional information and/or click on the **Undertaking log** to view the history of the undertaking.
- Click **OK** to save the changes.

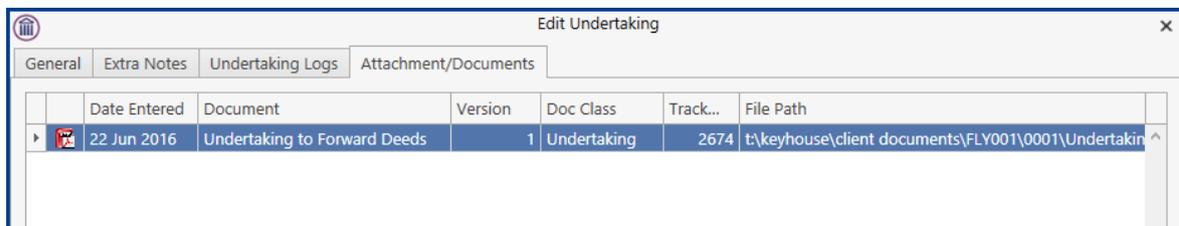
How to Add a Document to an Undertaking

- Go to the Undertakings screen.
- Double Click** on the undertaking to be amended. Click on **Attachment/Document**.
- Right Click in the White Area and click Add

4. Click on Attachment to add the document or Link to Folder to create a link to the location of the document.
5. **Navigate** to the location of the document e.g. Scan Capture folder and select the document.
6. Choose the correct Classification for the document and click Select and click OK

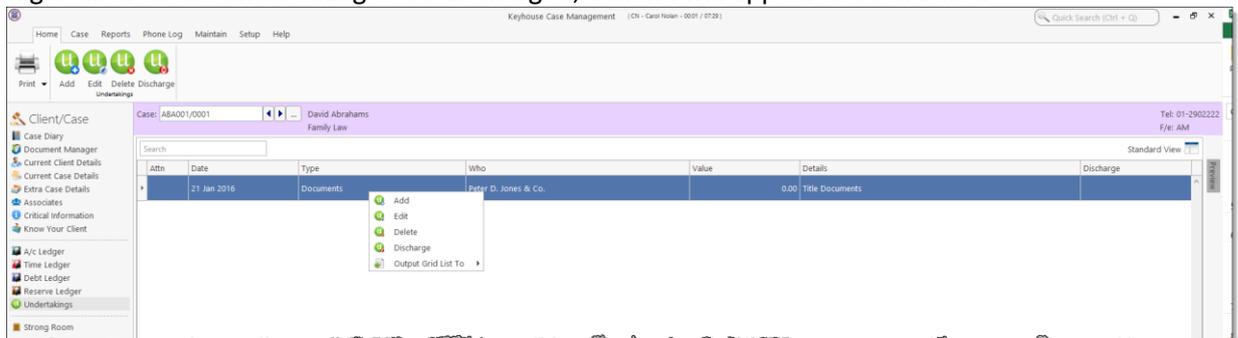


7. The document is now visible on the Undertaking Screen.



How to Discharge an Undertaking

1. Go to the **Undertaking** screen.
2. Right Click on the undertaking to be discharged; a menu will appear as seen below



3. Click on the **Discharge**; the following dialogue box will appear displaying the undertaking.

4. Input a description in the discharge description box.

5. Click **OK** you will then return to the undertaking screen where the undertaking will have a discharge date lodged against.

NOTE: It cannot be edited beyond this point.

NOTE: Not all users will have permissions to discharge an undertaking.

Undertakings Register

All undertakings where given or received will appear on the Undertakings Register in Firm Undertakings on the Search/Open Screen.

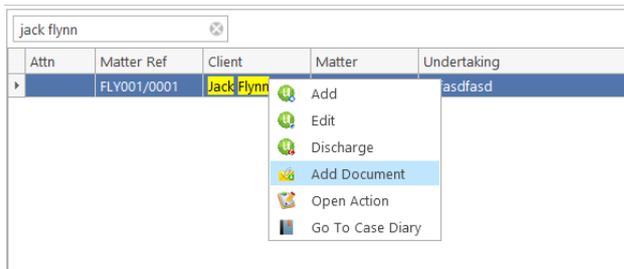
Attn	Matter Ref	Client	Matter	Undertaking	Undertaking...	Discharge Date	Authorised By	Value	Type	For Who	Status	Action...	Given...	Discharge Description	Discharge By	Dealing Num...
	BAR001/0002	Tony Barry	Purchase 23 L...	First Active - Undertaking re Sa...	10 Mar 2010	21 Sep 2011	Carol Nolan	245400.00	F	First Active	NA	721	Given			
	BIL001/0001	Noel Billing	RTA Brenhams...	VH - Refund medical expenses...	30 Jun 2010		Justin Phelan	105000.00	F	VH - Refund...	NA	722	Given		JP	182/98011
	DEV001/0001	Noel Devlin	Credit Card D...	MBNA - repay credit card debt...	03 Apr 2011		Stephen Keogh	15124.26	F	MBNA credit...	NA	723	Given			
	DOH001/0005	Frank Doherty	Employment L...	Employment contract held	17 Sep 2011		Martina Winte...	0.00	D	Stone & Co r...	NA	724	Given			
	CAM001/0001	Tony & Marie...	Sale 6 Brighto...	NIB - return title deeds if sale n...	30 Jan 2010	30 Apr 2010	Carol Nolan	0.00	D	NIB Sale Proc...	NA	725	Given		JP	
	CAM001/0002	Tony & Marie...	Purchase 66 A...	Discharge balance of purchase...	20 Apr 2010	16 Feb 2012	Justin Phelan	202000.00	F	ESB Discharg...	NA	728	Given		BS	
	CAM001/0001	Tony & Marie...	Sale 6 Brighto...	Redeem Mortgage to BOI	08 Apr 2010	16 Feb 2012	Justin Phelan	238342.50	F	BOI Redeem...	NA	729	Given		BS	
	DEM001/0002	John Denoman	RTA - Donnyb...	Pay Church & General - Insuran...	28 Feb 2009	03 Apr 2009	Brian Sweeney	25500.00	F	Church & Gen...	NA	730	Given		JP	
	FOX001/0001	Jennifer Fox	Redundancy a...	AIB personal loan	24 May 2010		Martina Winte...	45000.00	F	AIB personal L	NA	732	Given			
	PUR001/0001	Mick Purcell	Lease renewa...	To furnish original life policy do...	12 May 2010		Brian Sweeney	0.00	D	AIB	NA	733	Given			
	KELO01/0001	Mary Keller	Loan - 96 Kilp...	Contact: 485,000 to be paid fro...	31 Jan 2009		Stephen Keogh	85000.00	F	AIB	NA	734	Given			
	LYN001/0001	Roger Lynch	Sale 89 Cruml...	Redeem credit card debit	15 Jan 2009	22 Mar 2009	Justin Phelan	7891.00	F	MBNA Credit...	NA	760	Given		BS	
	LYN001/0001	Roger Lynch	Sale 89 Cruml...	Repay loan out of sale proceeds	15 Jan 2009	22 Mar 2009	Justin Phelan	12134.67	F	Crumlin & Dis...	NA	761	Given		BS	
	LYN001/0001	Roger Lynch	Sale 89 Cruml...	Pay loan and overdraft from sa...	15 Jan 2009	22 Mar 2009	Justin Phelan	3852.65	F	AIB	NA	762	Given		BS	
	LYN001/0001	Roger Lynch	Sale 89 Cruml...	repay car loan out of sale proc...	15 Jan 2009	16 May 2009	Justin Phelan	23548.87	F	GE Money	NA	763	Given		BS	
	CDW001/0001	Sean O'Dwyer	Re-mortgage...	Discharge stamp duty on remo...	25 Nov 2010		Justin Phelan	15000.00	F	Revenue Com...	NA	764	Given			
	CDW001/0001	Sean O'Dwyer	Re-mortgage...	Discharge Tax Liability for 2007...	25 Nov 2010		Justin Phelan	24000.00	F	Collector Gen...	NA	765	Given			
	OWE001/0001	Peter Owen	Work Injury	Return Mortgage Document to...	27 Sep 2010	22 Dec 2010	Brian Sweeney	0.00	D	AIB	NA	0	Given		SK	
	OWE001/0001	Peter Owen	Work Injury	Discharge stamp duty on com...	28 Oct 2010	03 Dec 2010	Stephen Keogh	9500.00	F	Revenue Com...	NA	776	Given		SK	
	QUI003/0001	John Quigley	RTA 30th Sept...	Return insurance monies includ...	31 Dec 2011		Martina Winte...	10525.00	F	Eagle Star	NA	778	Given			
	TRA001/0001	Ken Traynor	Management...	test	04 Oct 2011		Stephen Keogh	0.00	D	AIB	NA	789	Given			
	ABR001/0001	George J Abb...	Sale 45 Som...	Title Deeds	19 Oct 2011	04 May 2011	Brian Sweeney	600000.00	D	First Active	Pre R...	795	Given		MW	78654FN
	BUT001/0002	Noel Butler	Lease Agree...	Title Deeds	30 Nov 2011		Brian Sweeney	200000.00	D	EB5 Bray	Pre R...	826	Given			F567777
	KEO003/0002	Sam Keogh	RTA	test	20 Oct 2011		Brian Sweeney	0.00	D	test	Pre R...	849	Given			
	REC001/0001	Angela Beck	Sale of 56 Ch...	Title Deeds	10 Nov 2010		Brian Sweeney	600000.00	F	First Active	Pre R...	889	Given			1234FN
	BAR001/0002	Tony Barry	Purchase 23 L...	Title Deeds	31 Jan 2012	31 Jan 2012	Justin Phelan	0.00	D	First Active	Pre R...	973	Given		MW	
	BE5001/0001	Business Time...	Lease of Unt...	Title Deeds	12 Jul 2011		Brian Sweeney	670000.00	D	First Active	Pre R...	1303	Recei...			6788F
	ABA001/0001	David Abraha...	Family Law	Title Documents	27 Jun 2014		Martina Winte...	0.00	D	Peter D. Jone...	Pre R...	1388	Recei...			
	TOB001/0001	Avril Tobin	Sale of The C...	Title Deeds	01 Dec 2011		Brian Sweeney	300000.00	F	Trustee Savin...	Pre R...	1412	Given			1234/FN
	LAW001/0001	Liz Lawlor	Advice re Inhe...	Title Deeds	02 Feb 2012		Brian Sweeney	300000.00	D	EB5 Bray	Pre R...	1455	Given			
	BLO001/0004	Joe Bloggs	Commercial...	Title Deeds	14 Feb 2012		Martina Winte...	0.00	D	Dun Laoghair...	NA	1562	Given			
	CL001/0001	Bill Clinton	Unfair dismis...	overdraft	15 Mar 2012		Martina Winte...	6750.00	D	National Irish...	NA	1609	Given			
	ABR001/0001	George J Abb...	Sale 45 Som...	Title Deeds	27 Feb 2015		Brian Sweeney	450000.00	D	First Active pl...	Pre R...	2931	Given			
	DEA001/0002	James Deane	Sale 56 Green...	Title Deeds	21 Feb 2015		Brian Sweeney	330000.00	D	First Active pl...	Pre R...	2932	Recei...			

This register can be used to search for and preview undertakings without the necessity of opening them.

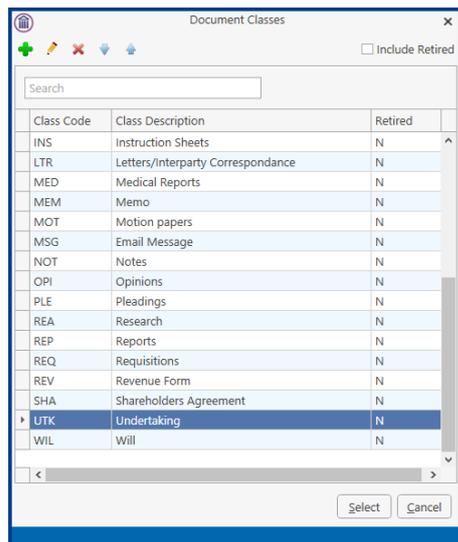
The screenshot shows the Keyhouse Case Management software interface. The main window displays a list of undertakings with columns for Attn, Matter Ref, Client, Matter, Undertaking, Undertaking..., Discharge Date, Authorised By..., Value, Type, For Who, Status, Action..., Given..., and Discharge Descript. A search bar is visible at the top left. On the right side, a preview pane shows details for a specific undertaking, including the date (10/03/2009), type (Financial Given), and authorized by (CN Carol Nolan).

Attaching Undertaking Documents using the Undertakings Register

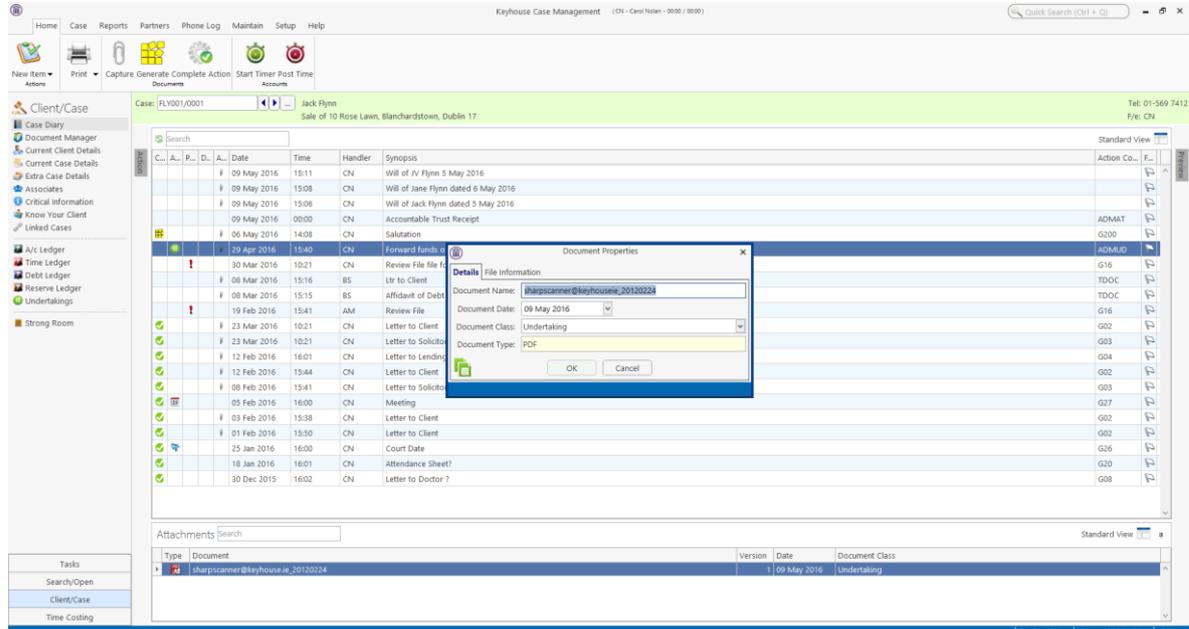
1. Go to **Search Open** and select **Firm Undertakings**.
2. Search for the required **Undertaking** and right click.



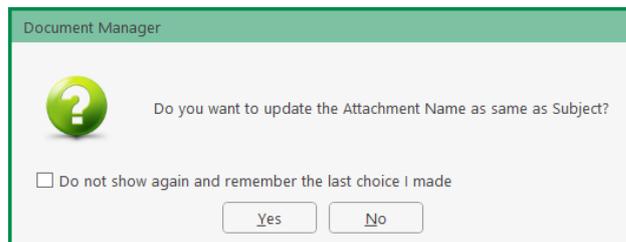
3. Select **Add Document**.
4. **Navigate** to the location of the document e.g. Scan Capture folder and select the document.
5. Highlight the **Document Class** and click **Select**.



6. The document is now visible in the **Case Diary**. Go to the **Case Diary** and locate the **Undertaking**.
7. If the document needs to be renamed go to the **Attachment** Section, select the document and right click.
8. Select **Properties**.



9. **Rename** the document and click OK.
10. A prompt to link the document name to the action will appear. Choose **Yes** if you want to change the name of the action otherwise click **No**.



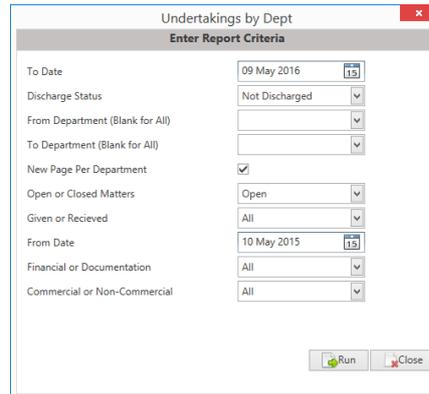
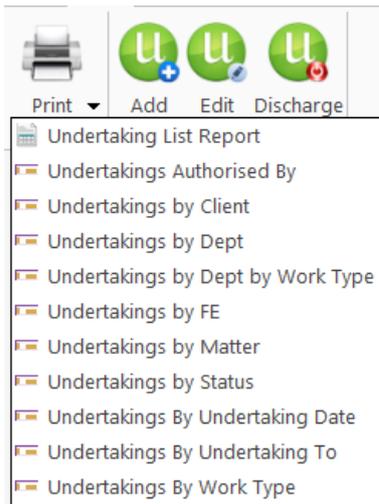
Undertaking Reports

Reports on Undertakings can be created based on a number of criteria. The reports are available as part of the System Reports but they can also be found in the Firm Undertakings on the Search/Open Screen. There are also 2 reports available in Undertakings on the Case Diary.

Create an Undertaking Report

1. Go to **Firm Undertakings** on the Search/Open Screen.

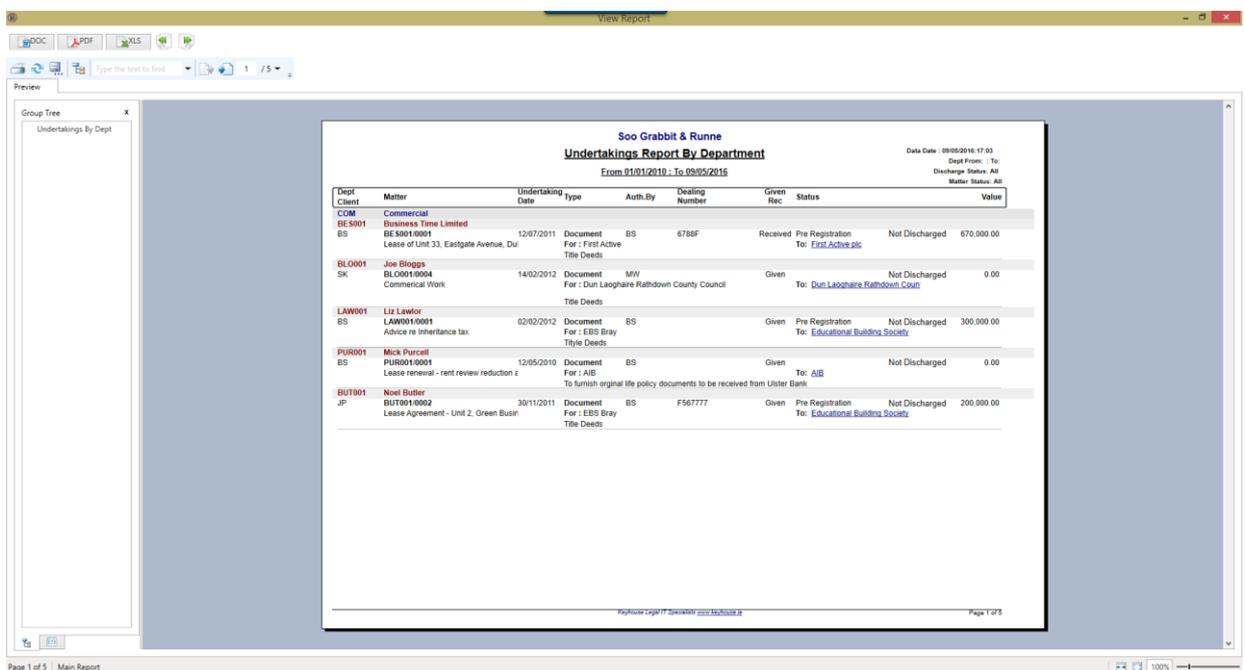
2. Select **Print** and a list of reports will appear.



3. Click on the required report e.g. Undertakings by Dept. and the following report dialog box will appear.

4. **Complete** the required information. If you require all departments, leave the fields blank.

5. Click on **Run** and the report will generate.

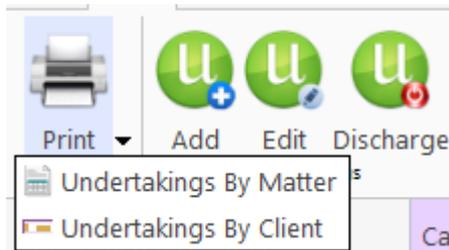


6. Click on print  or click on one of the following options available on the report toolbar:

- Click on Doc  to open a copy to Word
- Click on PDF  to open in Adobe.
- Click on XLS  to open a copy in Excel.

Printing from Undertakings

1. Click to **Case Diary** and select **Undertakings** from the Column on the left.
2. Click on the **Print** option on the Ribbon.



3. From the required report and a dialog box will appear.

7. Set the required **parameters** and run the report.
8. Click on **print**  or click on one of the following options available on the report toolbar:

- Click on Doc  to open a copy to Word
- Click on PDF  to open in Adobe.
- Click on XLS  to open a copy in Excel.

How to view Critical Information and Print Reports

1. **Open** the required case in the Case Diary
2. Click on **Critical Information** on the **Navigation** panel. The following screen will appear displaying critical Information.

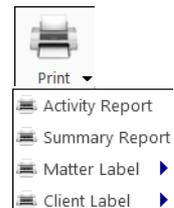
The screenshot displays the Keyhouse Case Management software interface for case BLA001/0001. The main content area is divided into several sections:

- Account Summary:** A table showing financial details such as Debtors A/c (147.35), Outlay A/c (3,336.61), and Current Outstanding Fees (121.78).
- Action Summary:** A table showing Start Date (08 May 2010), Solicitor (Brian Sweeney), and Statute Date (25 Mar 2015).
- Case Status:** A table showing Last Action (CN), Last Milestone Action, Next Action (BS), and Last Record Time (MK).
- Outstanding Critical Dates:** A table showing a date of 14 Mar 2018 with status CN and description Critical Date.
- Undertakings:** A table showing a description 'provide proof of ID' with value 0.00, who 'THE CITY OF DUBLIN', and given/received status.
- Time By F/e:** A table showing time spent by various users like Stephen Keogh, Brian Sweeney, and Martina Winters.

3. To **Print** a report click on **Print** on the toolbar the following option will appear.
4. **Click** on the **Report** required

For Activity Report: Click on Activity Report

The current case code will appear; **amend** if required
Set the **date** parameters
Tick the items you want included e.g. Emails, attachments etc.
Click Run



Summary Report: Click on Case Summary Report

The current case code will appear **amend** if required.
 Then click **Run**.

Print Labels: Click on **Matter Label** or **Client Label** as required

Other Case Diary Functions

See the following Chapters for information on the following functions available in the Case Diary:

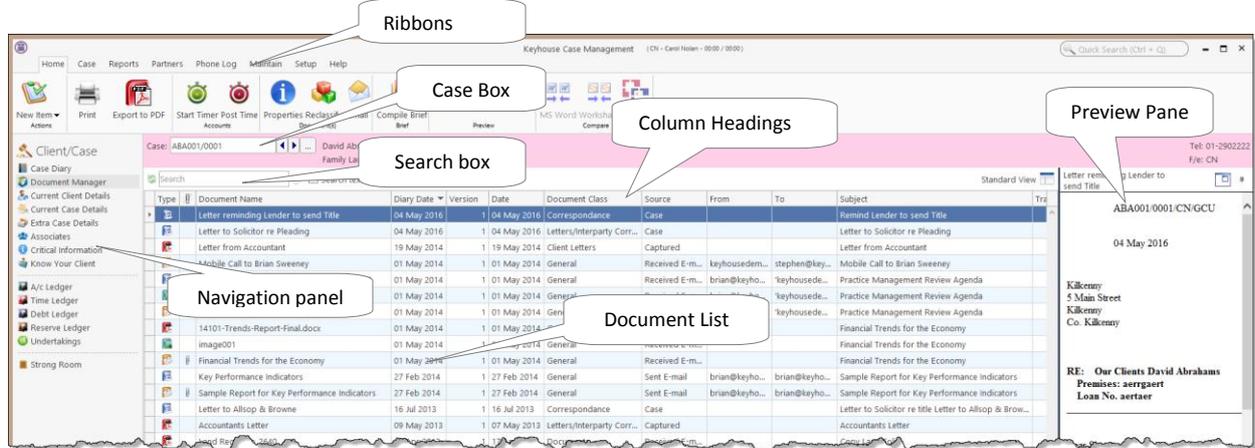
- Chapter 6 for the Keyhouse Capture
- Chapter 7 for the template Library
- Chapter 8 for the Conflict Search
- Chapter 10 for the Strong Room
- Chapter 11 for Time Recording
- Chapter 12 for Accounts
- Chapter 13 for the Debt Ledger
- Chapter 14 for the Reserve Ledger

Chapter 5: Using the Document Manager

Document Manager

Getting around Document Manager

Below is an image of the Document manager window.

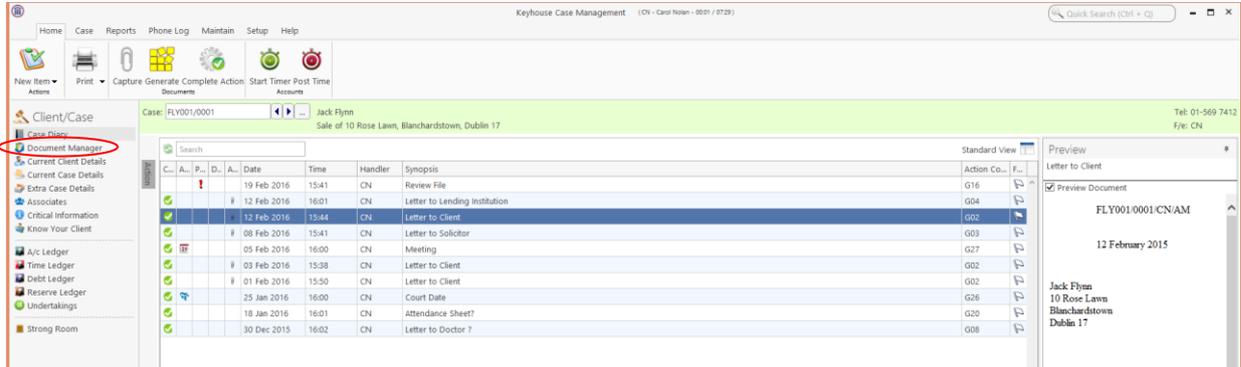


Window area	Description
Case Box	Input the case reference in this box or click the ... browse button and search for the required case.
Column Headings	Click the column headings to sort the list of documents by name, version, diary date, document date, document class, Source, From, To, Subject.
Document List	The list of documents in this case are displayed.
Preview Pane	The selected document is previewed in this window
Search box	Enter search text in this box

Home tab	Description
	Print
	Show document properties
	Reclassify: change the document class
	Click to email current document
	Compile Brief: If no Brief currently exists, this button launches the Brief Wizard . If there is an existing Brief, this button opens the existing Brief in the Brief Maintenance window
<input checked="" type="checkbox"/> Use Adobe PDF Viewer	Tick to use Adobe Reader to preview document.
	Compare two documents using Word's Document Compare feature
	Compare two documents using WorkShare (if installed)
	Compare two documents using Libéra

How to search the Document Manager

1. **Open** a case in the case diary.
2. Click **Document Manager** on the Navigation panel. All the attachments in the case will be listed.
3. **Input** the search terms in the **Search box**. The search results will update in real time, showing all



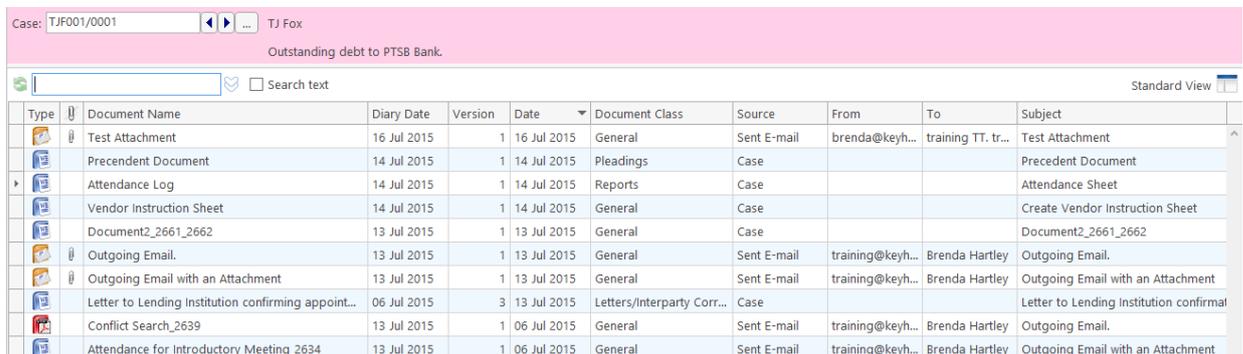
documents containing any of the search terms.



4. **Select** a document to see a preview. **Double click** to the open the document.

How to Sort by Column Heading

1. Click a column heading to sort by that heading. Click again to reverse the sort order. See the example below the documents have been sorted alphabetically by **Document Class**.



2. To remove the sort, **right-click** the column heading and choose **Clear Sorting** from the pop-up menu.



How to Filter Columns

1. Move your cursor to the column heading required, so that the **filter pin** appears.
2. Click the filter pin and select the required filter from the drop-down menu.

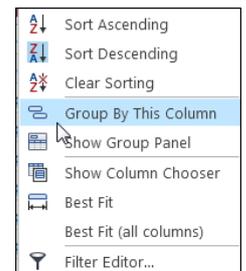
Type	Document Name	Diary Date	Version	Date	Document Class	Source	From	To	Subj
	Expenses Claim Form 2015 from 1st July2015	16 Jul 2015	1	30 Jun 2015	General	(Blanks)		keyh... training TT. tr...	Test
	Test Attachment	16 Jul 2015	1	16 Jul 2015	General	(Non blanks)		keyh... training TT. tr...	Test
	Precedent Document	14 Jul 2015	1	14 Jul 2015	Pleadings	Client Letters			Prec
	Attendance Log	14 Jul 2015	1	14 Jul 2015	Reports	Conflict Search			Atter
	Vendor Instruction Sheet	14 Jul 2015	1	14 Jul 2015	General	General			Crea
	Document2_2661_2662	13 Jul 2015	1	13 Jul 2015	General	Instruction Sheets			Crea
	Conflict Search_2639	13 Jul 2015	1	06 Jul 2015	General	Letters/Interparty Correspondance			Docu
	Outgoing Email.	13 Jul 2015	1	13 Jul 2015	General	Memo		keyh... Brenda Hartley	Outc
	Attendance for Introductory Meeting_2634	13 Jul 2015	1	06 Jul 2015	General	Pleadings		keyh... Brenda Hartley	Outc
	Outgoing Email with an Attachment	13 Jul 2015	1	13 Jul 2015	General	Reports		keyh... Brenda Hartley	Outc
	Conflict Search	06 Jul 2015	1	06 Jul 2015	Conflict Search	Sent E-mail	training@keyh...	Brenda Hartley	Outc
	Attendance for Introductory Meeting	06 Jul 2015	1	06 Jul 2015	Instruction Sheets	Case			Conf
	Letter to Lending Institution confirming appoint...	06 Jul 2015	3	13 Jul 2015	Letters/Interparty Corr...	Case			Initia
	Letter to Lending Institution confirming appoint...	06 Jul 2015	1	06 Jul 2015	Letters/Interparty Corr...	Case			Lette

3. To remove the filter, select **(All)** from the filter pin drop-down menu (alternatively right-click the column heading and select **Clear Filter** from the pop-up menu).

How to Group by Column

1. **Right-click** the column heading you want to group by, to show the pop-up menu.
2. Select **Group By This Column**. In the following example, the documents are grouped by document class.

Type	Document Name	Version
▶ Document Class: Attendance Sheet		
▶ Document Class: Letters/Interparty Correspondance		
▶ Document Class: Medical Reports		



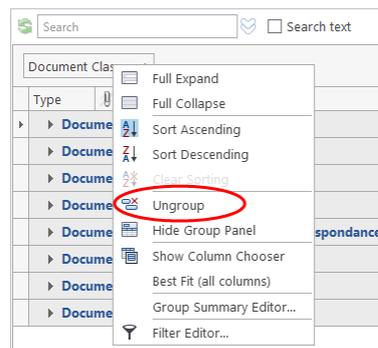
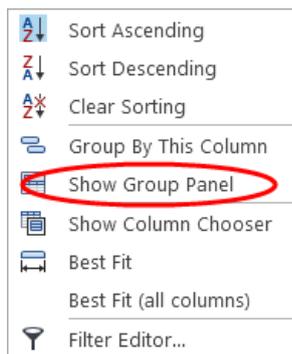
3. To **expand/collapse** a group click the **arrow** to the left.

Type	Document Name	Version	Diary Date	Date	Source	From	To	Subject
▶ Document Class: Attendance Sheet								
▶ Document Class: Letters/Interparty Correspondance								
	Letter to Client	1	20 Apr 2010	29 Jan 2011	Case			Letter to Client re advice
	Letter to Solicitor	1	24 Apr 2010	29 Jan 2011	Case			Letter to Land Registry
	Letter to Solicitor	1	10 Jun 2010	29 Jan 2011	Case			Letter to Solicitor
	letter from hospital consultant	1	04 Jul 2011	04 Jul 2011	Received E-m...	Martina Winte...	martina@keyh...	doctors report
	Letter to insurance company	1	08 Oct 2014	23 Nov 2014	Case			Letter to insurance compan
	Letter to Barrister	1	13 Nov 2014	23 Nov 2014	Case			Letter to Barrister
	Letter to Doctor	1	23 Nov 2014	01 Oct 2014	Case			Letter to Doctor
▶ Document Class: Medical Reports								

4. It is possible to nest group levels: first group by one column heading, then right-click the next required column heading and click **Group By This Column**. In the following example, the documents are grouped first by **Document Class** and then by **Source**.

Document Class: Letters/Interparty Correspondance							
Source: Case							
	Letter to Client	1	20 Apr 2010	29 Jan 2011			Letter to Client re advice
	Letter to Solicitor	1	24 Apr 2010	29 Jan 2011			Letter to Land Registry
	Letter to Solicitor	1	10 Jun 2010	29 Jan 2011			Letter to Solicitor
	Letter to insurance company	1	08 Oct 2014	23 Nov 2014			Letter to insurance company
	Letter to Barrister	1	13 Nov 2014	23 Nov 2014			Letter to Barrister
	Letter to Doctor	1	23 Nov 2014	01 Oct 2014			Letter to Doctor
Source: Received E-mail							
	letter from hospital consultant	1	04 Jul 2011	04 Jul 2011	Martina Winte...	martina@keyh...	doctors report

To remove the grouping, right-click in any column heading and select **Show Group Panel** from the pop-up menu. The group panel will contain each of the headings by which the documents are grouped (**Document Class** and **Source** in this example). Right-click each of these in turn and select **Ungroup** from the pop-up menu. **It is also possible to drag the heading back onto the Heading Row once the Show Group Panel is visible.**

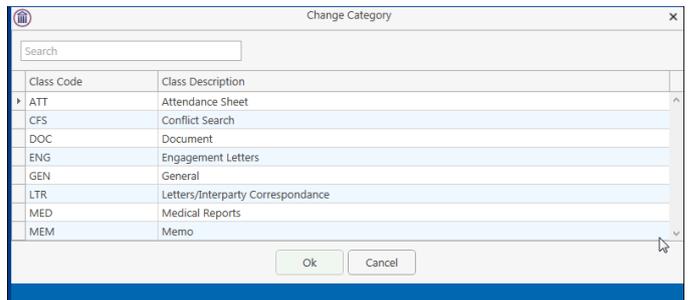


How to reclassify Documents

1. Select the document or documents you want to reclassify and click **Reclassify** on the Home tab, to bring up a list of the available document categories.

TIP: To select multiple documents: Hold down **CTRL** on your keyboard and click each of the documents to be selected.

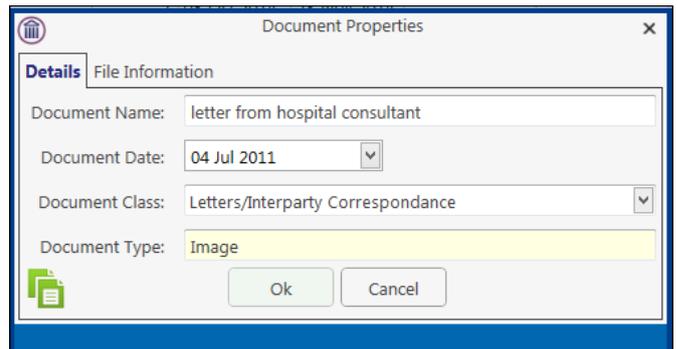
2. **Search** for the required category, if necessary, and select it.



3. Click **OK**.

How to change the Document Properties

1. Select the document or documents whose properties you want to amend.
2. Click **Properties** on the Home tab, to show the Document Properties dialogue box.



- You may amend the **Document Name**, **Date**, **Document Class** or **Type**. To change the Document Class, select from the drop-down list, which will show the available classes.
- The properties on the **File Information** tab are read-only; you may copy the document name and path to the clipboard.

How to email Document(s)

- Select the document or documents you want to email then click **Email** on the Home tab.

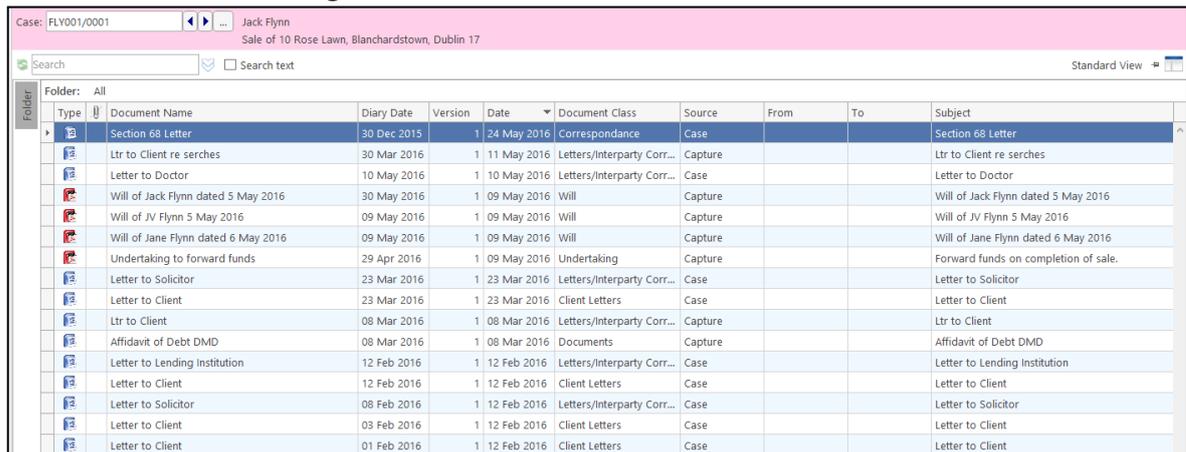
 **TIP:** To select multiple documents: Hold down **CTRL** on your keyboard and click each of the documents required.

- Outlook will create a new email with the document(s) attached; complete the email as normal and send.

Document Folders

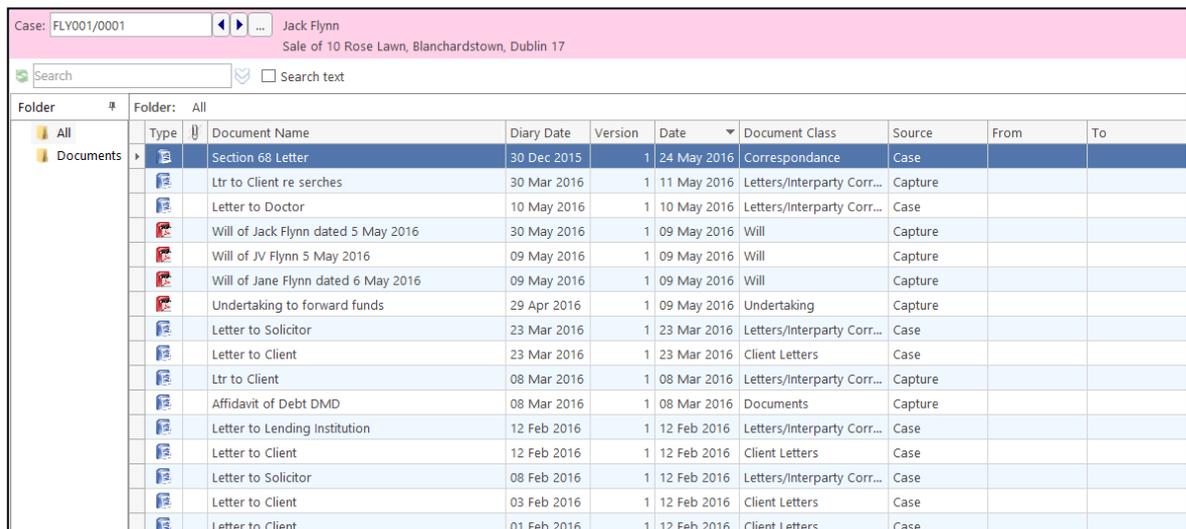
It is now possible to have a Document Folder structure in the Matter. This can be created in the Workflow Setup and accessed and maintained in the Document Manger for each matter or it can be created on a matter by matter basis. In order to use this feature, it must be turned on in the Administration section on the Setup Tab. Documents can be moved, linked or copied into the folders but they are all still visible in the All Folder.

- Go to the **Document Manager**.



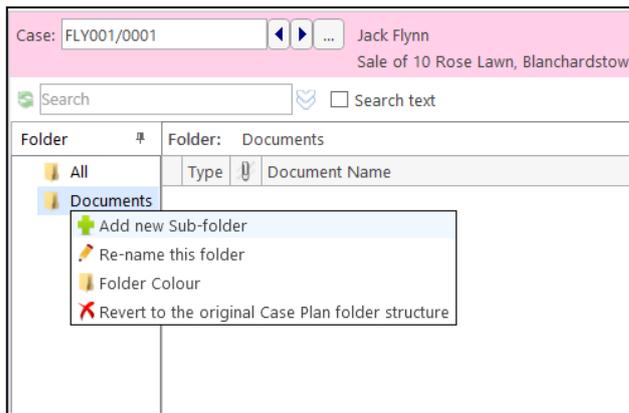
Folder	Type	Document Name	Diary Date	Version	Date	Document Class	Source	From	To	Subject
		Section 68 Letter	30 Dec 2015	1	24 May 2016	Correspondance	Case			Section 68 Letter
		Ltr to Client re serches	30 Mar 2016	1	11 May 2016	Letters/Interparty Corr...	Capture			Ltr to Client re serches
		Letter to Doctor	10 May 2016	1	10 May 2016	Letters/Interparty Corr...	Case			Letter to Doctor
		Will of Jack Flynn dated 5 May 2016	30 May 2016	1	09 May 2016	Will	Capture			Will of Jack Flynn dated 5 May 2016
		Will of JV Flynn 5 May 2016	09 May 2016	1	09 May 2016	Will	Capture			Will of JV Flynn 5 May 2016
		Will of Jane Flynn dated 6 May 2016	09 May 2016	1	09 May 2016	Will	Capture			Will of Jane Flynn dated 6 May 2016
		Undertaking to forward funds	29 Apr 2016	1	09 May 2016	Undertaking	Capture			Forward funds on completion of sale.
		Letter to Solicitor	23 Mar 2016	1	23 Mar 2016	Letters/Interparty Corr...	Case			Letter to Solicitor
		Letter to Client	23 Mar 2016	1	23 Mar 2016	Client Letters	Case			Letter to Client
		Ltr to Client	08 Mar 2016	1	08 Mar 2016	Letters/Interparty Corr...	Capture			Ltr to Client
		Affidavit of Debt DMD	08 Mar 2016	1	08 Mar 2016	Documents	Capture			Affidavit of Debt DMD
		Letter to Lending institution	12 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr...	Case			Letter to Lending institution
		Letter to Client	12 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client
		Letter to Solicitor	08 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr...	Case			Letter to Solicitor
		Letter to Client	03 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client
		Letter to Client	01 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client

- Click on **Folder** and pin into position.



Folder	Type	Document Name	Diary Date	Version	Date	Document Class	Source	From	To	Subject
Documents		Section 68 Letter	30 Dec 2015	1	24 May 2016	Correspondance	Case			Section 68 Letter
		Ltr to Client re serches	30 Mar 2016	1	11 May 2016	Letters/Interparty Corr...	Capture			Ltr to Client re serches
		Letter to Doctor	10 May 2016	1	10 May 2016	Letters/Interparty Corr...	Case			Letter to Doctor
		Will of Jack Flynn dated 5 May 2016	30 May 2016	1	09 May 2016	Will	Capture			Will of Jack Flynn dated 5 May 2016
		Will of JV Flynn 5 May 2016	09 May 2016	1	09 May 2016	Will	Capture			Will of JV Flynn 5 May 2016
		Will of Jane Flynn dated 6 May 2016	09 May 2016	1	09 May 2016	Will	Capture			Will of Jane Flynn dated 6 May 2016
		Undertaking to forward funds	29 Apr 2016	1	09 May 2016	Undertaking	Capture			Forward funds on completion of sale.
		Letter to Solicitor	23 Mar 2016	1	23 Mar 2016	Letters/Interparty Corr...	Case			Letter to Solicitor
		Letter to Client	23 Mar 2016	1	23 Mar 2016	Client Letters	Case			Letter to Client
		Ltr to Client	08 Mar 2016	1	08 Mar 2016	Letters/Interparty Corr...	Capture			Ltr to Client
		Affidavit of Debt DMD	08 Mar 2016	1	08 Mar 2016	Documents	Capture			Affidavit of Debt DMD
		Letter to Lending institution	12 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr...	Case			Letter to Lending institution
		Letter to Client	12 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client
		Letter to Solicitor	08 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr...	Case			Letter to Solicitor
		Letter to Client	03 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client
		Letter to Client	01 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client

3. Right click on **Documents** and select Add new Sub-Folder



4. Enter the name of the folder and click OK
5. Continue to create the required folder structure. Sub-Folders can be added to Sub-Folders.

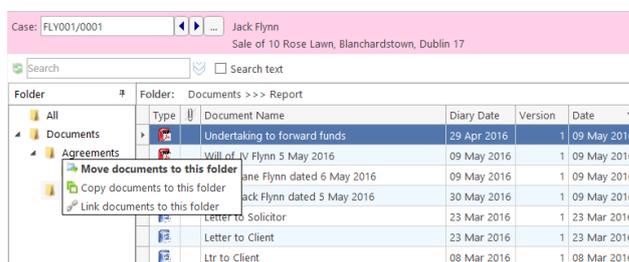
Folder	Type	Document Name	Diary Date
All			
Documents		Section 68 Letter	30 Dec 2015
Agreements		Ltr to Client re serches	30 Mar 2016
Tennancies		Cut and Paste	08 Mar 2016
Reports		Letter to Doctor	10 May 2016
		Will of Jack Flynn dated 5 May 2016	30 May 2016
		Will of JV Flynn 5 May 2016	09 May 2016
		Will of Jane Flynn dated 6 May 2016	09 May 2016

Moving, Linking & Copying Documents in the Folder Structure

1. Click the documents to be moved and **drag** to the appropriate folder.

Alternatively

Right click on the document and drag to the required folder and select **Move document to this folder**.



2. To **copy** or **link** a document into more than one folder, move it to the first folder as per Point 1.
3. Click on the **Folder** and Right Click the document to be copied.
4. **Drag** to the second folder.
5. Select **Copy documents to this folder** or **Link documents to this folder**.

NOTE: The Document Folder Structure can also be accessed in Scan Capture, MS Word and MS Outlook.

Chapter 6: The Task Manager

When you log in to the new version of the Keyhouse Desktop you can choose to login directly to the Task Manager (see the chapter 1 for further information). The primary function of the Task Manager is to act as a To-Do list displaying all tasks outstanding. It defaults to overdue tasks but you can navigate to specific dates. Each task will show the date of the task, the matter description, the client name and a description of the task itself.

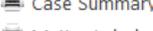
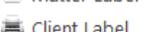
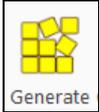
Navigating the Task List

The Task Screen

The screenshot shows the Keyhouse Task Manager interface. At the top is a 'Toolbar' with icons for Home, Case, Reports, Phone Log, and Mail. Below the toolbar is a 'Search Box' containing the name 'Carol Nolan'. On the left side, there is a 'Task views' sidebar with options like 'My tasks', 'Team tasks', 'Day's tasks', 'Next week's tasks', 'Next month's tasks', 'Overdue tasks', 'Outstanding tasks', 'Last week's tasks', 'Last month's tasks', 'All tasks', and 'My Overview'. The main area is a 'Task list' table with columns: Date, Time, Case Code, Handler, Team, From, Client/Case(Matter), Action, and Diary Date. On the right side, there is a 'Document Preview Pane' showing a letter to 'Lending Institution' with details like 'OUR REF', 'YOUR REF', 'DATE', and 'Re: Our Clients - Gordon T. Black Premises - Sale - 2 Trinity Close, Rathgar, Dublin 6 Loan No. - 67889990'. At the bottom, there is a summary bar showing 'Count=60'.

Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action	Diary Date
04 Nov 2014	19:31	GLE001/0001	CN	COM	CN	Charlie Gleeson Lease of South West Georges Street	Review File	04 Nov 2...
04 Nov 2014	19:09	GLE001/0001	CN	COM	CN	Charlie Gleeson Lease of South West Georges Street	Letter to Solicitor	04 Nov 2...
04 Nov 2014	19:07	ABA001/0003	CN	COM	CN	David Abrahams Sale of 22 O'Connell Street, Dublin 1	Letter to Lending Institution	04 Nov 2...
04 Nov 2014	18:16	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Review File	04 Nov 2...
04 Nov 2014	18:15	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Review File	04 Nov 2...
04 Nov 2014	17:26	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Lending Institution	04 Nov 2...
04 Nov 2014	17:25	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Instruction Received	04 Nov 2...
04 Nov 2014	17:25	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Lending Institution	04 Nov 2...
04 Nov 2014	17:24	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Client ?	04 Nov 2...
04 Nov 2014	17:24	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Lending	
04 Nov 2014	17:19	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Doctor	04 Nov 2...
04 Nov 2014	17:11	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Doctor	04 Nov 2...
04 Nov 2014	17:03	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to Doctor	04 Nov 2...
04 Nov 2014	17:03	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to Solicitor	04 Nov 2...
04 Nov 2014	16:55	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to Solicitor	04 Nov 2...
04 Nov 2014	16:52	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to John Dunne	04 Nov 2...
04 Nov 2014	16:44	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to Client	04 Nov 2...
04 Nov 2014	16:35	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to Client	04 Nov 2...
03 Nov 2014	16:37	ABA001/0003	CN	COM	CN	David Abrahams Sale of 22 O'Connell Street, Dublin 1	Letter to Barrister	03 Nov 2...
03 Nov 2014	16:23	ABA001/0003	CN	COM	CN	David Abrahams Sale of 22 O'Connell Street, Dublin 1	Letter to Solicitor	03 Nov 2...

The Home Tab in Task Manager

	<p>New</p>	<p>Click on the New to add any of these tasks.</p>	<ul style="list-style-type: none">  Action  Note  Email  Appointment  Phone Message  Dictation  Draft Invoice  Request Cheque  Conflict Search
	<p>Printer</p>	<p>Click to print any of the following reports:</p>	<ul style="list-style-type: none">  Activity Report  Case Summary Report  Matter Label  Client Label
	<p>Capture</p>	<p>Click on capture to launch the document capture program to import documents or folders of documents or images.</p>	
	<p>Generate</p>	<p>Click to generate a document for a selected action.</p>	
	<p>Complete Action</p>	<p>Click to mark a task as complete.</p>	

Task Views

The Keyhouse Desktop will automatically open on Overdue Tasks. The user may choose to navigate to any of the following lists displayed on the shortcut bar on the left.


My Tasks


Team tasks

Click on My tasks to view the current handler’s tasks or click on Team tasks to view the team tasks


Day's tasks

Click on this to view today’s tasks.

From 01 Jan 1801 To 30 May 2016

Select a range of dates.



Click to view next week's tasks.



Click to view next month's tasks



Click to view Overdue tasks



Click to view outstanding tasks i.e. past, present or future.



Click to view Last Week's outstanding tasks.



Click to view Last Month's outstanding tasks.



All Tasks shows all outstanding tasks



Click to view the overview screen.

Using Different Layouts/Views

1. Click on **View** tool on the far right of the search bar. A list of available views will appear.
2. Click on the required view to apply it to the task manager.



How to Show/Hide the Preview Pane

1. Move your mouse over **Preview** located to the right of the Task Manager Screen the document preview pane will appear
2. The **Preview Pane** will appear.
3. Click on the Pin  to make it permanently visible or click on the Pin  again to return it to floating.

Searching, Sorting, Filtering and Grouping Tasks

How to Search the Task list

1. **Input** key search words in the **Search box**. There is no need to press Enter, as the results will update as you type.



2. The results will appear in the **Task Screen**. See the following example of a search for “review” in the task list.

Handler Carol Nolan <input checked="" type="checkbox"/> Outstanding Only											
Review											Standard View
		Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action	Diary Date	
	!	04 Nov 2014	19:31	GLE001/0001	CN	COM	CN	Charlie Gleeson Lease of South West Georges Str...	Review File	04 Nov 2014	
	!	04 Nov 2014	18:16	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D...	Review File	04 Nov 2014	
	!	04 Nov 2014	18:15	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D...	Review File	04 Nov 2014	
	!	28 May 2014	08:36	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G...	Review all contracts	28 May 2014	
	!	07 May 2014	11:49	KEL002/0001	CN	COM	CN	Sarah Kelly Purchase of Property	Review File	07 May 2014	
		07 May 2014	11:35	OCC001/0001	CN	COM	CN	John O'Connor John O'Connor V John Smith	File Review	07 May 2014	
	!	26 Dec 2013	12:04	KEL002/0001	CN	COM	CN	Sarah Kelly Purchase of Property	Review File	26 Dec 2013	
	!	19 Dec 2013	14:52					Melinda FitzGerald	Review	19 Dec 2013	

3. To clear the search results click **Clear**.

How to Sort Column Headings in the Task Manager

1. Click on the required **column heading** to sort by that column.
2. Click on the column again to reverse the order.

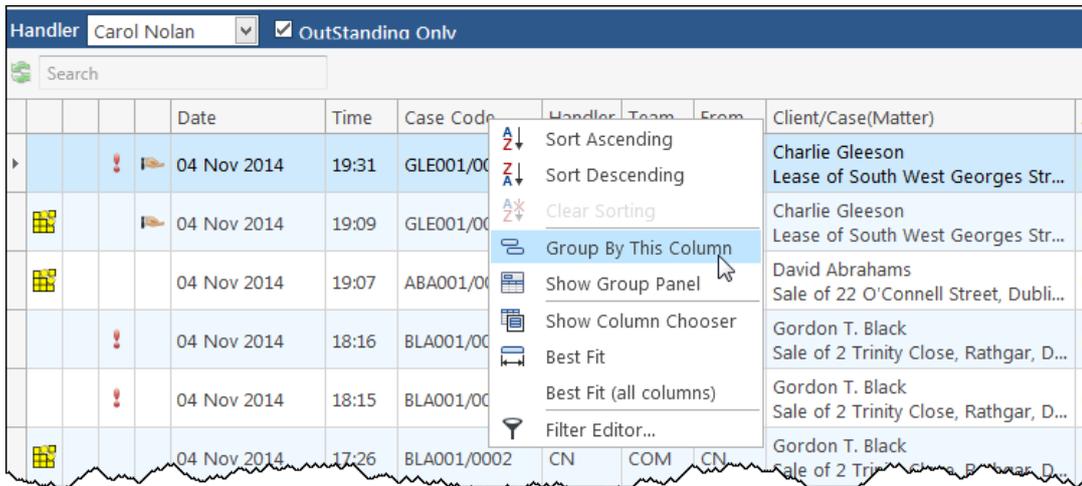
How to Filter the Task Manager

1. Move your mouse to the required column heading.
2. To view a list of filter categories click on the pin and select the required category. See the following example

Handler Carol Nolan <input checked="" type="checkbox"/> Outstanding Only											
Search											
		Date	Time	Case Code	Handler	Team	Fr				
	!	04 Nov 2014	18:16	BLA001/0001	(Blanks)						
	!	04 Nov 2014	18:15	BLA001/0001	(Non blanks)						
		04 Nov 2014	17:26	BLA001/0001	AAA001/0001						
		04 Nov 2014	17:25	BLA001/0001	AAA001/0003						
		04 Nov 2014	17:25	BLA001/0001	ABA001/0001						
		04 Nov 2014	17:25	BLA001/0001	ABA001/0003						
		04 Nov 2014	17:24	BLA001/0001	AB8001/0001						
		04 Nov 2014	17:24	BLA001/0001	AB8001/0007						
		04 Nov 2014	17:24	BLA001/0001	BL001/0001						
		04 Nov 2014	17:24	BLA001/0001	BLA001/0001						
		04 Nov 2014	17:24	BLA001/0001	BLA001/0002						
		04 Nov 2014	17:24	BLA001/0001	BL0001/0005						
		04 Nov 2014	17:24	BLA001/0001	CL001/0001						
		04 Nov 2014	17:19	BLA001/0001	DEA001/0000						
		04 Nov 2014	17:19	BLA001/0001	FS001/0001						
		04 Nov 2014	17:11	BLA001/0001	FT002/0001						
		04 Nov 2014	17:11	BLA001/0001	GLE001/0001						
		04 Nov 2014	17:11	BLA001/0001	KEL002/0001						

How to Group by a column heading in the Task Manager

1. **Right click** on the column you want to group by; the following menu will appear.

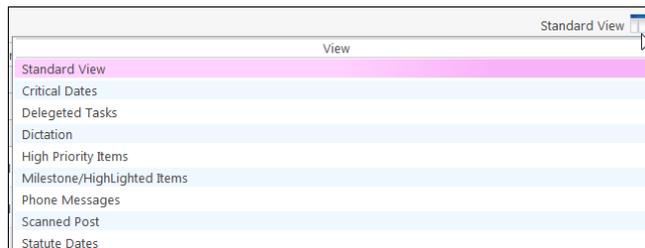


2. Click on **Group By This column**. See the following example of a grouping by fee earner

	Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action
▶	Case Code: AAA001/0001							
▶	Case Code: AAA001/0003							
▲	Case Code: ABA001/0001							
	25 Jun 2014	12:51	ABA001/0001	CN	COM	CN	David Abrahams Family Law	Court Date
	07 May 2014	08:36	ABA001/0001	CN	COM	CN	David Abrahams Family Law	Court Date
▶	Case Code: ABA001/0003							

3. To expand/collapse a group click on the **arrow** to the left. See the following example.

4. To return to the standard view click on the view tool located on the search bar. The following menu will appear click on standard



Working with Tasks

Accessing a Case Diary from the Task List

Double click a task to open the **case diary screen** of the case to which the task belongs.

How to Generate Documents

1. **Right click** on the task you want to generate, and select **Generate Documents** from the pop-up menu.



2. The documents will be generated in the normal way. For further information see the section on generating documents in Chapter 4.

How to View the Documents of a Task

1. **Right click** on a task and select **Open Document** from the pop-up menu.
2. The documents will open in Word.



How to play a dictation

Right click on the task with the dictation you want to hear and select Play Dictation from the pop-up menu.



 **NOTE:** This requires that Keyhouse Digital Dictation be installed.

How to Mark a Single task as Complete

Right click on the task you want to mark as complete and select Complete Action from the pop-up menu to complete an action with today's date. Select Complete Hold Date where you want to complete the action for the day it was generated.



 **Note** if there are any documents which have not yet been generated attached to the task, they will be generated when you complete the action.

How to Tag Several Tasks and Mark as Complete

1. Hold down the **Ctrl** key and click multiple tasks to select them.
2. **Right click** and select Complete Action from the pop-up menu.

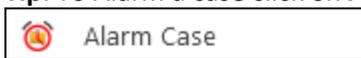
How to Alarm an Action/Case

1. **Right click** on the task you want to alarm and select **Alarm Action** from the pop-up menu. The following screen will appear.
2. Using the drop down arrow set a **Date**
3. Input a **Time** for the alarm.
4. Assign it to yourself or all delegates.
5. Click **OK**.



MatterCode: BLA001/0001
 Alarm: Letter to Solicitor
 Date: 04 Nov 2014 Time: 5:15
 Text: Letter to Solicitor
 Assign To: Carol Nolan
 Delegates: Carol Nolan
 Buttons: OK, Cancel

Tip: To Alarm a case click on **Alarm Case** from the menu.



View Other Users' Tasks

1. Click on the Down Arrow beside the Handler's Name.

Handler: Carol Nolan [v] [x] Outstanding Only

2. Select the **name** required from the list or enter it in the search box.

Code	Name
ADM	Admin
AM	Anne Mellon
BS	Brian Sweeney
CN	Carol Nolan
COM	Commercial
CON	Conveyancing
JP	Justin Phelan
LIT	Litigation
MK	Mark Kelly
MW	Martina Winters

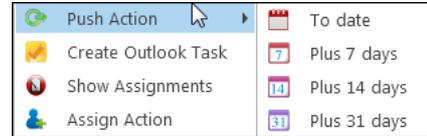
3. The Show Stats box details the tasks outstanding by each user.

Code	Name	Due Tasks	Outstanding Tasks	Outstanding Phone Calls	Team
ADM	Admin	4	4	0	COM
BS	Brian Sweeney	117	122	2	COM
CN	Carol Nolan	29	30	2	COM
JP	Justin Phelan	9	9	0	CON
MK	Mark Kelly	3	3	0	COM
MW	Martina Winters	15	15	0	COM
SK	Stephen Keogh	11	12	0	COM

- Click on the X to close the dialog box.

How to Push a Task

- Right click** on a task and select **Push Action** from the pop-up menu
- The task may be pushed back 7, 14 or 31 days or to a specified date selected from the calendar.



How to Create a Outlook Task

- Right click** on a task and select **Create Outlook Task** from the pop-up menu.
- A task will be created in your **Outlook** task list which you may edit as required.



How to Tag All Tasks

It is possible to **Tag** (or select) all the actions in your task list so that you can mark them as Complete, Generate Documents, View Documents or Print Documents.

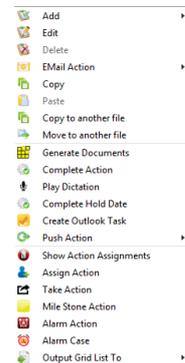
- Right click** in the task list, to see the pop-up menu.
- Click on **Tag All**.



 **Tip:** To UnTag right click and click on **UnTag All**,

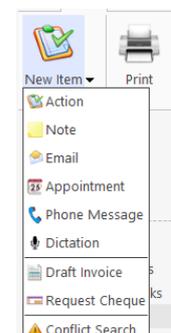


- Right click** again in the task list to bring up the menu again.
- Click on the required function e.g. **Complete Action**.



How to Add a New Item

- Click** on New Item on the Home tab. The following options will appear.
- Click on required item e.g. Note. The following window will appear.



3. Enter the following details:

Case The current case code will appear; to select a different case, click the  **button** to see the matter list. Select the required case.

Action Code Click on the  **button** to see a list of actions, and select the required task.

Date Click the down arrow and select a date from the calendar.

Due Date Click the down arrow and select a due date from the calendar.

Subject Input a subject

F/e Handler This will default to your handler code; use the down arrow to select a different handler if required.

Team The team will default to your team amend if required using the down arrow.

Description Input a description in the box provided.

4. Click **OK** to save the changes.

How to Edit a Task

1. **Right click** on the task to be amended and select **Edit** from the pop-up menu.
2. The action will open for editing.

3. Amend as required and click **OK**.

How to Delete Tasks

1. **Right click** on the task to be deleted and select **Delete** from the pop-up menu.
2. Click **Yes** to confirm that you wish to delete the task.

 **NOTE:** This will delete the action completely from the Case Diary of the matter.

Assigning Tasks

How to Recognise Assigned Tasks

If another handler assigns you a task it will appear in your Task List. It will have a hand symbol next to the task to notify to you that it is an assigned task, as in the example below



	Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action
	04 Nov 2014	19:31	GLE001/0001	CN	COM	CN	Charlie Gleeson Lease of South West Georges Str...	Review File

Note If you are assigned a task, generate and complete the task as normal. For further details see **Chapter 4: Case Diary - Working with Tasks - Assigning Tasks to another User (p.54)**.

How to View the Assignment History of a Task

1. **Right click** on a task and select **Show assignments** from the pop-up menu.
2. The following screen will appear displaying the history of the task.

	By	Action	For	Date Assigned	Time Assigned	Date Returned	Time Returned	Assigned By	Returned By	Delegate	Team
	Carol Nolan(CN)	Delegated	Brian Sweeney(BS)	02 Nov 2015	10:32			CN		CN	COM
	Carol Nolan(CN)	Processed	Carol Nolan(CN)	02 Nov 2015	17:23	02 Nov 2015	17:23	CN	CN	CN	COM
	Carol Nolan(CN)	Created	Carol Nolan(CN)	02 Nov 2015	17:23			CN		CN	COM

How to Assign a Task to another Handler

1. **Right click** on a task and select **Assign Action** from the pop-up menu. The following screen will appear listing all resources.
2. **Select** the resource you want to assign the task to.
3. Check the box marked **Release Action** to remove the task completely from your task list. Alternatively to continue to **own** the task, leave **Release Action** unchecked.

Note If you are the owner of the task and do not release it, you will see this symbol next to the task when the assigned user has “completed” it.

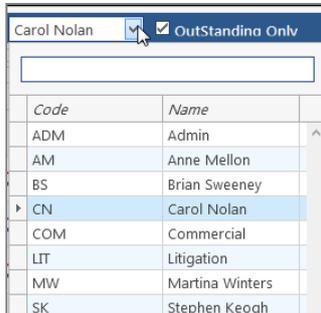
	Code	Name	Number of Due Tasks	Team
	ADM	Admin		LIT
	AM	Anne Mellon	5	COM
	BS	Brian Sweeney	8	COM
	COM	Commercial		COM
	LIT	Litigation		LIT
	MW	Martina Winters	1	LIT
	SK	Stephen Keogh	2	COM

Only the owner of the task can mark the task as complete in the case diary.

How to take a Task

1. Go to another users Task list by clicking the down arrow next to your user name at the top of the Task List and selecting the other user.

2. **Right click** on a task in the other user's list and select **Take Action** from the pop-up menu. The task will be removed from this user's task list.



3. Return to your task list by selecting yourself from the list of users. The task will be in your task list.

Task List Options

Print your task list

1. Click on **Print** on the Home tab. The following window will appear

 A screenshot of a dialog box titled "Handler Diary Report". It has a close button (X) in the top right corner. Below the title bar is a section labeled "Enter Parameters". This section contains several fields:

- Handler Code: A dropdown menu with "CN" selected.
- From Date: A date field showing "27 Jun 2015" with a calendar icon.
- To Date: A date field showing "27 Jul 2015" with a calendar icon.
- Status: A dropdown menu with "Incomplete" selected.
- Action Type: A dropdown menu with "All" selected.
- Sort Report By: A dropdown menu with "Priority" selected.
- Exclude Email Actions: A checked checkbox.
- Exclude Phone Call Actions: A checked checkbox.
- Exclude Notes and reminders: A checked checkbox.
- Client Code (Blank for All): A dropdown menu.

 At the bottom right of the dialog box are two buttons: "Run" (with a green play icon) and "Close" (with a red X icon).

Include Closed:

Check to include closed items

Select the handler:

It will default to the current handler; select another if required using the down arrow.

Select the status:

It will default to Outstanding; use the down arrow to change to All or Complete, if required.

From Date:

Using the calendar to select the start date

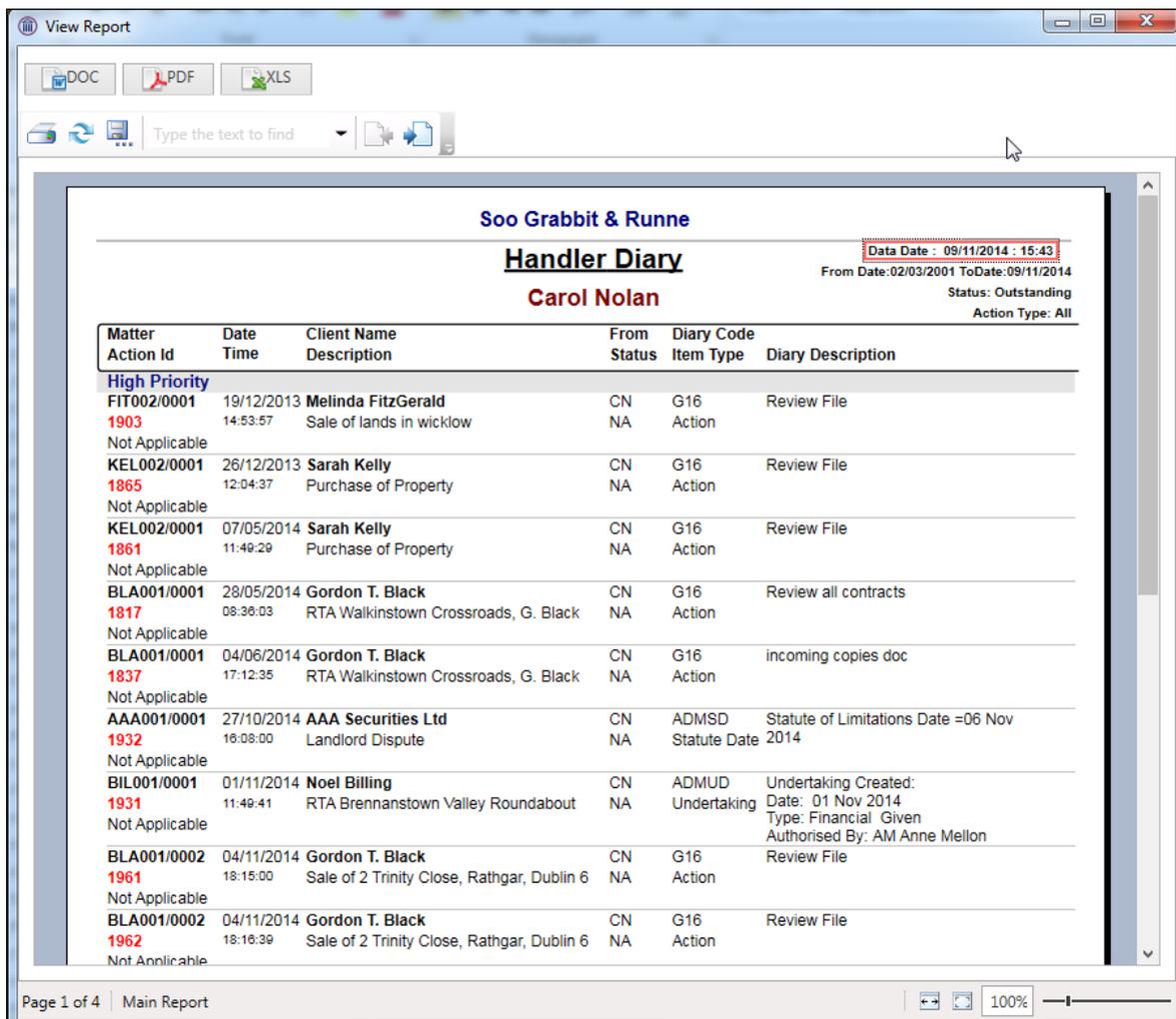
To Date:

Using the calendar to select the end date

- Action Type:** This will default to All; to narrow the criteria select the action type using the down arrow.
- Select the field to sort by:** Using the down arrow select the required field
- Exclude emails:** Check to exclude emails
- Exclude phone calls:** Check to exclude phone calls
- Exclude Notes or reminders:** Check to exclude notes and reminders or exclude.

2. Click on **Run** to generate a report. 

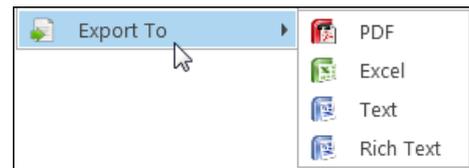
3. You may print the report  or open a copy in:



-  Word;
-  Adobe; or
-  Excel.

How to Export a copy of your task list

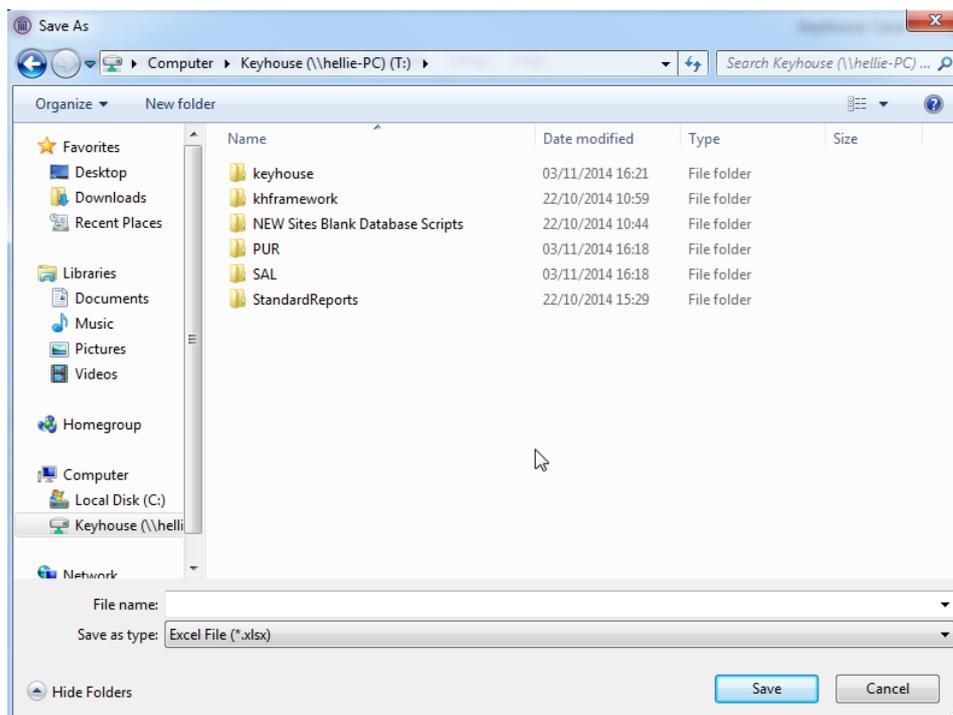
1. **Right click** in your task list and select **Export To** from the pop-up menu.



2. Select the desired option:

- **PDF:** Adobe Portable Document Format.
- **Excel:** An Excel spreadsheet.
- **Text:** A plain text file.
- **Rich Text:** A Rich Text Format (**RTF**) document. RTF documents can be read by most word processors, including Word

3. The Windows **Save As** dialogue box will appear, with the chosen file type selected. Name the file and choose a location in which to save it.



4. Click **Save**.

5. Open the file via **Windows Explorer** or via the open tool in the program chosen.

Chapter 7: Know Your Client

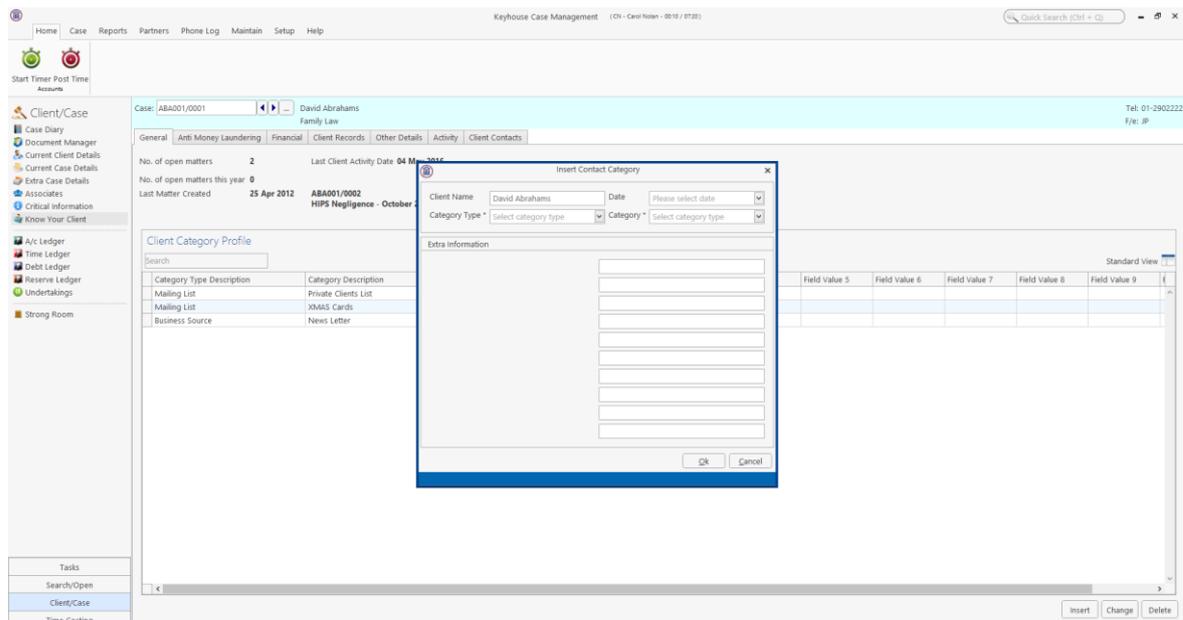
Know Your Client

This section collates information stored on a number of screens in the Keyhouse System into one location. It enables you to see information at a glance. (See subsequent pages for more detailed explanations).

General Tab	Details the profile of your client. It shows all contact groups to which the Client is associated e.g. Taxation Changes Mailing List.
Anti-Money Laundering	It provides details of the type of AML carried out. It also gives information about the type of client and how they were introduced to the firm. It holds documents received as proof of AML.
Financial	Gives a summary of the financial information for the Client in relation to matters and fees.
Client Records	Shows documents that need to be visible across all matters e.g. Service Agreements.
Other Details	Details any Client specific information collected through Client Specific Forms (Set up by Admin Users) e.g. Risk Management
Activity	Details activity carried out on the all matters (Last 400 actions).
Client Contact	Details all client contact information stored for the client.

General Tab

1. To add a category profile to the screen click the Insert button



2. Enter the Date, Category Type and Category and any additional information.
3. Click OK.
4. The new Category will appear in the list.

Anti-Money Laundering

This allows you to record information in relation to the AML carried out for a client.

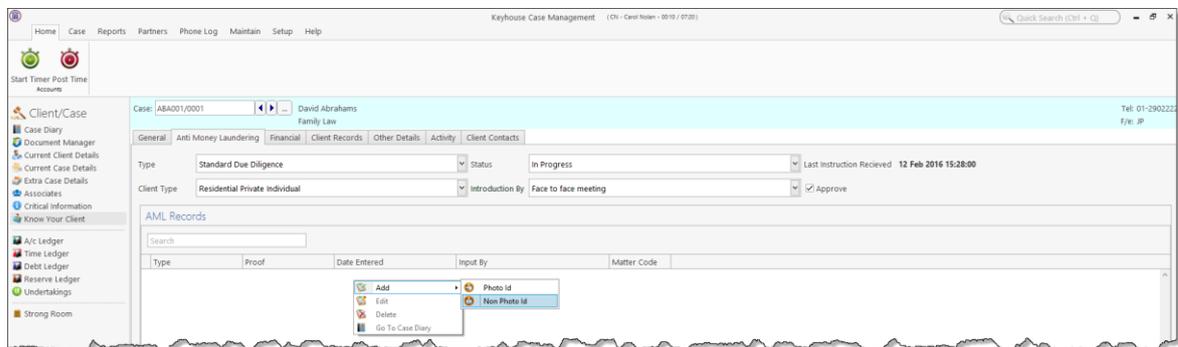
- Type:** The type of AML carried out e.g. Standard Due Diligence, Enhanced Due Diligence etc.
Client Type: Relates to the client category e.g. Corporate, Charity, Public Sector etc.
Status: Records where all checks are complete or are still in progress
Introduced By: Records how the client was introduced to the practice e.g. Third Party, Face to Face Meeting etc.

These categories are in line with Law Society Guidelines.

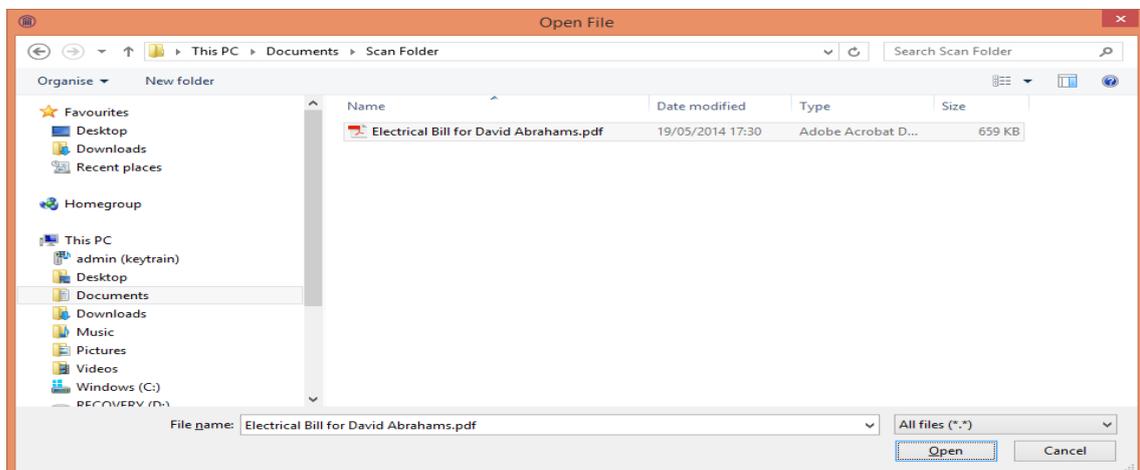
Click on the down arrow beside each option to select the required information.

Document can be added to this screen from outside Keyhouse and documents already in Keyhouse can also appear on this screen.

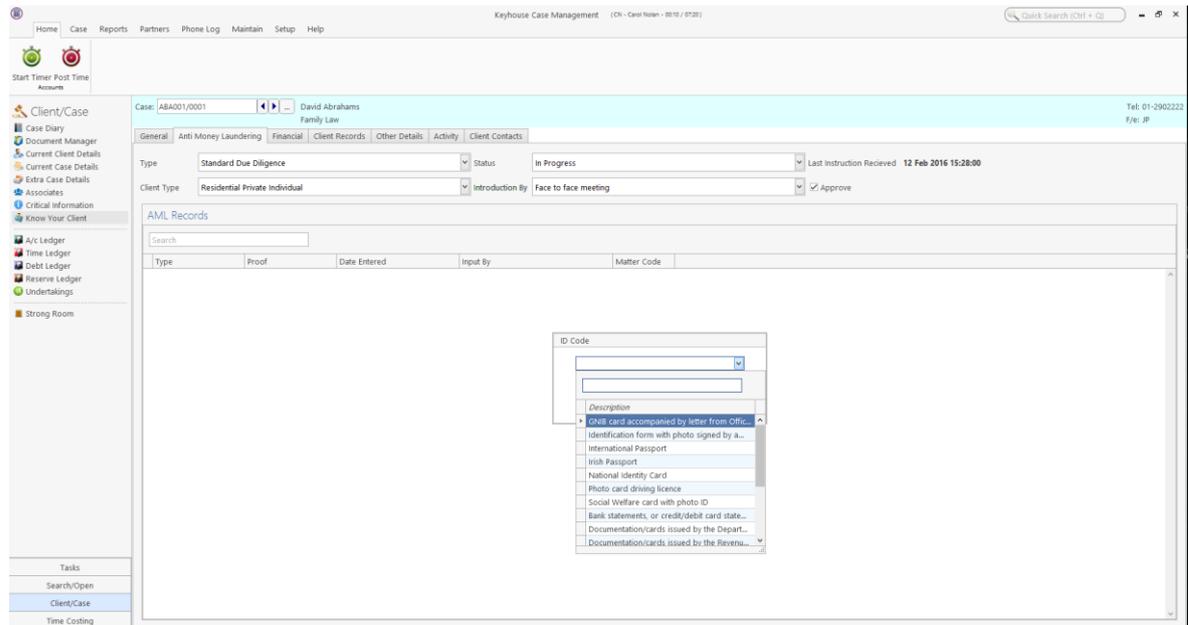
1. To add a document from currently stored outside of Keyhouse, right click in the **white area** and select **Add**.



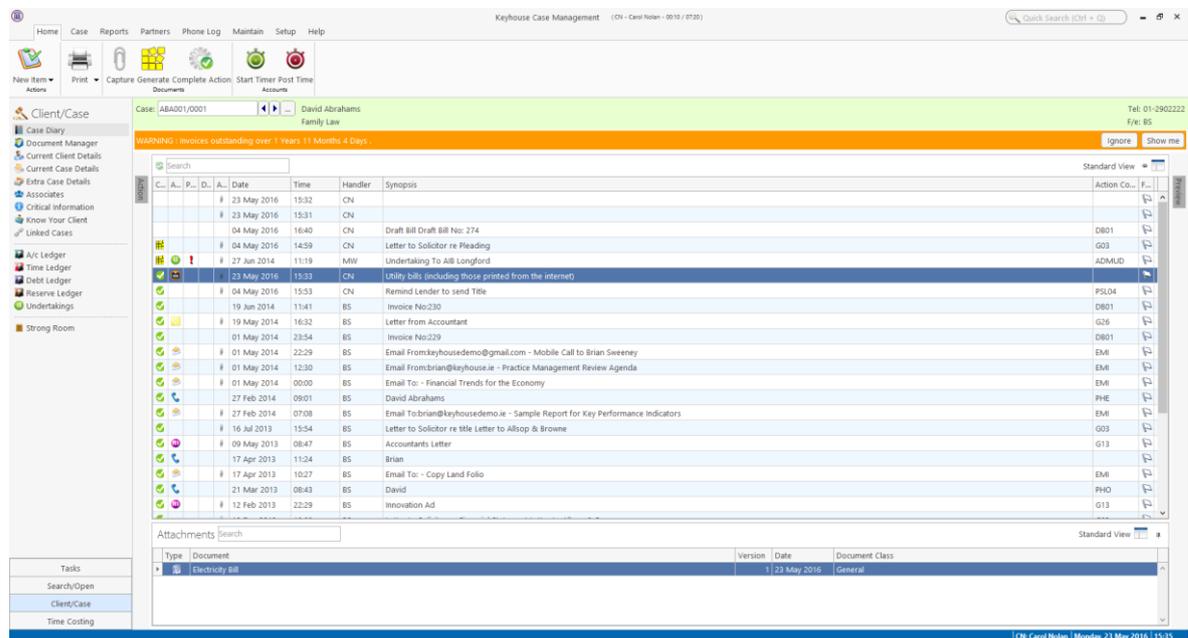
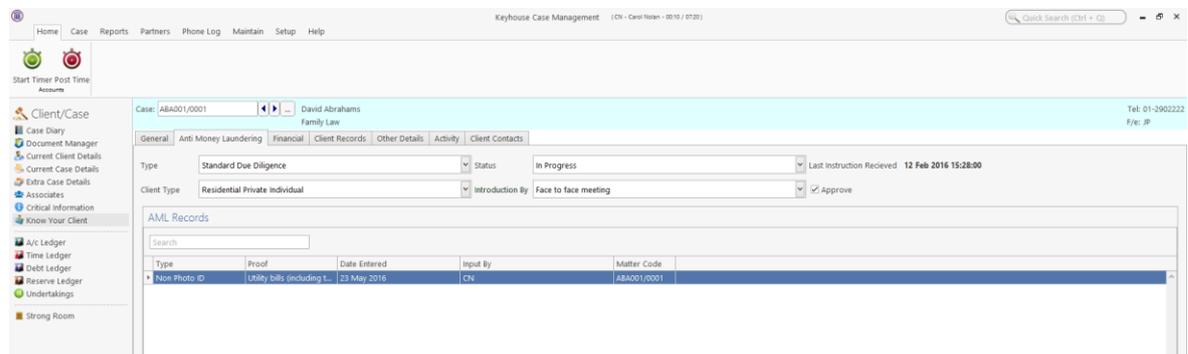
2. Then select whether the document is **Photo ID** or **Non Photo ID**.
3. **Navigate** to the location where the document is stored and select the required document. Click **Open**.



Select the **type** of ID supplied

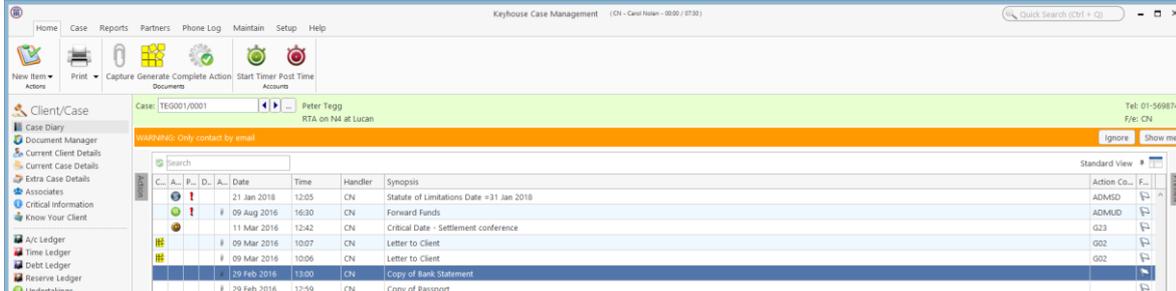


- The action will now appear on both the **Anti-Money Laundering** screen and the **Case Diary** as a completed action.

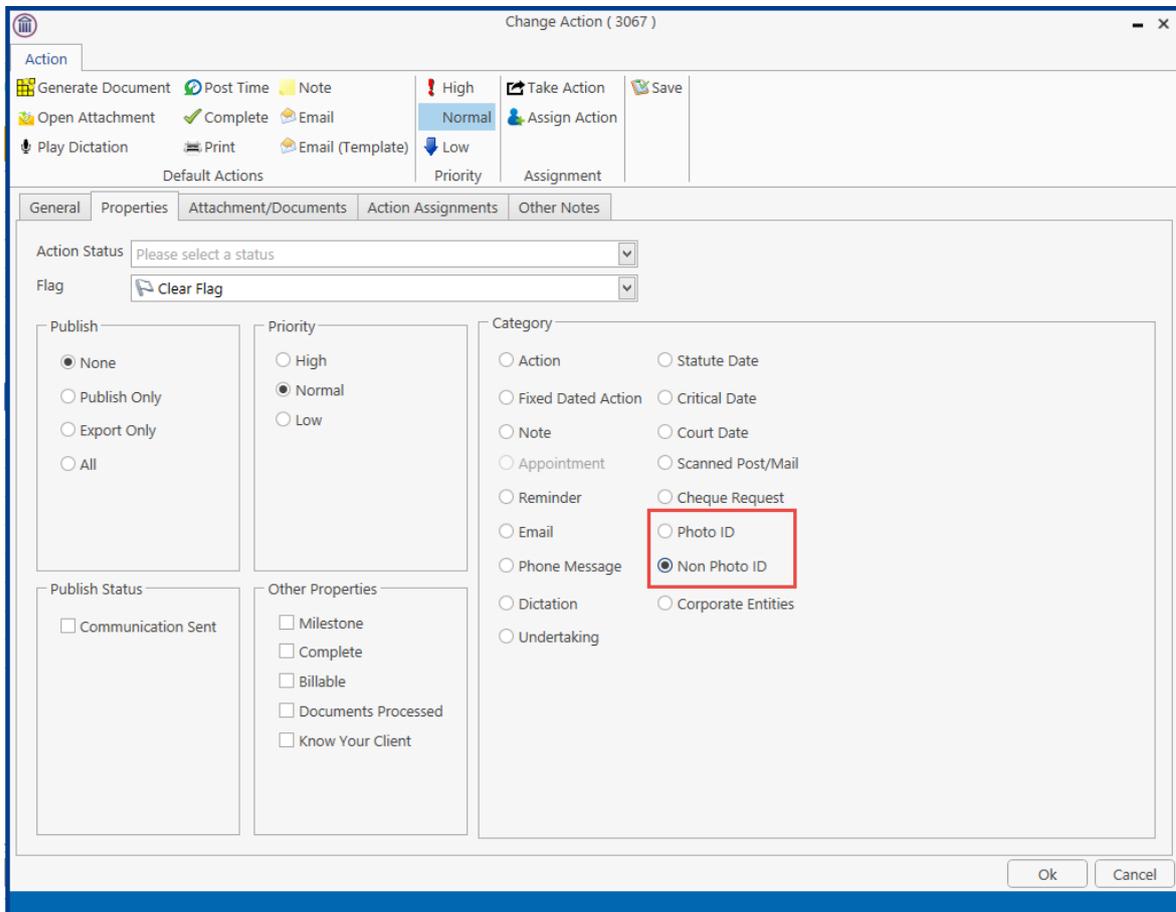


Adding Existing Documents to AML Screen

1. Go to the **Case Diary**.
2. Select the **Action** required.

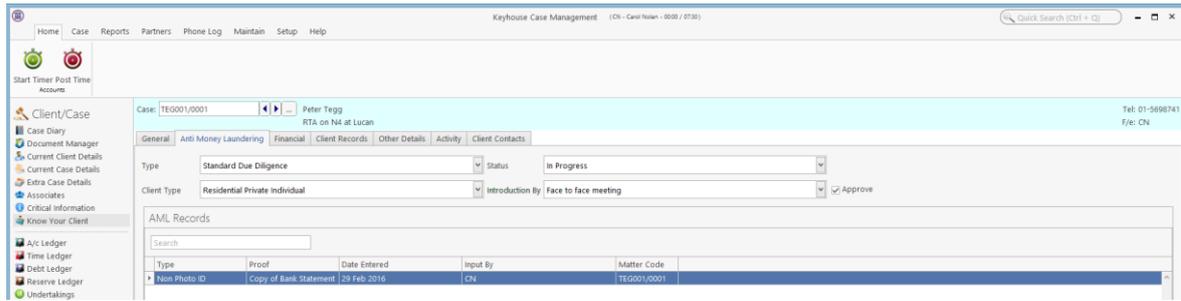


3. Right click and select Edit.
4. Click on the Properties Tab and tick Photo ID or Non Photo ID, then OK



5. Complete the action.

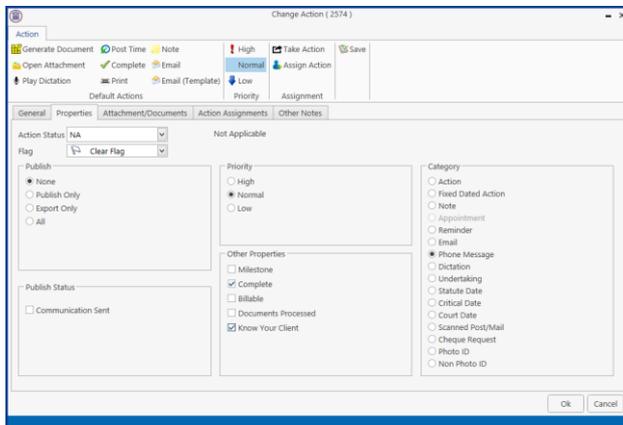
6. Return to the AML Screen on Know Your Client to see the document.



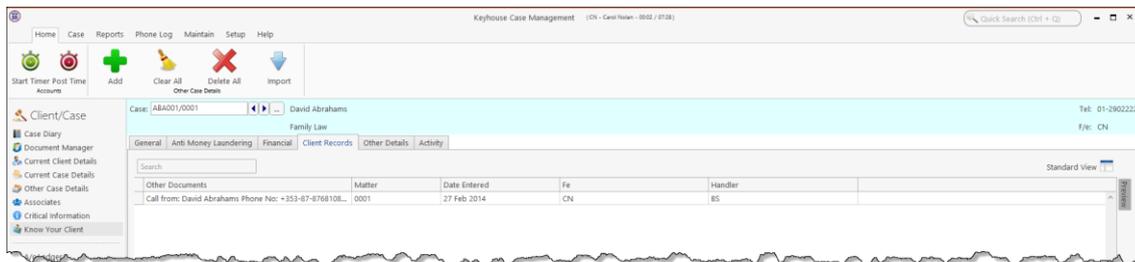
Client Records

Documents related to the client rather than to a specific matter can be added here e.g. a Service Level Agreement. This will ensure visibility regardless of the matter selected. In order for this to happen, the action must be edited and then flagged to appear in Know Your Client.

1. Open the Action and select the **Properties** Tab.
2. In the **Other Properties** Box tick **Know Your Client** and click OK.



3. Return to the **Client Records** Tab on the **Know Your Client** Screen to see the action.



Other Details

This screen shows client specific forms that are made up of UDF Fields. These forms hold information about the client that is not stored in other locations e.g. Credit Rating. To create a Client Other Details form see the Administrator User Manual.

The screenshot shows a software interface for 'Other Details'. At the top, there is a header bar with 'Case: FLY001/0001', navigation arrows, and the client name 'Jack Flynn' and address 'Sale of 10 Rose Lawn, Blanchardstown, Dublin 17'. Below this is a tabbed menu with 'General', 'Anti Money Laundering', 'Financial', 'Client Records', 'Other Details', 'Activity', and 'Client Contacts'. The 'Other Details' tab is active, and a dropdown menu shows 'Form Credit Check'. The main area contains two input fields: 'Enter the Client's Credit Rating' and 'Enter the Risk', each with a dropdown arrow and a search icon.

Client Contacts

This screen will give all contact information for the Client. Contacts may be added, edited or deleted on this screen by clicking on appropriate button at the bottom of the screen.

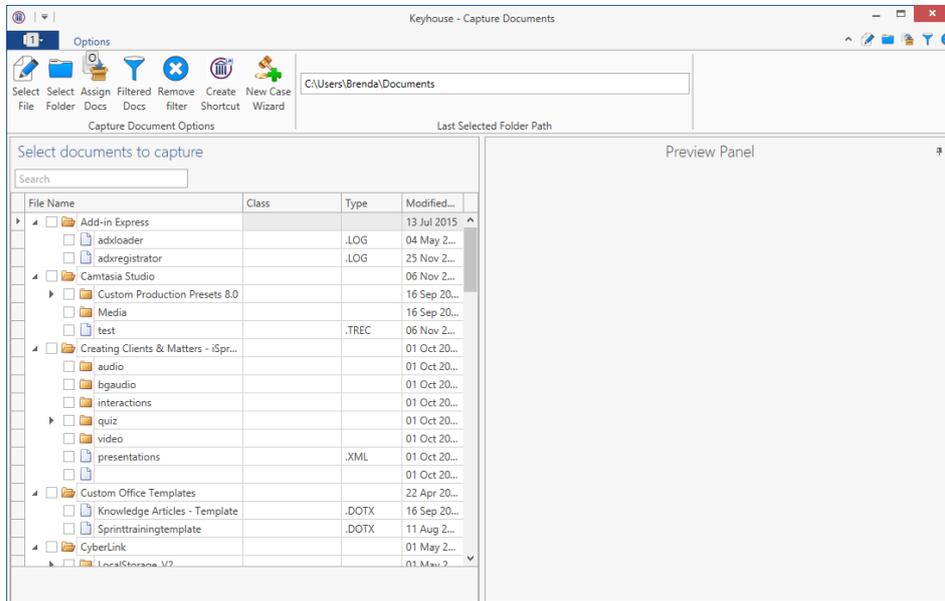
The screenshot shows the 'Client Contacts' screen. At the top, it displays 'Case: BOBUS/0002', 'Bing Oil Industries Business Banking', and 'Advice re Agreement'. The 'Client Contacts' tab is selected. A table lists contact information for two individuals. At the bottom right of the table, there are three buttons: 'Insert', 'Change', and 'Delete', which are highlighted with a red box.

Initials	Full Name	Home Phone	Work Phone	Mobile	First Name	Surname	Salutation	PPS Number	Title	Address	Email Address	DOB	Marriage Date	Occupation	Date of Death	Marital Status
Mr	Fred Ryan		01-665-8700		Fred	Ryan	Fred		F R		Fred.Jones@b...					
Ms	Cathy Tyler		01-665-7801		Cathy	Tyler	Cathy		C T		cathy.tyler@b...					

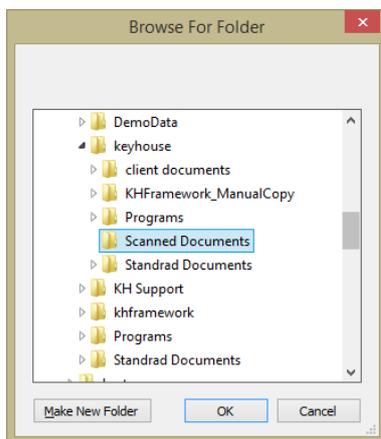
Chapter 8: Keyhouse Capture

How to Capture a Folder

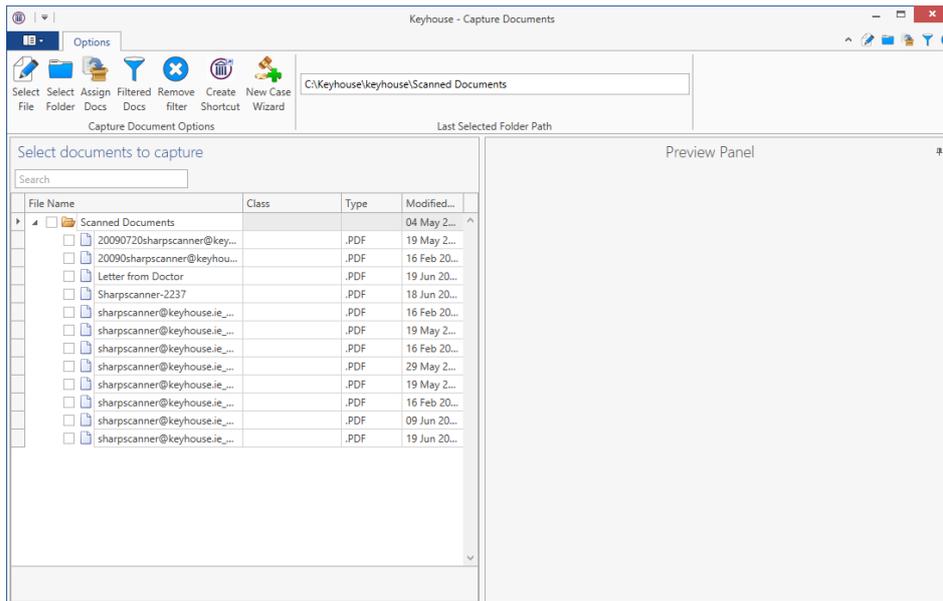
1. Click **Capture** button on the Home tab in either the Case Diary or Task List. The following screen will appear.



2. Click **Select Folder**  and navigate to the Folder where the document/documents are stored and click OK.



3. The **Capture Documents** screen will appear, listing the contents of the folder.



4. Click on each document in turn to preview and rename if necessary.

NOTE: The following symbols cannot be used when renaming documents: | \ / < > ; * ; *

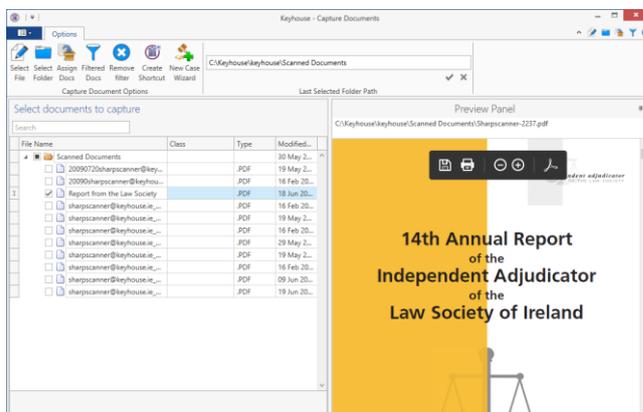


Tip: To filter a column heading:

- Move your cursor over the column heading a pin will appear.
- Click on the **Pin** for a list of filters available.
- Select the required filter.
- Click **Remove filter** on the Options tab to display all documents.



5. Tick the box to the left of the file name.



NOTE: Documents can be imported individually or in groups by ticking the box to the left of the document name. Alternatively, the contents of a folder can be imported together by ticking the box to the left of the folder name.



Tip: To exclude a file remove the tick.

To view the contents of a file click on the view button  to the right of the tick box.

6. To capture the folder into a new case, use the **New Case Wizard** on the Options tab to set up the case first. For further information on how to create a new case see Chapter 3.
7. Click **Assign Docs** to assign the documents in the folder to a Case, Handler and Action. The following screen will appear.

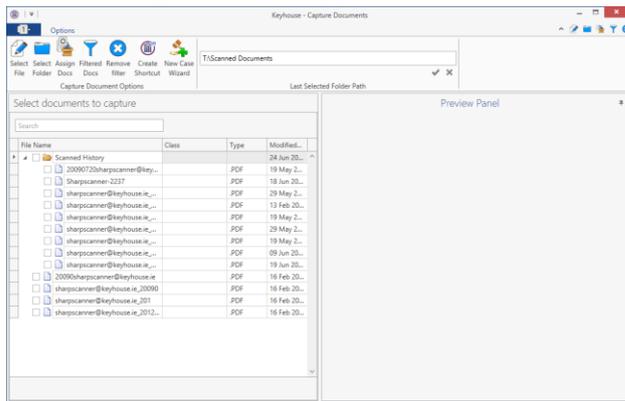
- Case:** The Case will default to the current case. To select a different case, click the browse button; this will bring up a matter list. Select the required case.
- Handler:** The Handler will default to the current handler; select an alternative from the drop-down list, if required.
- Action:** Click the browse button for a list of incoming actions will appear. **Select** the required action.
- Description:** Input a **description** in the Description box; if you leave this blank the document name will become the description. This is used primarily when importing multiple documents as a single action.
- Capture Settings:** Check the boxes as appropriate to:
- delete the Captured documents from original location;
 - import documents to a single action (the alternative is that each document will get its individual action in the case diary);
 - mark as complete the action into which the document is to be captured;
 - mark the document as having been generated.

 **Tip:** Click **Save Settings** to keep these settings for future documents captured.

8. The files will then appear in the case diary as a single action or multiple actions.

How to Capture a File

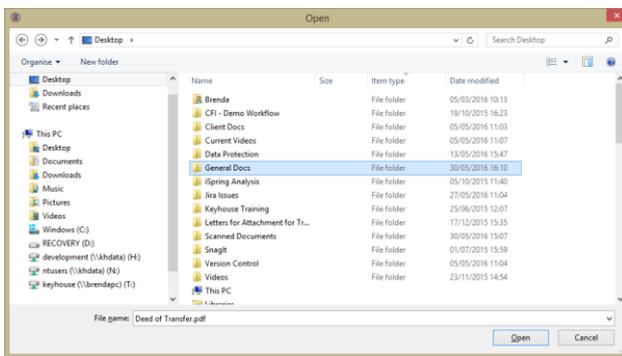
1. Click **Capture** on the Home tab in either the Case Diary or Task List. The following screen will appear.



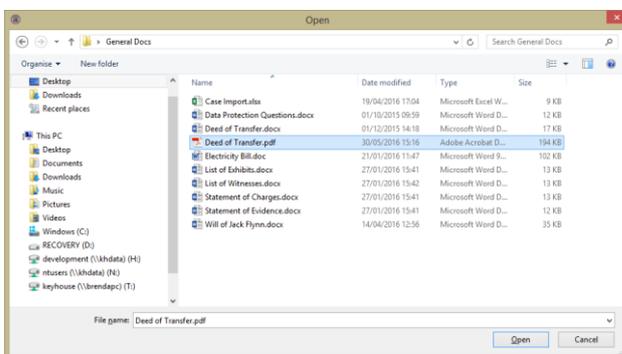
2. Click **Select File**.



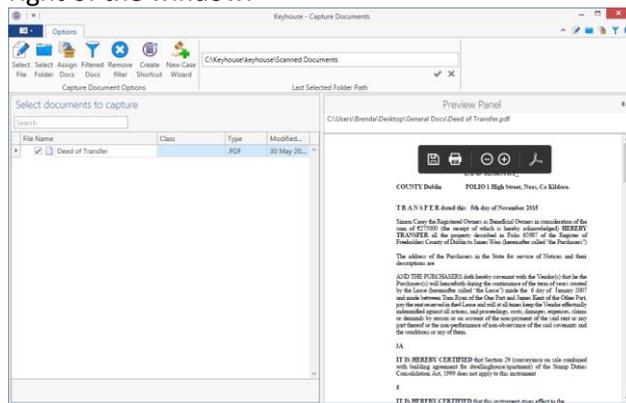
3. A Windows **Open** dialogue box will appear. Browse and locate the file that is to be captured.



4. Click on the file and click on the **Open** button. The chosen document will be listed on the left-hand side of the **Capture Documents** window.



5. Tag the document to be captured. There will be a Preview of the document in the Preview Panel, on the right of the window.



6. If the document is to be captured into a new case use the **New Case Wizard** (on the right of the Options tab) to set up the case first. For further information on how to create a new case see Chapter 3.
7. To assign the captured document to a Case, Handler and Action, click **Assign Docs**. The following window will appear.

Provide the following information:

- Case:** The Case will default to the current case. To select a different case, click  the browse button; this will bring up a matter list. Select the required case.
- Handler:** The Handler will default to the current handler; select an alternative from the drop-down list, if required.
- Action:** Click the browse button for a list of incoming actions will appear. **Select** the required action.
- Description:** Input a **description** in the Description box; if you leave this blank the document name will become the description.
- Capture Settings:** Check the boxes as appropriate to:
- delete the Captured documents from original location;
 - import documents to a single action (the alternative is that each document will get its individual action in the case diary);
 - mark as complete the action into which the document is to be captured;
 - mark the document as having been generated.



Tip: Click **Save Settings** to keep these settings for future documents captured.

8. When finished click **OK**.
9. The files will appear in the case diary as a single action or multiple actions, depending on the options chosen.

Chapter 9: The Template Library

The Document Library allows the user to browse through case plans and to view precedent documents prior to generating. This is helpful if the user is not familiar with the case plan and its documents.

How to Search for precedent documents

1. Click on **Search/Open**.
2. Click on **Template Library** the following screen will appear.

Work Flow	Document Code	Document Name	Document Class	Document Description
Circuit Court Civil Bill Procedure	CCBC101B	Letter informing Appellant of adjourned date	LTR	Letters/Interparty Correspondance
Circuit Court Civil Bill Procedure	CCBC101C	Letter informing Witness of adjourned date	LTR	Letters/Interparty Correspondance
Circuit Court Civil Bill Procedure	CCBC102AB	Letter to Counsel enclosing fees	LTR	Letters/Interparty Correspondance
Circuit Court Civil Bill Procedure	CCBC103F	Letter enclosing request for Judgement by Default of Defence	LTR	Letters/Interparty Correspondance
Circuit Court	LIT088E	Letter to County Registrar to stamp Motion & Affidavit	LTR	Letters/Interparty Correspondance
Circuit Court	LIT090	Ltr Serving Motion on Def	LTR	Letters/Interparty Correspondance
Circuit Court	LIT091	Ltr Filing Affidavit of Service	LTR	Letters/Interparty Correspondance
Circuit Court	LIT092	Ltr Serving CB on Def Solr (CC)	LTR	Letters/Interparty Correspondance
Circuit Court	LIT093	Ltr Chase Def Solicitors	LTR	Letters/Interparty Correspondance
Circuit Court	LIT094	Ltr to Client encl Notice of Part	LTR	Letters/Interparty Correspondance
Circuit Court	LIT095	Ltr Consenting to Defence by Def (CC)	LTR	Letters/Interparty Correspondance
Circuit Court	LIT096	Ltr to Solrs encl Reply Partic (CC)	LTR	Letters/Interparty Correspondance
Circuit Court	LIT103	Ltr Barrister encl Brief	LTR	Letters/Interparty Correspondance

3. **Input** a key search word/s in the **Search Box**. The search results will update as you type.
4. A list of precedent documents matching the criteria will be listed in the screen below.

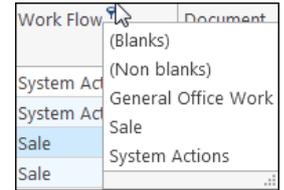
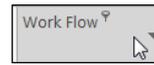
How to sort Column Headings in the Template Library

1. Click on a **column heading** to sort by that heading e.g.  Work Flow
2. To return to the previous listing order, right-click in the column heading and select **Clear Sorting** from the pop-up menu.

	Sort Ascending
	Sort Descending
	Clear Sorting
	Group By This Column
	Show Group Panel
	Show Column Chooser
	Best Fit
	Best Fit (all columns)
	Filter Editor...

How to apply a filter

- To apply a filter move your mouse over the **column heading** until a **Pin** appears; click on it for a list of terms by which the records may be filtered.
- Click on the **filter** required.
- To remove the filter, select **(All)** from the filter drop-down menu (alternatively, right-click the column heading and select **Clear Filter** from the pop-up menu).



Chapter 10: Conflict Search

What is a Conflict Search?

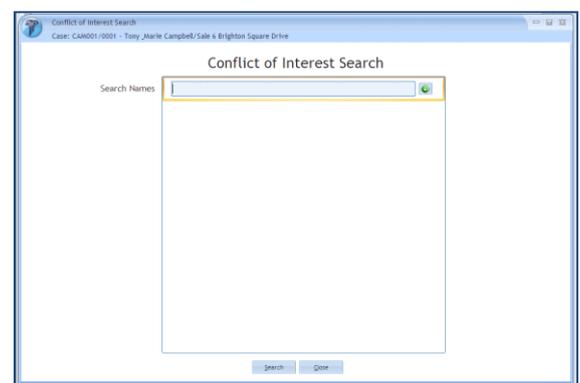
A conflict search is a search designed to alert the user to any potential conflicts of interest; for example if the firm is being asked to act for somebody who is/was an opposing party in previous or continuing proceedings. The fields searched are Client Name, Spousal Name, Case Associate Name, all PPS numbers and telephone numbers.

How to do a Conflict Search

- If the current case is not the one on which you wish to do the Conflict Search, click on **Search/Open** on the Navigation bar and search for the required case.

Code	Last Accessed	File Colour	Name	Description
FLY001/0001	27 Jul 2015 14:35:20		Jack Flynn	Sale of House at: 4 The Mews, Rathfarn...
FLY001/0002	27 Jul 2015 14:35:15		Jack Flynn	Purchase of 16 The Haywain, Terenure,...
ABA001/0002	27 Jul 2015 14:34:55		David Abraha...	HIPS Negligence - October 2010
TJF001/0001	27 Jul 2015 14:28:45		TJ Fox	Outstanding debt to PTSB Bank.
BLA001/0001	27 Jul 2015 14:24:39		Gordon T. Bla...	RTA Walkinstown Crossroads, G. Black
BLA001/0002	27 Jul 2015 14:24:32		Gordon T. Bla...	2 Trinity Close, Rathgar, Dublin 6
BRE001/0001	27 Jul 2015 14:18:02		Mike Breeze	Broken left leg.
BES001/0001	21 Jul 2015 16:31:54		Business Time...	Lease of Unit 33, Eastgate Avenue, Dubli...
AAA001/0001	21 Jul 2015 12:55:18		AAA Securitie...	Landlord Dispute
ABA001/0001	21 Jul 2015 11:52:18		David Abraha...	Family Law
SIM001/0001	21 Jul 2015 09:53:43		Bart Simpson	Sale of House at: 4 The Mews, Rathfarnh...
BRO001/0001	21 Jul 2015 08:44:21		Kevin Browne	Sale of 78 Somerset Road, Ealing, Lond...
TJF001/0000	16 Jul 2015 16:23:06		TJ Fox	Document matter

- Click on **Conflict Search** icon on the Case tab.
- A Conflict of Interest Search window will appear.



4. The types of information you can search for are the Name, PPS number, telephone number or address.

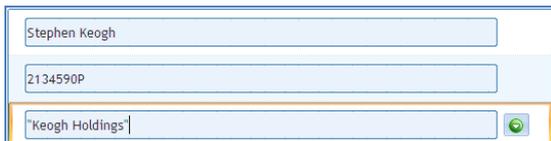
- a. Click in the search box, **input** the first search criteria e.g. Stephen Keogh



This will search for Stephen **or** Keogh anywhere.

To search for an **exact phrase** input the phrase in **quotes** e.g. "Stephen Keogh"

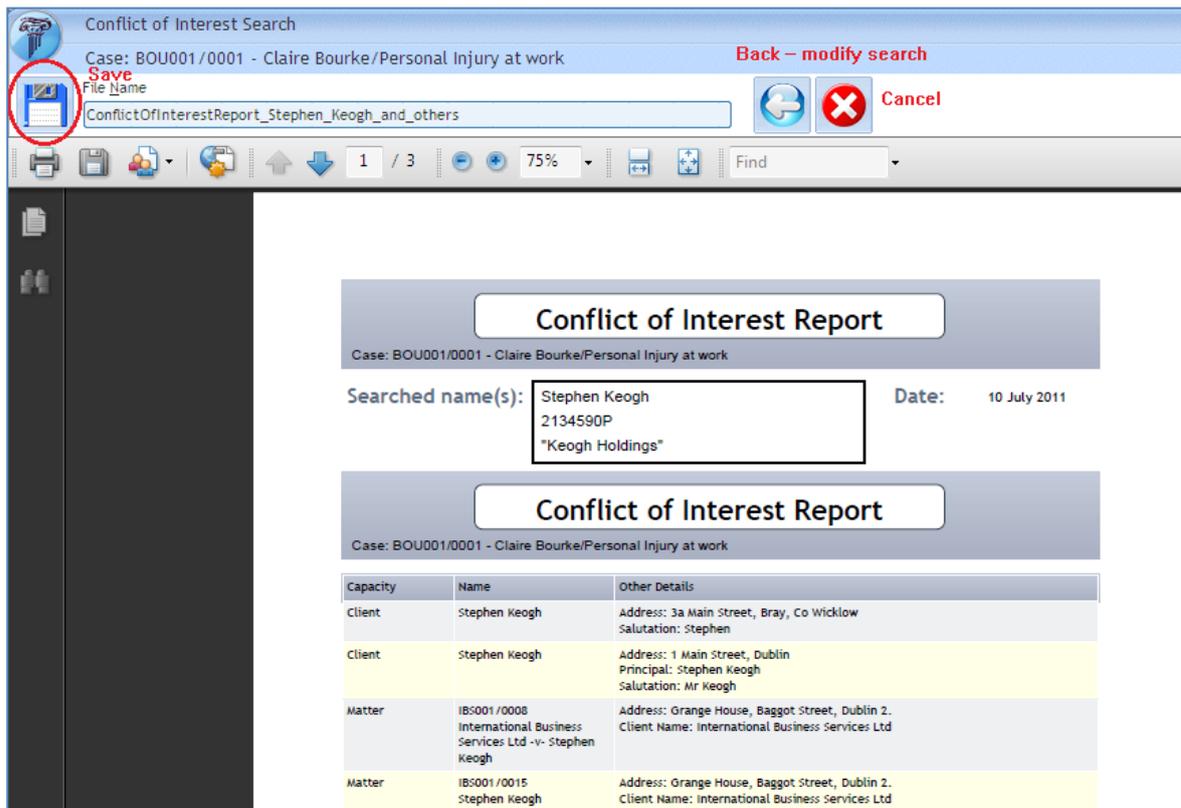
- b. To add a second criteria click on the **down arrow**  Input the second search criteria. Repeat this process for a 3rd, 4th etc. See the following example



This will search for Stephen or Keogh anywhere **and** 2134590P anywhere **and**

The exact phrase "Keogh Holdings" anywhere.

5. Click on the **Search button** at the bottom of the window.
6. A report will be generated listing any matches.
7. To save the results as an action in the case diary, click on **Save**.



Conflict of Interest Search

Case: BOU001/0001 - Claire Bourke/Personal Injury at work

Back – modify search

Save

File Name

ConflictOfInterestReport_Stephen_Keogh_and_others

Cancel

1 / 3 75% Find

Conflict of Interest Report

Case: BOU001/0001 - Claire Bourke/Personal Injury at work

Searched name(s): Stephen Keogh
2134590P
"Keogh Holdings"

Date: 10 July 2011

Conflict of Interest Report

Case: BOU001/0001 - Claire Bourke/Personal Injury at work

Capacity	Name	Other Details
Client	Stephen Keogh	Address: 3a Main Street, Bray, Co Wicklow Salutation: Stephen
Client	Stephen Keogh	Address: 1 Main Street, Dublin Principal: Stephen Keogh Salutation: Mr Keogh
Matter	IBS001/0008 International Business Services Ltd -v- Stephen Keogh	Address: Grange House, Baggot Street, Dublin 2. Client Name: International Business Services Ltd
Matter	IBS001/0015 Stephen Keogh	Address: Grange House, Baggot Street, Dublin 2. Client Name: International Business Services Ltd

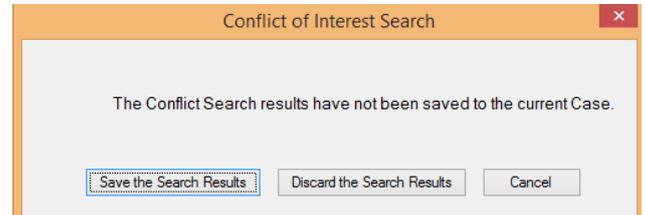
See the following example.

					Date	Time	Handler	Synopsis
					10 Nov 2014	20:55	ADM	Conflict Search

 **NOTE:** The saved action is assigned to the Fee Earner of the case for completion. The results can be viewed at any time by opening the report.

8. Click on **Cancel** to cancel the search at any time. The following message prompt will appear.

- a. To save click on **Save the Search Results**.
- b. To discard click on **Discard the Search Results**.
- c. Click **Cancel** to cancel this message prompt and return to the conflict of interest report.



Chapter 11: The Strong Room

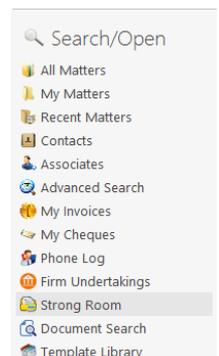
What is the Strong Room used for?

The Strong Room is used to keep track of the locations of physical items such as wills, deeds, tapes, share registers etc. it records details of the physical storage location of the item, which client owns the item and which case it is connected to.

The Strong Room also keeps a record of the date the item has been withdrawn and when it has been returned and by whom. The history of the item is recorded for tracking purposes.

How to Search for an Item

1. Click on **Search/Open** on the Navigation panel. (The Strong Room for the current case may be accessed via the Navigation panel in Client/Case.)
2. Click on **Strong Room** on the Navigation panel. The following screen will appear listing all items in your strong room.



Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date
0000123131	TJ001/0001	DEE	TJ Fox/Outstanding debt to PTSB Bank.	I	O	
DEE	TAR001/0001	DEE	George Tarrant/Deeds for Commercial Premises	I	O	30 Jun 2014
0000123128	RVA002/0001	WIL	Margaret Ryan/Will which included additions for beneficiaries	I		18 Jun 2014
test	OWE001/0001	DEE	Peter Owen/Test Deeds for Section 23 Property	I	O	30 Jun 2014
FLY001/101	FLY001/0001	DEE	Jack Flynn/Deeds for house at 4 The Mews, Rathfarnham.	I	O	
FLY001/100	FLY001/0001	COM	Jack Flynn/Company Seal for Flynn & Co	I	O	31 Dec 2015
0000123126	FEN001/0001	WIL	Richard Fennel/Will	I		18 Jun 2014
LEA1811	EVE001/0003	LEA	Ever Green Insurance Corporation/Leasehold Agreement for Turf Rights	I	O	18 Jun 2014
D1234	CUL001/0001	DEE	Ann Marie Cullen/Deeds for 101 Dun Emer Drive, Dublin 6	I		30 Aug 2014
CDA1111	ABB001/0004	DEE	George J Abbott/Title Deeds - Code CDA 1111	I	O	08 Aug 2014
ABB0010001	ABB001/0001	DEE	George J Abbott/Title Deeds for second property	I	O	18 Jun 2014

3. **Input** the search terms. A list of items matching your criteria will be displayed in the window below.

Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date
ABC000	ABB001/0001	PAP	George J Abbott/Personal Papers	I		
DEE	TAR001/0001	DEE	George Tarrant/Deeds for Commercial Premises	I	O	30 Jun 2014
ABB0010001	ABB001/0001	DEE	George J Abbott/Title Deeds for second property	I	O	18 Jun 2014
CDA1111	ABB001/0004	DEE	George J Abbott/Title Deeds - Code CDA 1111	I	O	08 Aug 2014

4. Click **Cancel** to clear the search results. 



Tip: You can sort column headings by click on the heading.

How to Add a File/Item to the Strong Room

1. If the current case is not the case in respect of which you wish to add an item to the Strong Room, Click on **Search/Open** on the navigation panel and open the required case.
2. Then click **Strong Room** on the Navigation panel.
3. Click on the **Add File** icon on the Home tab. A screen with the title **Strong room — Add new File** will appear.

Fields marked with an asterisk are required.

Needs Attention: Tick if the item needs to be checked.

Item Type: Select the Item Type from the drop-down list.

Item Code: **Input** an item Code or if left blank, the system will generate a code.

Client Code: See also Matter Code below.

Matter Code: If the code of the current matter is not displayed, or you wish to select a different matter, use the browse button to browse the matter list.

Client Name: If the name of the Client is not displayed, or you wish to select a different client, use the browse button to browse the client list.

Description: Uses the Matter Description

Description: **Input** a description of the item.

Location: Select a storage location from the drop-down list.

Box No: Likewise, select a Box number from the drop-down list.

Search Code: Input a search code

Fee Earner: Use the drop-down list to select the Fee Earner with responsibility for the item.

Entry Date: The date on which the item was entered on the system: normally today's date.

Destroy Date: The date, if any, on which the item is to be destroyed.

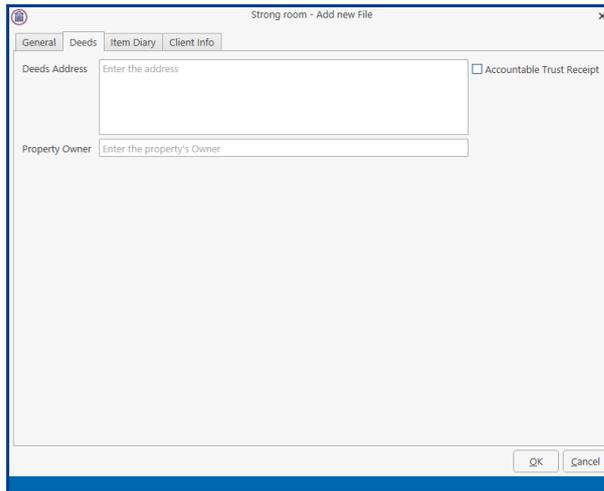
Open/Closed: This will **default** to open.

4. Click **OK** to add the item to the strong room list.

NOTE: The tabs at the top of the screen will vary depending on the Item Type chosen.

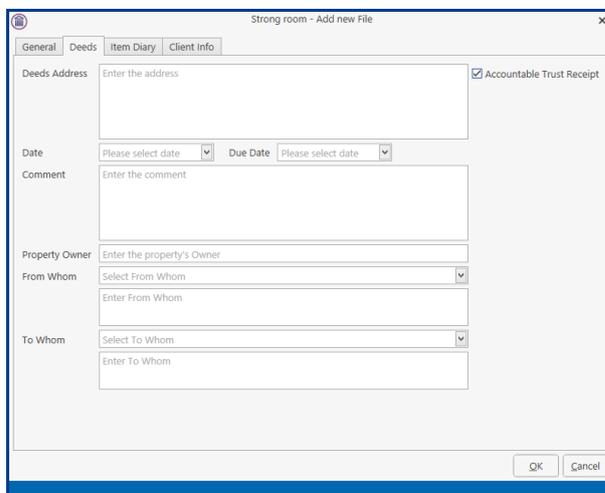
Entering Deeds in the Strong Room

1. Click to the **Deeds** tab.



The screenshot shows a dialog box titled "Strong room - Add new File" with a close button (X) in the top right corner. The "Deeds" tab is selected, and the "General" tab is also visible. The "Deeds Address" field is active, with the placeholder text "Enter the address". To the right of this field is an unchecked checkbox labeled "Accountable Trust Receipt". Below the address field is the "Property Owner" field with the placeholder text "Enter the property's Owner". At the bottom right of the dialog are "OK" and "Cancel" buttons.

2. Enter the **address** for the Deeds.
3. If the Deeds are being held on **Accountable Trust Receipt**, tick the Box.



The screenshot shows the same dialog box, but now the "Accountable Trust Receipt" checkbox is checked. The "Deeds Address" field is still active. Below it are two date fields: "Date" and "Due Date", both with "Please select date" dropdown menus. Below the date fields is a "Comment" field with the placeholder text "Enter the comment". Below the comment field is the "Property Owner" field with the placeholder text "Enter the property's Owner". Below the property owner field are two "From Whom" fields, each with a "Select From Whom" dropdown menu and a text input field. Below the "From Whom" fields are two "To Whom" fields, each with a "Select To Whom" dropdown menu and a text input field. At the bottom right of the dialog are "OK" and "Cancel" buttons.

4. Enter the required information.
5. Click OK.

Entering Wills in the Strong Room

1. Click to the **Wills** tab.

Strong room - Add new File

General | **Wills** | Item Diary | Client Info

Testator Enter the testator
Enter the testator address

Will Date Please select date

Est Estate 0.00

Date of death Please select date

Executor 1 Enter the executor 1
Enter the executor 1 address

Executor 2 Enter the executor 2
Enter the executor 2 address

Executor 3 Enter the executor 3
Enter the executor 3 address

Executor 4 Enter the executor 4
Enter the executor 4 address

OK Cancel

2. Enter the **Testator** and the **Executors** and the date of the Will.
3. The **Date of death** and the **value of the estate** can also be added.
4. Click OK.

Attach a Document to a Strong Room Entry

A copy of a documents can be attached to the Strong Room e.g. a signed copy of a will. This will make the document easier to find in the matter.

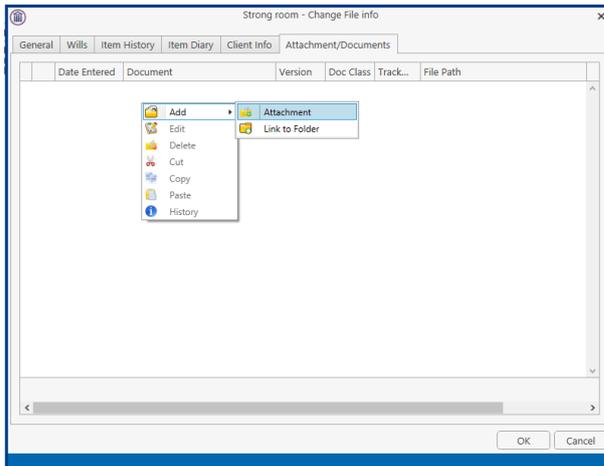
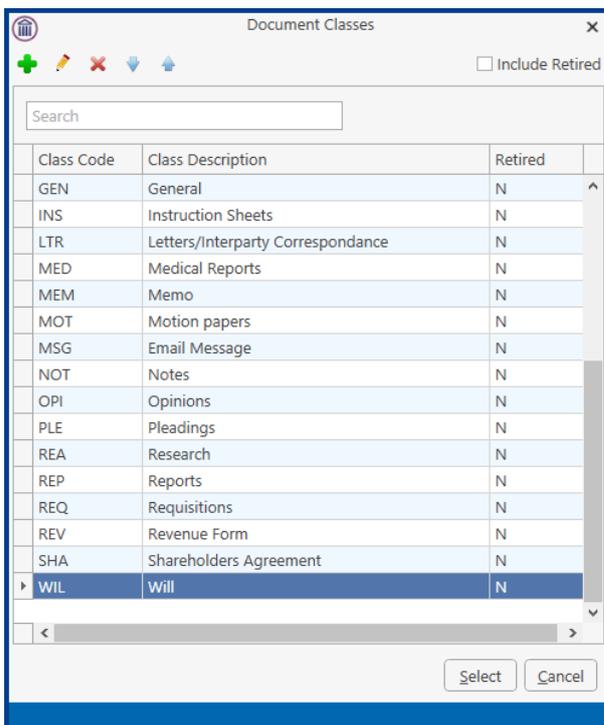
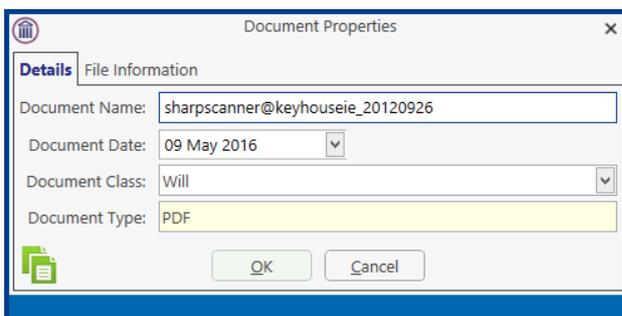
1. **Scan** the document on to the computer.
2. Locate the entry in the **Strong Room** either in the Strong Room on the Search Open Screen or in the Strong Room for the matter.
3. Open the Strong Room Entry by clicking **Change File**.
4. Select the **Attachment/Document** Tab.

Strong room - Change File info

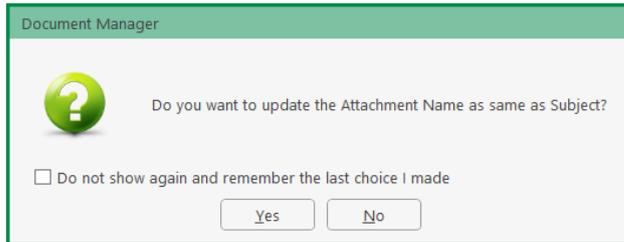
General | Wills | Item History | Item Diary | Client Info | **Attachment/Documents**

Date Entered	Document	Version	Doc Class	Track...	File Path

OK Cancel

5. Right click and select **Add** and then select **Attachment**6. **Navigate** to the file location e.g. Scan Folder and select the document.7. Click **Open**. The following dialog box will appear.8. Select the appropriate **Document Class** and click Select.9. It may be necessary to **rename** the document if it wasn't renamed **before** it was brought into Keyhouse. Right click on the item and select Edit. The following dialog box will appear.

10. Enter the **correct** name for the document and change the document class if required.
11. Click **OK**. You may see the following dialog box.



12. Click Yes if you want the name of the document and action in the Case Diary to be the same.
13. The document will now be visible in both the **Case Diary** and **Document Manager** as well as the Strong Room.

How to Withdraw an Item

1. Open the **Strong Room** screen, search for and select the item you want to withdraw.
2. Click on the **Withdraw file** icon on the Home tab.

 **Note** if the Withdraw file icon is greyed out the item is already checked out.

3. The system will ask for your **password**; input your **username** and **password**.
4. A Withdraw File dialogue box will appear.

Provide the following information:

For Who:

Select the person to whom the item is checked out from the drop-down list. Alternatively tick the Withdraw Permanently if the documents are being released.

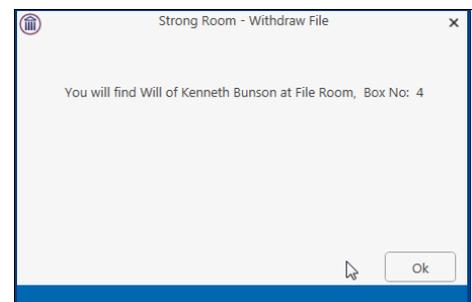
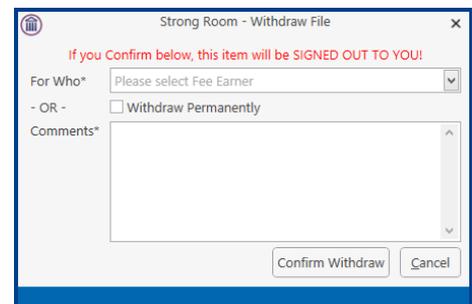
 **Note** if you tick the Withdraw Permanently it will not be possible to replace the document. A new entry will need to be created.

Comment:

Input a comment, e.g. why the item is being withdrawn.

 **Note** the item will be signed out to you.

5. Click **Confirm Withdrawal**. The following screen will appear telling you where to find the item.
6. Click **OK**.



How to Replace/Return an Item

1. Open the **Strong Room** screen, search for and select the item you want to replace.
2. Click on the **Replace File** icon on the Home tab.
3. The following Replace File dialogue box will appear.

Note if the **Replace File** tool is greyed out the item is already checked in.

4. Select the **physical location**, e.g. Box 2, to which the item is being returned.
5. Enter the **Box No** if required
6. Click **OK**. You will see a message asking you to place the item in the selected location.
7. Click **OK**.

Delete a file

1. Select the item to be deleted.
2. Select Delete File from the Ribbon at the top of the page.

How to view the History on a file/item

1. If the **Strong Room** is not shown on the Navigation panel, click on **Search/Open**.
2. Then click on **Strong Room** on the Navigation panel to show the following screen listing all items in your strong room.

Attn	ATR	Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date
		ABC000	ABB001/0001	Papers	George J Abbott/...	I	O	30 Jun 2014
		DEE	TAR001/0001	Deeds	George Tarrant/...	I	O	18 Jun 2014
		ABB0010001	ABB001/0001	Deeds	George J Abbott/...	I	O	01 Jun 2020
		12245		Backup T...	Friday's Backup	I	O	31 Oct 2014
		AAA0010001	AAA001/0001	Wills	AAA Securities LL...	I	O	31 Oct 2014
		AAA0010001	AAA001/0001	Wills	AAA Securities LL...	I	O	31 Oct 2014
		123123	AAA001/0001	Wills	AAA Securities LL...	O	O	
		test	OWE001/0001	Deeds	Peter Owen/Test...	I	O	30 Jun 2014
		LEA1811	EVE001/0003	Lease A...	Ever Green Insur...	I	O	18 Jun 2014
		0000123124	AAA002/0002	Compan...	AAA Worldwide...	I	O	18 Jun 2014
		0000123125	AAA002/0002	Papers	AAA Worldwide...	I	O	18 Jun 2014
		0000123126	FEN001/0001	Wills	Richard Fennell/...	I	O	18 Jun 2014
		0000123127		Backup T...	Year End Backup...	I	O	18 Jun 2014
		D1234	CLU001/0001	Deeds	Ann Marie Cullen...	I	O	30 Aug 2014
		0000123128	RVA002/0001	Wills	Margaret Ryan/...	I	O	18 Jun 2014
		0000123129	AAA001/0001	Compan...	AAA Securities LL...	I	O	19 Jun 2014
		0000123130		Backup T...	Year end backup...	I	O	19 Jun 2014
		CD0A1111	ABB001/0004	Deeds	George J Abbott/...	I	O	08 Aug 2014
		0000123131	BLA001/0001	Deeds	Gordon T. Black/...	I	O	
		0000123132	SAR002/0001	Deeds	Kenneth Bunson/...	I	O	
		0000123134		Deeds	Jane Doe - Deeds	I	O	
		0000123135		Wills	Will for Jane Doe...	I	O	

3. **Search** for the item required and select it.

-  **Note** to add the Withdrawal Comment to the grid, see the section on Creating User Views in Chapter 18 – Personalise your Keyhouse (p. 176).

4. Click on the **History Tool** on the Home tab. The following screen will appear showing the history of the item.



Strong room - History

Item History Attachment/Documents

Search

By Who	For Who	Out Date	Out Time	In Date	In Time	Comment	Item Code
Brian Sweeney	Brian Sweeney	18 Jun 2014	17:05:06	18 Jun 2014	17:09:50	Work on the file	0000123125
Brian Sweeney	Martina Wint...	18 Jun 2014	17:07:06	18 Jun 2014	17:09:50	Working on the file	0000123125
Brian Sweeney	Brian Sweeney	18 Jun 2014	17:09:29	18 Jun 2014	17:09:50	working on the file	0000123125
Brian Sweeney	Brian Sweeney	18 Jun 2014	17:10:13			today	0000123125

5. Click Cancel to exit this screen.

Working with Documents Only

Add a file without using a Case

- Click to **Search/Open** and select Strong Room from the Navigation Panel.
- A list of all documents held not related to a specific case/client will be listed.



Keyhouse Case Management (CN - Carol Nolan - 8201 / 8738)

Home Case Reports Phone Log Maintain Setup Help

Print Add File Change File Delete File Withdraw File Request File History Diary

Search/Open

Attn	ATR	Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date
		ABC000	ABB001/0001	Papers	George J Abbott/L...	I	O	30 Jun 2014
		DEE	TAR001/0001	Deeds	George Tarrant/L...	I	O	18 Jun 2014
		ABB0010001	ABB001/0001	Deeds	George J Abbott/L...	I	O	18 Jun 2014
		12345		Backup T...	Friday 1 Backup	I	O	01 Jan 2020
		AAA0010001	AAA001/0001	Wills	AAA Securities Lt...	I	O	31 Oct 2014
		AAA0010001	AAA001/0001	Wills	AAA Securities Lt...	I	O	31 Oct 2014
		123123	AAA001/0001	Wills	AAA Securities Lt...	O	O	
		test	OWE001/0001	Deeds	Peter Owen/Tes...	I	O	30 Jun 2014
		EA1811	EVE001/0003	Lease A...	Ever Green Insur...	I	O	18 Jun 2014
		0000123124	AAA002/0002	Compan...	AAA Worldwide...	I	O	18 Jun 2014
		0000123125	AAA002/0002	Papers	AAA Worldwide...	I	O	18 Jun 2014
		0000123126	FEN001/0001	Wills	Richard Fennell/...	I	O	18 Jun 2014
		0000123127		Backup T...	Year End Backup...	I	O	18 Jun 2014
		D1234	CLU001/0001	Deeds	Ann Marie Cullen...	I	O	30 Aug 2014
		0000123128	RVA002/0001	Wills	Margaret Ryan/L...	I	O	18 Jun 2014
		0000123129	AAA001/0001	Compan...	AAA Securities LL...	I	O	19 Jun 2014
		0000123130		Backup T...	Year end backup...	I	O	19 Jun 2014
		CDA1111	ABB001/0004	Deeds	George J Abbott/L...	I	O	08 Aug 2014
		0000123131	BLA001/0001	Deeds	Gordon T. Black/L...	I	O	
		0000123133	BAR002/0001	Deeds	Kevin Barrett/Sa...	I	O	
		0000123134		Deeds	Jane Doe - Deeds	I	O	
		0000123135		Wills	Will for Jane Doe...	I	O	

- A list of all documents held including documents not related to a specific case/client will be listed.
- Complete the form as detailed in Add a file to a Case (p. 114). However, you will not be able to add a Client/Matter details.

5. It will appear in the list of documents without a Matter Code

Attn	ATR	Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date
		ABC000	ABB001/0001	Papers	George J Abbott/Personal Papers	I		
		DEE	TAR001/0001	Deeds	George Tarrant/Deeds for Commerical Premises	I	O	30 Jun 2014
		ABB0010001	ABB001/0001	Deeds	George J Abbott/Title Deeds for second property	I	O	18 Jun 2014
		12345		Backup T...	Friday 1 Backup	I	O	01 Jan 2020
		AAA0010001	AAA001/0001	Wills	AAA Securities Ltd/My Will	I	O	31 Oct 2014
		AAA0010001	AAA001/0001	Wills	AAA Securities Ltd/My Will	I	O	31 Oct 2014
		123123	AAA001/0001	Wills	AAA Securities Ltd/My Will 2	O	O	
		test	OWE001/0001	Deeds	Peter Owen/Test Deeds for Section 23 Property	I	O	30 Jun 2014
		LEA1811	EVE001/0003	Lease A...	Ever Green Insurance Corporation/Leasehold Agreement for Turf Rights	I	O	18 Jun 2014
		0000123124	AAA002/0002	Compan...	AAA Worldwide Removals/Company Seal	I		18 Jun 2014
		0000123125	AAA002/0002	Papers	AAA Worldwide Removals/Student Complaint File	I		18 Jun 2014
		0000123126	FEND01/0001	Wills	Richard Fennell/Will	I		18 Jun 2014
		0000123127		Backup T...	Year End Backup 2013 (SERVER01)	I		18 Jun 2014
		D1234	CUL001/0001	Deeds	Ann Marie Cullen/Deeds for 101 Dun Emer Drive, Dublin 6	I		30 Aug 2014
		0000123128	RYA002/0001	Wills	Margaret Ryan/Will which included additions for beneficiaries	I		18 Jun 2014
		0000123129	AAA001/0001	Compan...	AAA Securities Ltd/Company Seal	I		19 Jun 2014
		0000123130		Backup T...	Year end backup 2011	I		19 Jun 2014
		CDA1111	ABB001/0004	Deeds	George J Abbott/Title Deeds - Code CDA 1111	I	O	08 Aug 2014
		0000123131	BLA001/0001	Deeds	Gordon T. Black/RTA Walkinstown Crossroads, G. Black	I	O	
		0000123133	BAR002/0001	Deeds	Kevin Barrett/Sale of 1 High Street, Kells, Co Meath	I	O	
		0000123134		Deeds	Jane Doe - Deeds	I	O	
		0000123135		Wills	Will for Jane Doe - Executed 1/12/15	I	O	
		0000123136		Deeds	Mr Joe Bloggs	I	O	

6. It is also possible to see if the document are in or out the Strong Room.

NOTE: The process for withdrawing (p. 118) and Viewing the History of a document (p. 119) is the same as the process already detailed.

Chapter 12: Time Recording

Time Recording in the Case Diary

Time can be recorded in the case diary in two ways: automatically using a timer or manually using a time slip. Once time is recorded it is then posted to the Day Book and from there it is posted to the time ledger of the case. Recorded time can be used for billing, reporting and productivity tracking.

Here are the two tools available in the Case Diary for recording time.



The Timer



Manual time slips

Both tools can be found on the Home tab.

Keyhouse Case Management (C)

Home Case Reports Phone Log Maintain Setup Help

New Item Actions Print Capture Generate Complete Action Documents Start Timer Post Time Accounts

Client/Case

Case: TJF001/0001 TJ Fox

Outstanding debt to PTSB Bank.

Action	Date	Time	Handler	Synopsis
[Icon]	14 Jul 2015	17:16	ADM	Precedent Document
[Icon]	14 Jul 2015	16:44	ADM	Attendance Sheet
[Icon]	14 Jul 2015	15:52	CN	Create Vendor Instruction Sheet
[Icon]	13 Jul 2015	15:10	CN	Document2_2661_2662
[Icon]	06 Jul 2015	09:58	COM	Conflict Search
[Icon]	16 Jul 2015	15:48	CN	Email To:training TT. training - Test Attachment
[Icon]	13 Jul 2015	12:49	CN	Email To:Brenda Hartley - Outgoing Email.
[Icon]	13 Jul 2015	12:35	CN	Email To:Brenda Hartley - Outgoing Email with an Attachm
[Icon]	06 Jul 2015	11:14	CN	Draft Bill Draft Bill No: 286
[Icon]	06 Jul 2015	10:23	MK	Pass on Deeds once House is sold.

Client/Case

- Case Diary
- Document Manager
- Current Client Details
- Current Case Details
- Other Case Details
- Associates
- Critical Information
- A/c Ledger
- Time Ledger
- Debt Ledger
- Reserve Ledger
- Undertakings
- Strang Room

How to Record Time Using the Timer

The automatic timer may be launched by clicking on Start Timer on the Home tab in the Case Diary. The user can easily manage and record time for several cases and tasks. The timer has a clock which can be started and stopped for each task. From here time is updated to the day book ready for posting to the time ledger.

1. **Open** a Case in the Case Diary



2. Click **Start Timer** on the Home tab. A timer will appear displaying the current case reference.
3. The clock will **automatically** start recording. By having the box ticked the clock will follow you as you move from case to case.

4. To pause the timer click on the **clock** at the left of the timer. The clock will stop and an orange symbol will appear next to it.



5. To **resume** recording, click on the **clock** the clock will continue recording.
6. To move to another case in the case diary, search and open the case in the normal way. The timer will automatically pause the current time recording and create a new time recording for the new case and start the clock.

 **Note** If you return to a previous case in your timer list the timer will continue the previous time recording for this case.

Matter Code	Time	Client Name	Matter Details	Comment	Date
TJF001/0001	00:30	TJ Fox	TJ Fox Outstanding debt...	Dictation	27 Ju...
TJF001/0001	02:00	TJ Fox	TJ Fox Outstanding debt...	General Advi...	27 Ju...
ABA001/0002	00:03	David Abr...	David Abrahams HIPS N...		04 A...
FLY001/0002	00:04	Jack Flynn	Jack Flynn Purchase of 1...		04 A...

7. To expand the timer click on **Maximise**. 
8. To recommence a time recording for an entry already listed in your timer click on  next to case code.

 **Note** if open the case in the case diary the timer will automatically recommence the active time recording for this case.

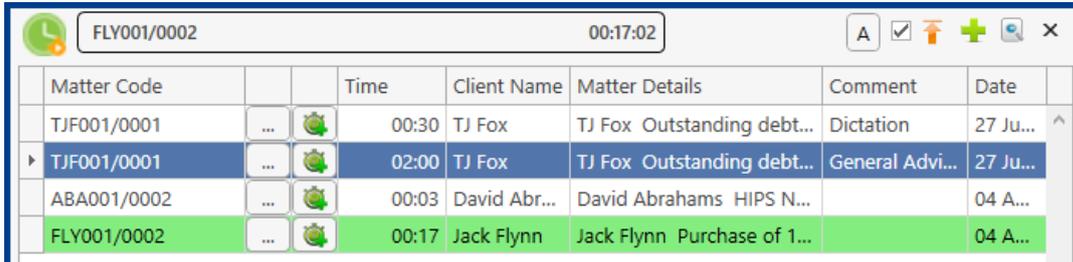
 **Note** the entry highlighted in **Green** is the active time recording.

 **Note** the A button will ensure the timer turns on automatically when you open Keyhouse

Matter Code	Time	Client Name	Matter Details	Comment	Date
TJF001/0001	00:30	TJ Fox	TJ Fox Outstanding debt...	Dictation	27 Ju...
TJF001/0001	02:00	TJ Fox	TJ Fox Outstanding debt...	General Advi...	27 Ju...
ABA001/0002	00:03	David Abr...	David Abrahams HIPS N...		04 A...
FLY001/0002	00:04	Jack Flynn	Jack Flynn Purchase of 1...		04 A...

9. You can amend the details and post this time now or later.
10. The time recording will remain in the Timer until you post it or **delete** it.

How to Post Time from the Timer

1. **Maximise** the Timer screen. The following screen will appear. 

Matter Code	Time	Client Name	Matter Details	Comment	Date
TJF001/0001	00:30	TJ Fox	TJ Fox Outstanding debt...	Dictation	27 Ju...
TJF001/0001	02:00	TJ Fox	TJ Fox Outstanding debt...	General Advi...	27 Ju...
ABA001/0002	00:03	David Abr...	David Abrahams HIPS N...		04 A...
FLY001/0002	00:17	Jack Flynn	Jack Flynn Purchase of 1...		04 A...

2. Double click an entry to add details for posting. The following screen will appear.
3. Input/Amend the following details as required: -

Matter: The code of the current case is automatically displayed. Click the **Select Matter** button to bring up the matter list and select a different case if required.

Date: By default, the date the time was recorded will be shown. **Change** if required.

Time/Charge: Use the **option buttons** to select whether this entry should be charged on the basis of time spent or as a set charge.

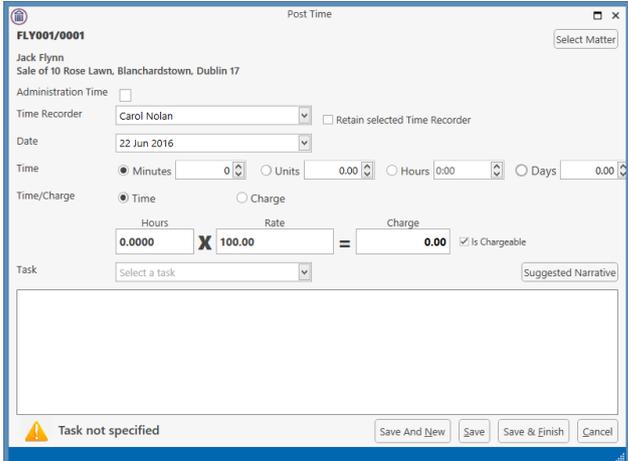
Minutes/Hours/Days: This will show the time recorded and can be amended if required.

Hourly Rate: The hourly rate will display the **default rate** for this handler and case.

Chargeable: Check the box if this time is chargeable or uncheck it if it is not. This can be set as a default setting by the System Administrator.

Task: Use the **drop-down** arrow to select from a list of tasks.

Comment: Input a narrative to describe the time entry

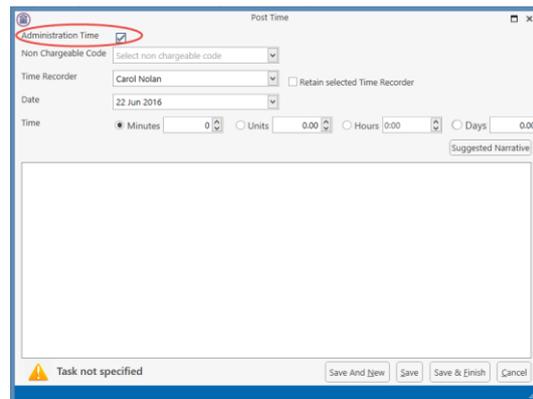
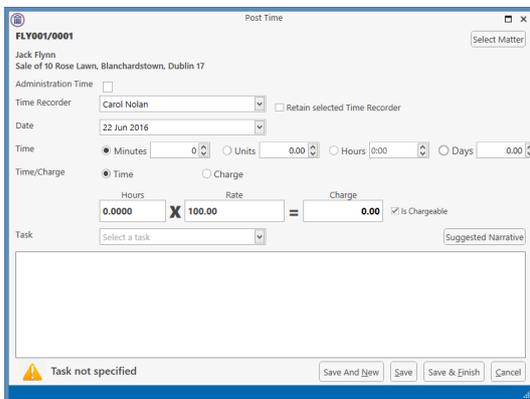
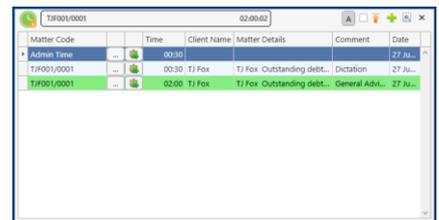
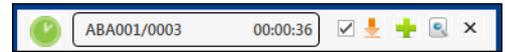


4. Click on **Save** to save the changes **or** click on **Save and Finish** to remove the entry from the list of timers.

 **NOTE:** All entries in the Timer are automatically displayed in the Daybook ready for posting.

How to Record and Post Admin Time Using the Timer

1. **Open** a Case in the Case Diary
2. Click **Start Timer** on the Home tab. The following timer will appear displaying the current case reference.
3. The clock will automatically start recording.
4. To pause recording click on the clock. By putting a tick in the box, the clock will follow you from case to case, starting a new clock on each case.
5. Expand the timer by clicking on **Maximise**.
6. Select the required timer.
5. **Double click** the entry to amend, the following screen will appear.



6. Put the **tick** in the Administration Time tick box. The screen will change displaying the following option:

Non-Chargeable Codes: Select a non-chargeable code from the drop-down list; e.g. Training, Illness, Holidays etc.

7. **Save** the changes

- Save & New** Will create a subsequent time slip for the same client
- Save** Will leave the time slip available on the list of timers for continued use
- Save & Finish** Will complete the time slip and remove it from the list of timers

NOTE: All time slips will need to be posted at the end of the day.

8. The timer will automatically **restart**.
9. To amend, double click the entry in the Timer and amend the following details as required.

- Date:** Today's date will be shown by default; amend if required.
- Minutes/Hours/Days:** This will show the time recorded and may be amended if required.
- Non- Chargeable Code:** Select from the drop-down list to change the non-chargeable code.

Comment: Input a narrative to describe the time entry

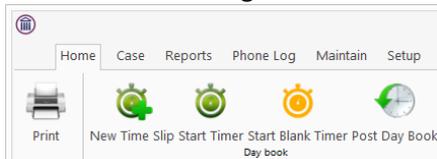
- Click on **Save and Finish**. This time entry is then transferred to the daybook ready for posting to time ledger.

 **NOTE:** You can record more than one non-chargeable time recording in your timer at any one time.

How to create an Empty Timer

At certain times you may want to start recording without first selecting a case. It is possible to create an empty timer which can later be allocated to a particular case.

- Click to Time Costing on the bottom left of the screen and select Start Blank Timer.



- To pause the timer click on the clock.

 **NOTE:** It is also possible to start a new timer in an existing case.



- Click on the Start timer tool on the Home tab. The current case will automatically be selected. This may have to be deleted.



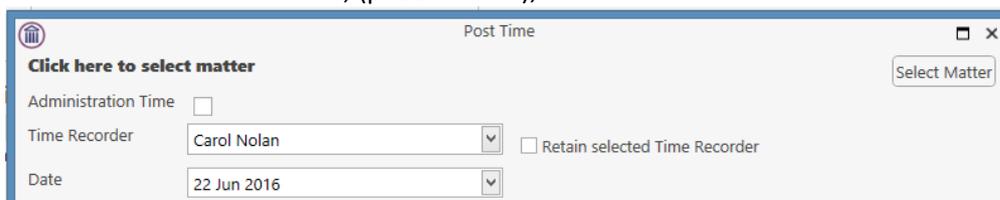
- Click on the **Green Plus** to add an empty timer.

- Click on **clock** to start the timer.

- To amend the entry, expand the timer by clicking on Maximise.



- Double click** the entry to add details for posting. This will bring up the Post Time dialogue box (see How to Post Time from the Timer, (p. 127 above), but without a matter code.



- Input/Amend the following details as required:

Matter: No case code will be displayed. Click the **Select Matter** button to bring up the matter list and select the case to which the time is to be posted.

Date: By default, the date of the time recording will be shown. Amend if required.

Minutes/Hours/Days: This will reflect the timings recorded but can be amended if required

Time/Charge: Use the **option buttons** to select whether this entry should be charged on the basis of time spent or as a set charge.

Hourly Rate: The hourly rate will display the **default rate** for this handler and case.

Chargeable: Check the box if this time is chargeable or uncheck it if it is not. By default, the box will be checked.

Task: Use the **drop-down** arrow to select from a list of tasks.

Comment: Input a narrative to describe the time entry

- Click on **Save** to save the changes or **Save and Finish** to remove the entry from the timer and post to the daybook.

How to create a manual time slip

- Open** a Case in the Case Diary
- Click on **Post time** on the Home tab to open a Time slip.
- Input** or Amend the following details

Matter: The case code will default to the current matter; to change the case, use the **select matter** button to view the matter list and double-click the required case to select it.

Date: This will default to the date the timing was recorded. Amend if required.

Minutes/Hours/Days: Input the amount minutes, hours, days etc.

Time/Charge Using the **option buttons** provided, set if the time recording is to be charged by time or a set charge.

Hourly Rate: The hourly rate will display the **default rate** for this handler and case.

Chargeable: Using the tick box provided tick if the time is chargeable or remove if it is not. This will default to chargeable.

Task: Click on the **drop down arrow** to reveal a list of tasks. **Click** the task required.

Comment: **Input** a narrative to describe the time entry

- When all details have been entered click Save or Save and Finish. The time slip will appear in the Daybook ready for posting.

How to create an Admin Time slip

- Open** a Case in the Case Diary
- Click the **Post time** tool on the Home tab to open a Time slip.
- Check the Administration Time box. The screen will change displaying the following option:

The screenshot shows the 'Post Time' form with the following details:

- Administration Time:** (circled in red)
- Non Chargeable Code:** Select non chargeable code (dropdown)
- Time Recorder:** Carol Nolan (dropdown) Retain selected Time Recorder
- Date:** 22 Jun 2016 (dropdown)
- Time:** Minutes 0 Units 0.00 Hours 0:00 Days 0.00
- Suggested Narrative:** (text area)
- Task not specified:** (warning icon)
- Buttons:** Save And New, Save, Save & Finish, Cancel

- Add the following details:

Date: Today's date will be the default; choose a different date if required.

Minutes/Hours/Days: Input the amount of hours, minutes, days etc.

Non- Chargeable Code: Use the drop-down list to select the non-chargeable code which applies.

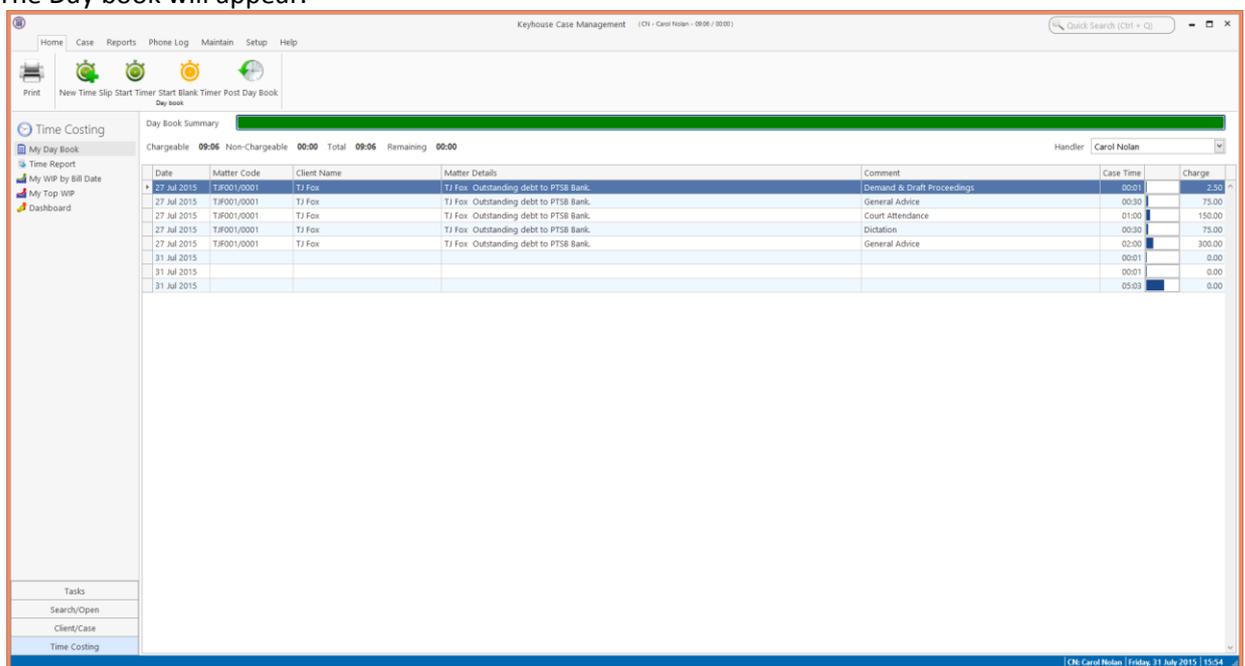
Comment: **Input** a narrative to describe the time entry

- Click on **Save and Finish**. This time entry is then transferred to the daybook ready for posting to time ledger.

 **NOTE:** It is possible to record more than one non-chargeable entry in your timer at a time.

How to View the Day Book from the Timer

- Open the **Timer**
- Click on **View All** on the timer tool bar. 
- The Day book will appear.



The screenshot shows the 'Day Book Summary' window in the Keyhouse Case Management software. The window title is 'Keyhouse Case Management (CN - Carol Nolan - 0908 / 0001)'. The interface includes a navigation bar with 'Home', 'Case', 'Reports', 'Phone Log', 'Maintain', 'Setup', and 'Help'. Below the navigation bar are icons for 'Print', 'New Time Slip', 'Start Timer', 'Start Blank Timer', 'Post Day Book', and 'Day Book'. The main area displays a table with columns: Date, Matter Code, Client Name, Matter Details, Comment, Care Time, and Charge. The table shows time entries for July 27, 2015, and July 31, 2015. A summary row at the top indicates: Chargeable 09:06, Non-Chargeable 00:00, Total 09:06, Remaining 00:00. The handler is listed as Carol Nolan.

Date	Matter Code	Client Name	Matter Details	Comment	Care Time	Charge
27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox: Outstanding debt to PTSB Bank.	General & Draft Proceedings	00:01	2.50
27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox: Outstanding debt to PTSB Bank.	General Advice	00:30	75.00
27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox: Outstanding debt to PTSB Bank.	Court Attendance	01:00	150.00
27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox: Outstanding debt to PTSB Bank.	Dictation	00:30	75.00
27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox: Outstanding debt to PTSB Bank.	General Advice	02:00	300.00
31 Jul 2015					00:01	0.00
31 Jul 2015					00:01	0.00
31 Jul 2015					05:03	0.00

My Day Book

Viewing the Day Book

- Click on **Time Costing** on the navigation Bar the day book will appear listing all your unposted time.
- Click on the required item.



Tip: Click on a column heading to sort by that heading, e.g. Matter Code

How create a Time slip in the Day Book

- Click on **New Time Slip** on Home Tab in **My Day Book**. The familiar Post Time dialogue box (see How to create a manual time slip, p. 127 above) will appear.

2. Provide details such as the matter, date, time, task etc. For further information see the section on How to create a manual time slip, p. 127 above.
3. When all details have been entered click **Save**. The time slip will appear in the Daybook ready for posting.

How to create an Admin Time slip in the Day Book

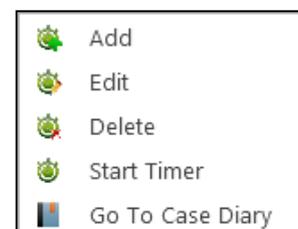
1. Click on **New Time Slip** on the Home tab in **My Day Book**. The Post Time dialogue box will appear.
2. Check the Administration Time box. The screen will change to display the options for Administration time (see How to create an Admin Time slip, p. 128 above).
3. Complete the details of Date, Time, Non-Chargeable Code and Comment as above, How to create an Admin Time slip, (p. 128).
4. Click on **Save and Finish**. This time entry is then added to the daybook ready for posting to time ledger.

How to amend a Time Slip

1. Click **Time Costing** on the Navigation panel.
2. **Double click** on the required time slip. The Post Time dialogue box will appear.
3. **Amend** as required.
4. Click **Save**.

How to Delete a Time Slip

1. Click **Time Costing** on the Navigation panel.
2. Right Click on the time slip you want to **delete**.
3. Select **Delete** from the pop-up menu. You will be asked to confirm the deletion.
4. Click **Yes**.



How to Post the Day Book

1. Click **Time costing** on the Navigation panel
2. Click on **Post Day Book** on the Home tab: this will post each time recording to the time ledger of the relevant case.

Accessing the Time Ledger Screen

Viewing the time Ledger

1. **Open** a case in the Case Diary.
2. Click on **Time Ledger** on the **Case Diary** Navigation panel.
3. The **Time Ledger** will be displayed.

Date	Comment	Time or Charge	Time	C/N-C	Charged	Billed Amount	Invoice No	Task	T/R
03 Aug 2010	Billed Fees: 6000.00	Bill	0	Chargeable	(60,000.00)	0.00	0	BILLED	Brian Sweeney
09 Nov 2010	For taking initial instructions and memoing the same.	Time	14	Chargeable	57.50	0.00	0	Document Drafting	Brian Sweeney
14 Mar 2011	General	Time	18	Chargeable	75.00	75.00	218	General Advice	Brian Sweeney
17 Apr 2011	Attendance	Time	26	Chargeable	107.50	107.50	218	Attendance	Brian Sweeney
20 Apr 2011	Advice	Time	60	Chargeable	250.00	250.00	218	Advice	Brian Sweeney
24 Apr 2011	Letter	Time	10	Chargeable	42.50	42.50	218	Letter Drafting	Brian Sweeney
30 Apr 2011	Photocopying	Time	30	Chargeable	125.00	125.00	218	Photocopying	Brian Sweeney
12 May 2011	Billed Fees: 600.00	Bill	0	Chargeable	(600.00)	0.00	218	BILLED	Brian Sweeney
12 May 2011	Billed Fees: 600.00	Bill	0	Chargeable	(600.00)	0.00	218	BILLED	Brian Sweeney
15 May 2011	Review medical report of GP for PIAB application	Time	50	Chargeable	207.50	0.00	0	Document Drafting	Brian Sweeney
17 May 2011	Phone call with client updating him of the status	Time	3	Chargeable	15.00	0.00	0	General Advice	Martina Winters
21 May 2011	Client Meeting to clear up issue in medical report	Time	35	Chargeable	145.00	0.00	0	Client Meeting	Brian Sweeney
30 May 2011	Advice client of possible next action and agree next step.	Time	30	Chargeable	125.00	0.00	0	Advice	Brian Sweeney
10 Jun 2011	Completed PIAB Application and draft form for approval.	Time	60	Chargeable	250.00	0.00	0	General Advice	Brian Sweeney
19 Jun 2011	Telephone call with client regarding queries on PIAB form.	Time	10	Chargeable	42.50	0.00	0	Telephone Attendance	Brian Sweeney
23 Jun 2011	Amending Letters/Document	Time	10	Chargeable	51.00	0.00	0	Phone Call	Martina Winters
01 Sep 2011	Finalise PIAB application and lodge same with PIAB	Time	5	Chargeable	12.00	0.00	0	Phone Call	Martina Winters
08 Sep 2011	Letter informing client of costs to date	Time	5	Chargeable	24.00	0.00	0	Phone Call	Martina Winters
29 Sep 2011	Draft Letter to Garda requesting technical information	Time	9	Chargeable	38.00	0.00	0	Phone Call	Martina Winters
11 Oct 2011	Review File and Draft Letter to client re status	Time	15	Chargeable	25.00	0.00	0	General Advice	Stephen Keogh
11 Oct 2011	Phone call with client re more queries	Time	10	Chargeable	17.00	0.00	0	General Advice	Stephen Keogh
11 Oct 2011	Client Meeting re special damages	Time	25	Chargeable	42.00	0.00	0	Client Meeting	Stephen Keogh
21 Nov 2011	Phone Call re Medical Report	Time	15	Chargeable	75.00	0.00	0	Phone Call	Martina Winters
22 Nov 2011	Client Meeting	Time	15	Chargeable	63.50	0.00	0	General Advice	Shane Keogh

Summary	
Total WIP (Hrs:Mins):	22:05
Total Recorded (Hrs:Mins):	26:29
Total Chargeable (Hrs:Mins):	24:29
Total Non-chargeable (Hrs:Mins):	2:00
Write Off (Hrs:Mins):	0:00

WIP Value:	5,047.77
Recorded Value:	6,147.77
Chargeable Value:	5,647.77
Non-chargeable Value:	500.00
Write Off Value:	0.00
Billed:	60,635.00
Current Profit/Loss:	54,487.23

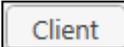
Tip: Click on a column headings to sort by that heading e.g. T/R (Time Recorder).

Tip: you can also Start the timer and create a time slip using the Home tab on this screen. See the previous sections for further details on how to record and post time.

How to Create a Draft Invoice from the Time Ledger Screen

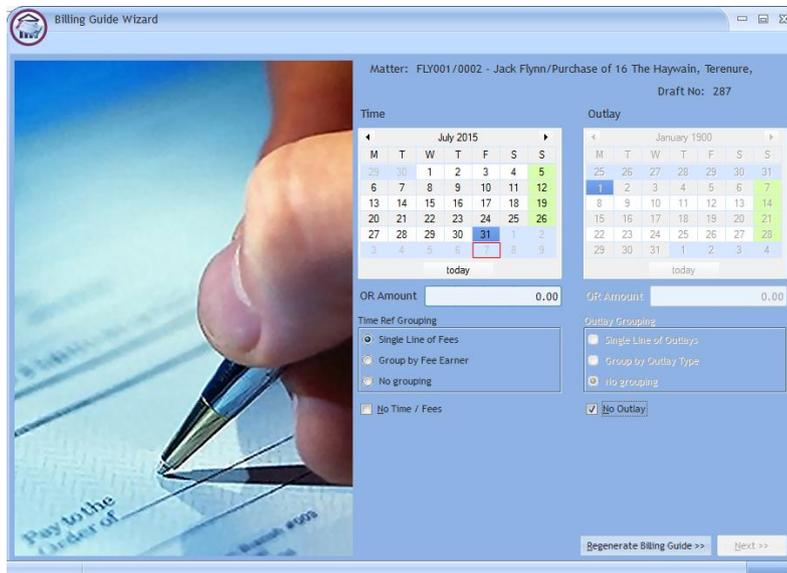
1. **Open** a case in the Case Diary.
2. Click on **Time Ledger** on the **Case Diary** Navigation panel.
3. Click on **Draft Invoice** on the Home tab. The following Draft Invoice will appear.

NOTE: The current balances on the matter are displayed on the right of the screen.

- Message:** Input a message for the account department (optional)
- Type:** **Invoice** will be checked by default. Select **Credit Note** if required.
- Open Invoice:** To create an open invoice, check the **Open Invoice** box.
- Bill Sent:** Check when the bill is actually sent.
- Matter:** This will show the current case by default; to change, click on the browse button to bring up the matter list and select a different case.
- Description:** This will default to the matter description of the current case but may be amended.
- Date:** The date will default to today's date but may be changed.
- Transfer to Pay:** If this is checked, funds will be transferred from the client account to pay the bill.
- Bill to:** The client details will be shown by default, but the name and/or address may be changed. Click the **Client button** to revert to the client details. 
- Our Ref:** This will default to the Fee Earner's initials, but may be amended if required.
- Your Ref:** Input a reference if applicable.
- Write down time to:** Today's date will be shown by default. You may choose a different date.

4. The time and outlay to be included in the bill may be input using the **Billing Guide Wizard** or manually.
 - a. Using the **Bill Guide Wizard**

i) Click on **Billing Guide** at the bottom left corner to start the Billing Guide Wizard.



The left-hand column deals with time, the right-hand one with outlay. In each column, you may select a **date** or enter an **amount**. Different dates may be selected for time and outlay. If you select a date, the time (or outlay) will be written down to that date; if you specify an amount, sufficient time (outlay) will be written down to make up the required amount, with the remainder remaining unbilled and available for inclusion in future invoices.

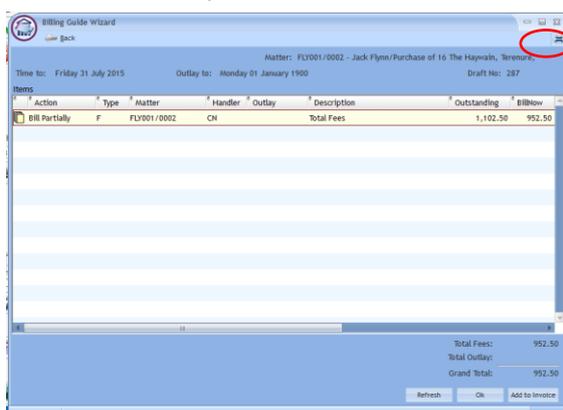
The options for grouping time are:

- Single line of fees — the fee earners will not be listed individually.
- Group by Fee earner — the total for each fee earner will be listed on its own line.
- No grouping — each item will be listed as recorded.

If the box marked No Time/Fees is checked, no time will be included in the bill; all recorded time will remain available for inclusion in future bills.

The options for grouping outlay are similar:

- Single Line of Outlays — a total figure for outlay will be given without listing items separately. You can also run a report that will detail the individual items by clicking on the Report Button.

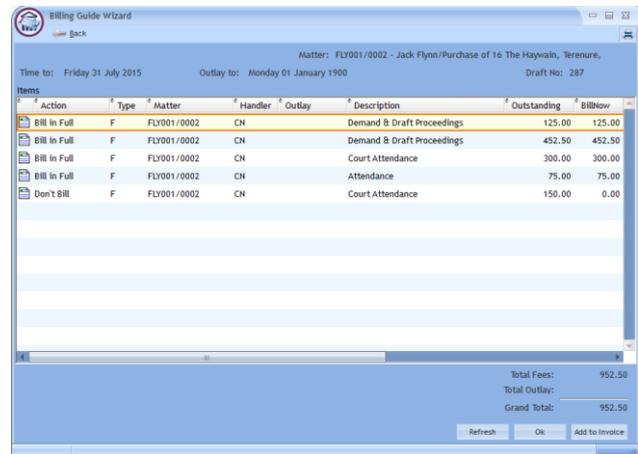


Soo Grabbit & Runne					
VAT No : 8746675DD					
			Date:	07/08/2015	
			Invoice No :	0	
			Our Ref :	FLY001/0002	
Jack Flynn 4 The Mews Rathfarnham Dublin 6a					
Date	Billing Description	Time	Net Fees	VAT Amount @ 23%	Net Outlay
OurRef	YouRef				
FLY001/0002	Purchase of 16 The Haywain, Terenure, Dublin 6				
03/07/2015	Demand & Draft Proceedings	00 : 50	125.00	28.75	
03/07/2015	Attendance	00 : 30	75.00	17.25	
03/07/2015	Demand & Draft Proceedings	03 : 01	452.50	104.08	
03/07/2015	Court Attendance	02 : 00	300.00	69.00	
BGDetail:DATE (DateTime)					
		Matter Totals:	06 : 21	952.50	219.08
		Net Grand Totals:	06 : 21	952.50	219.08

- Group by Outlay Type — the outlay can be grouped to show the total for each type of outlay, such as medical reports and stamp duty, if each item of expenditure has been allocated to a type.
- No Grouping — each item of outlay will be listed in the order in which it was entered.

ii) Click Regenerate Billing Guide to continue to the next screen.

This example shows no Grouping on either fees or outlays

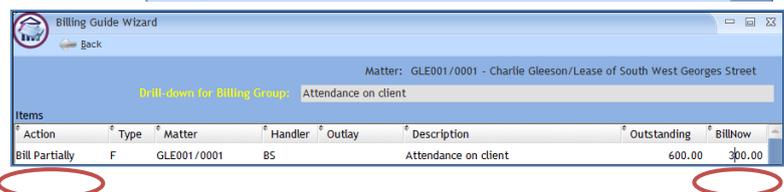


iii) Items can be amended in this screen below are a list of options:

How to Partially Bill an Item

- Double-click the item to be changed:

- Click the figure in the **Bill Now** column and change the amount. The **Action** will change to **Partially Billed**.



- Click **OK** to save the change.

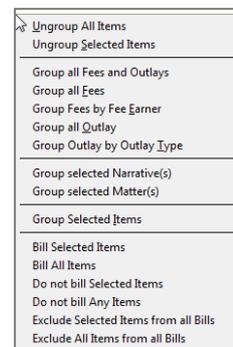
How to exclude an action item from a bill

- Click the item to be excluded.

Tip to exclude more than one item hold down the CTRL key on your keyboard and click on each of the items.

- **Right-click** the selection and choose one of the following commands from the pop-up menu:

- **Do not bill Selected Items** — the items will be excluded from the current bill only;
- **Exclude Selected Items from all Bills** — the items will not be included in any future bill.

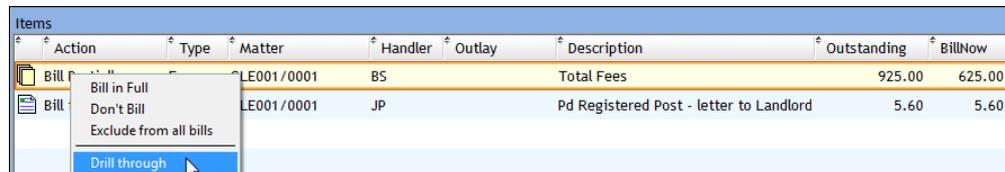


To Add Grouping Levels

Right click on an item and select the required Grouping option from the pop-up menu

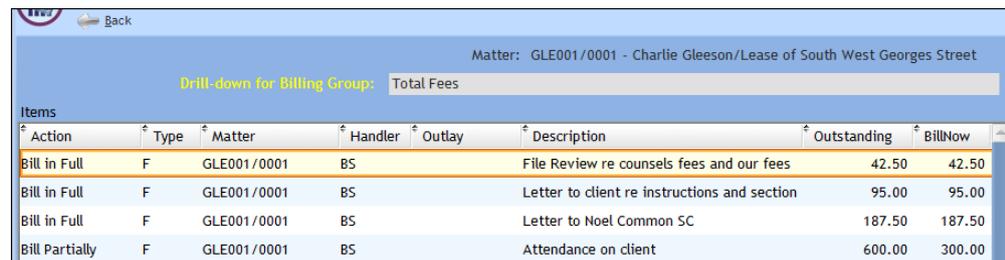
How to Drill down to view all items in a group

- Click on a grouped item and select **Drill Through** from the pop-up menu.



Action	Type	Matter	Handler	Outlay	Description	Outstanding	BillNow
Bill		GLE001/0001	BS		Total Fees	925.00	625.00
Bill		GLE001/0001	JP		Pd Registered Post - letter to Landlord	5.60	5.60

- The items of fees or outlay included in the group will be listed individually and may be changed as described above.



Matter: GLE001/0001 - Charlie Gleeson/Lease of South West Georges Street

Drill-down for Billing Group: Total Fees

Action	Type	Matter	Handler	Outlay	Description	Outstanding	BillNow
Bill in Full	F	GLE001/0001	BS		File Review re counsels fees and our fees	42.50	42.50
Bill in Full	F	GLE001/0001	BS		Letter to client re instructions and section	95.00	95.00
Bill in Full	F	GLE001/0001	BS		Letter to Noel Common SC	187.50	187.50
Bill Partially	F	GLE001/0001	BS		Attendance on client	600.00	300.00

- Click the **Back** button to return to the previous screen.

iv) When complete:

- Click **OK** to update the draft. A message will ask whether you want to recalculate the **Fee Earner Breakdown** based on the changes to the Billing Guide. Click **Yes** to recalculate or **No** if you do not wish to recalculate.

OR

- Click the **Add to Invoice** button when you are ready to update the invoice. A message will ask whether you want to recalculate the **Fee Earner Breakdown** based on the changes to the Billing Guide. Click **Yes** to recalculate or **No** if you do not wish to recalculate.

b. Adding a Line to the bill manually

Message: _____

Request Type: Invoice Open Invoice Bill Sent Invoice / Bill No: (not invoiced)

Matter Details

Matter: FLY001/0001 Jack Flynn

Fee Earning: Carol Nolan

Description: Sale of House at:
4 The Mews
Rathfarnham
Dublin 6

Date: 03 Jul 2015 Transfer To Pay

Bill To: Jack Flynn
4 The Mews
Rathfarnham
Dublin 6a

Client

Our Ref: CN Your Ref: _____

Write down Time to: 03 Jul 2015

Type	Narrative	Net	VAT Value	Fee Earning
F	Document Drafting	150.00	34.50	Carol Nolan
F	Phone Call	27.50	6.33	Carol Nolan
F	Advice on Contract	400.00	92.00	Carol Nolan

Summary: Bills: 0.00, Outlay: 0.00, Client: 0.00, Charges: 282.50, Time (HH:MM): 1:53

- i) Right-click in the **Invoice Details** screen to see the pop-up menu.
- ii) Select **Add a Bill Detail Line**.
- iii) On the **Add or edit Bill Detail Line** screen, input a narrative and amount and change the default information as necessary.

Jack Flynn

Sale of House at: 4 The Mews, Rathfarnham, Dublin 6

Fees Outlays Miscellaneous Outlays

Fee Earning: Carol Nolan

Nominal: Fees issued - Carol Nolan

Narrative: _____

Net: 0.00 VAT Code: U VAT Value: 0.00 Override VAT

Ok Cancel

Line No: (new)

- iv) Click **OK** to add to the invoice. Repeat the process for each additional line required.

c. How to amend the Fee Earning Breakdown

- i) Click the **Fee Earning Breakdown** Tab.

Fee Earning	Percentage	Value	VAT	VAT Amount
-------------	------------	-------	-----	------------

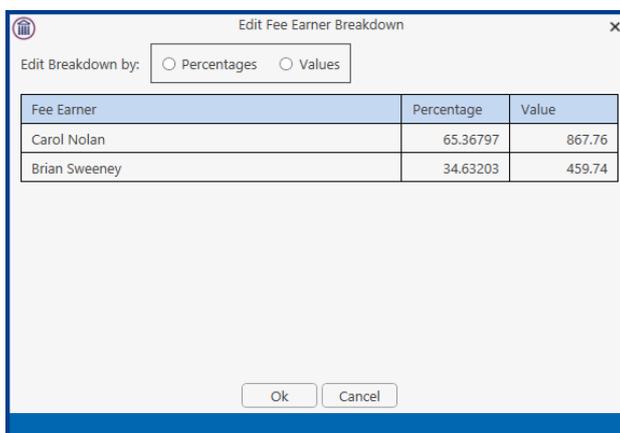
Add a Bill Detail Line

Clear Bill Detail Lines

The breakdown will have been calculated automatically, based on time charged in the invoice in respect of each fee earner.

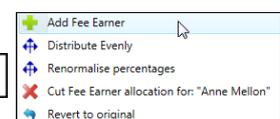
- ii) To amend right-click and select **Maintain Fee Earning Breakdown**.

- iii) In the Edit Fee Earner Breakdown window, you may choose to edit the breakdown either by percentages or values. Choose one or the other, then click in the relevant column to change the percentages or values.

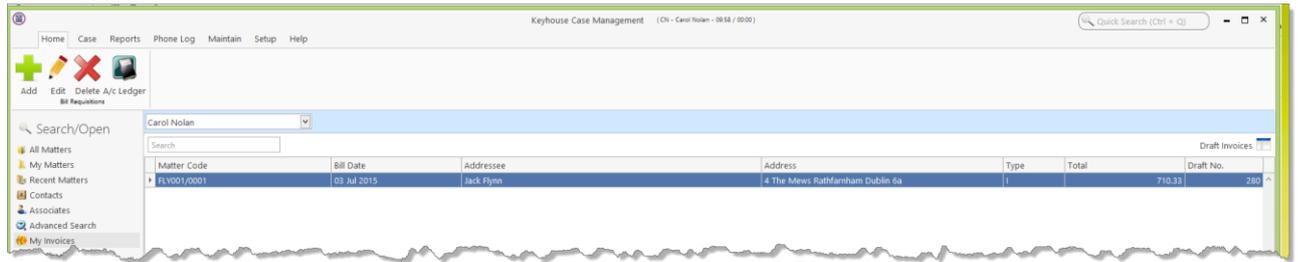


- iv) Alternatively, you may right-click on any of the fee earners and select the required command from the pop-up menu.
- v) If you select **Add Fee Earner**, you will be able to choose from a list of fee earners by double-clicking.
- vi) If you select **Cut Fee Earner allocation for [Fee Earner Name]**, that fee earner's allocation will be removed from the breakdown
- vii) In either case, you will be returned to the **Edit Fee Earner Breakdown** screen, where you can alter the percentages or values as described in iii) above.
- viii) Click **OK** to save the changes and be returned to the **Draft Invoice** screen.
5. Click **OK** on the left-hand column of the **Draft Invoice** screen to save the draft bill or **Release** to send to accounts for approval.
6. The Draft Bill will appear as an entry in the case diary for future review.

15 Nov 2014	14:03	CN	Draft Bill Draft Bill No: 268
-------------	-------	----	-------------------------------



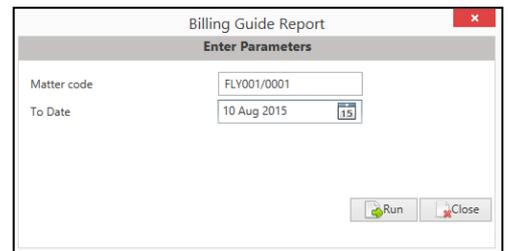
7. To view the draft invoice, double-click the entry and amend as required. Then click **Release** as in 5 above to send to accounts for approval.
8. Once the invoice has been released by Accounts the Draft Invoice will disappear from the Case Diary and be replaced by the Invoice.
9. All draft invoices can be seen in in My Invoices on the Search/Open screen



Create a Billing Guide Report

1. **Open** a case in the Case Diary.
2. Click on **Time Ledger** on the **Case Diary** Navigation panel.
3. Select **Billing Guide** on the Home tab to bring up a screen asking for parameters for the Billing Guide report.

- a. Specify the date down to which the report is to be prepared
- b. Enter the matter code. The current case will be shown by default



4. Click **Run**. The report will be generated showing the Billing Guide.



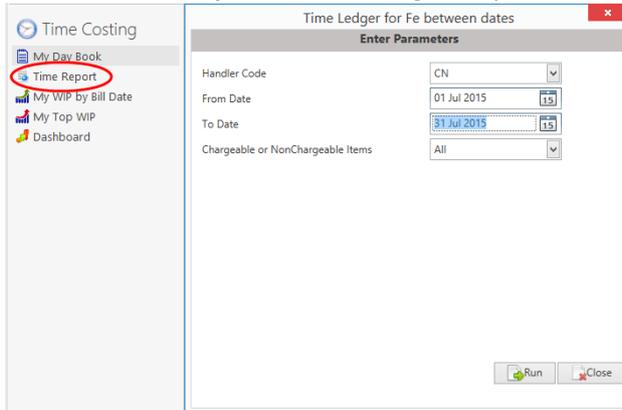
Soo Grabbit & Runne									
Billing Guide Report									
As at : 31/07/2015									
FLY001/0001		Jack Flynn Sale of House at: 4 The Mews, Rathfarnham, Dublin 6							
Date	FE	Comment	Task	Time Hrs:Min	Accum. Hrs:Min	Rate	Charge	Accum Charge	OS Charge
03/07/2015	CN	Phone Call	PHO	0 : 11	0 : 11	150.00	27.50	27.50	27.50
03/07/2015	CN	Document Drafting	DRA	1 : 00	1 : 11	150.00	150.00	177.50	150.00
03/07/2015	CN	Phone Call	PHO	0 : 10	1 : 21	150.00	25.00	202.50	25.00
03/07/2015	CN	Draft Bill No274	DRA	0 : 30	1 : 51	150.00	75.00	277.50	75.00
03/07/2015	CN	Attendance	ATT	0 : 02	1 : 53	150.00	5.00	282.50	5.00
TOTAL					1 : 53				282.50
Summary WIP Fee Earner									
				Time					
Fee Earner				(Hrs:min)	Charge				
Carol Nolan				1 : 53	282.50				
WIP Totals				1 : 53	282.50				
Unbilled Outlay									
Date	Ref	Narrative					UnBilled Outlay	Cumulative UnBilled Outlay	
							UnBilled Total		

The Report may be exported to a Word document (DOC), PDF or an Excel spreadsheet (XLS)

Additionally, you may use the toolbar to **Print** the report, **Refresh** it or **Export** it as a Crystal report, or to **Search** for a word or phrase.

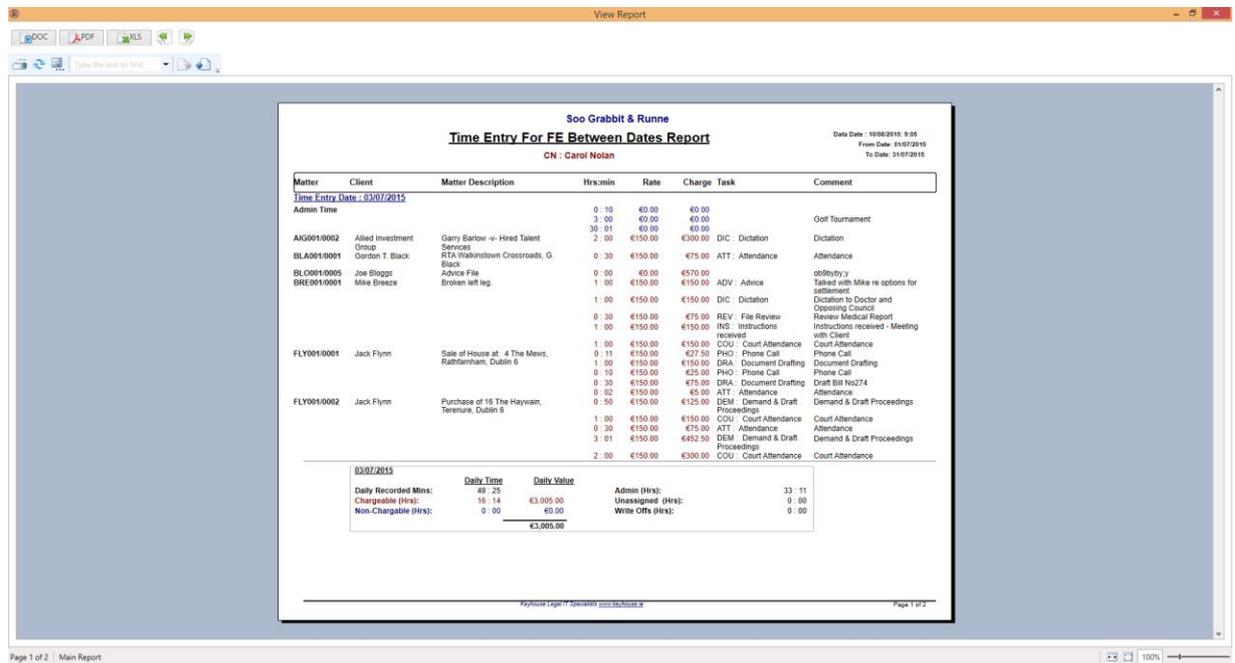
The Time Report

1. Click **Time Report** on the Navigation panel in **Time Costing**.



Input the parameters for the report: the Handler Code, and dates from and to which the report is to be generated

2. Click **Run**. The report may be exported, printed or searched in the same way as the **Billing Guide** report above.



My WIP by Bill Date

1. Click **My WIP by Bill Date** on the Navigation panel in **Time Costing**.

WIP is Work in Progress i.e. unbilled time

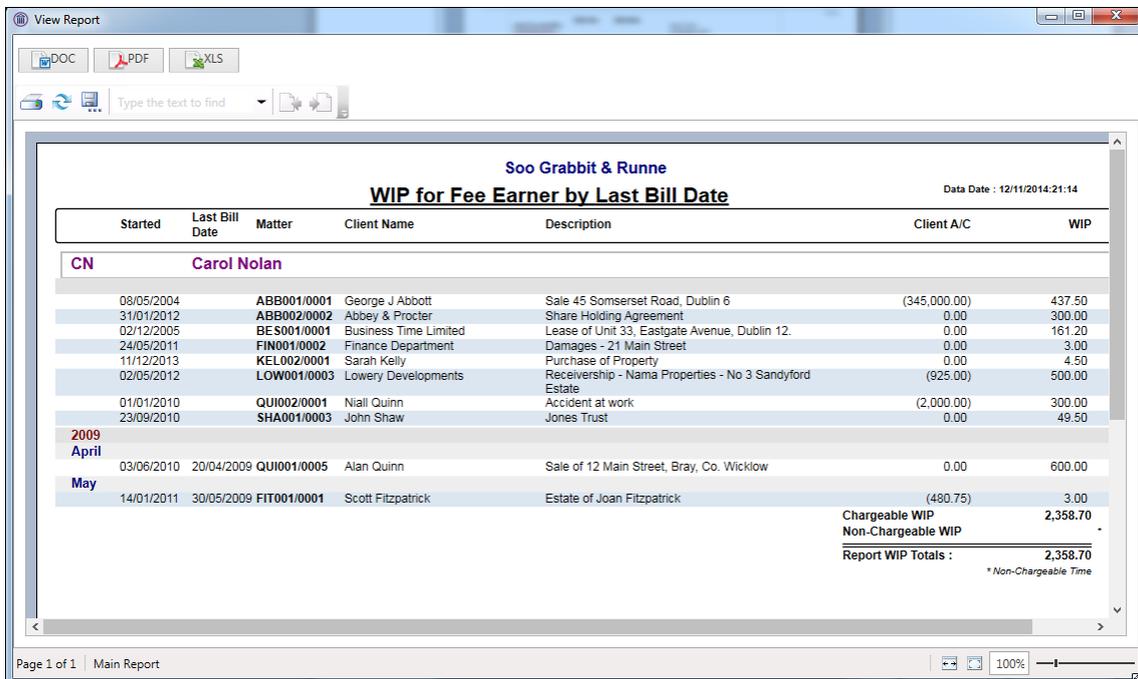
Soo Grabbit & Runne
WIP for Fee Earner by Last Bill Date

Data Date : 10/08/2015: 9:08

Started	Last Bill Date	Matter	Client Name	Description	Client A/C	WIP
CN Carol Nolan						
31/01/2012		ABB002/0002	Abbie Lynch	Share Holding Agreement	0.00	300.00
29/05/2014		AIG001/0002	Allied Investment Group	Garry Barlow -v- Hired Talent Services	0.00	300.00
02/12/2005		BES001/0001	Business Time Limited	Lease of Unit 33, Eastgate Avenue, Dublin 12.	0.00	301.20
03/07/2015		BRE001/0001	Mike Breeze	Broken left leg.	0.00	675.00
29/09/2011		BRO002/0001	Thomas Brolin	Legal Advice re Repatriation	(200.00)	110.00
24/05/2011		FIN001/0002	Finance Department	Damages - 21 Main Street	0.00	6.00
02/07/2015		FLY001/0001	Jack Flynn	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6	0.00	282.50
02/07/2015		FLY001/0002	Jack Flynn	Purchase of 16 The Haywain, Terenure, Dublin 6	0.00	1,102.50
15/03/2012		LAW002/0001	Margaret Lawlor	Debt collection against husband	0.00	10.00
02/05/2012		LOW001/0001	Lowery Developments	Receivership - Nama Properties 1 Sandyford Estate	(2,100.00)	2,105.00
02/05/2012		LOW001/0003	Lowery Developments	Receivership - Nama Properties - No 3 Sandyford Estate	(925.00)	625.00
01/01/2010		QUI002/0001	Niall Quinn	Accident at work	(2,000.00)	363.00
23/09/2010		SHA001/0003	John Shaw	Jones Trust	0.00	49.50
06/07/2015		TJF001/0001	TJ Fox	Outstanding debt to PTSB Bank.	0.00	312.50
2011						
May						
08/05/2010	12/05/2011	BLA001/0001	Gordon T. Black	RTA Walkinstown Crossroads, G. Black	0.02	1,075.00
December						
02/05/2012	31/12/2011	LOW001/0004	Lowery Developments	Receivership - Nama Properties - No 81 Sandyford Business Park	(925.00)	192.00
02/05/2012	31/12/2011	LOW001/0005	Lowery Developments	Receivership - Nama Properties - South County Dublin - Disputed	(1,000.00)	667.50
2012						
January						
02/05/2012	31/01/2012	LOW001/0002	Lowery Developments	Receivership - Nama Properties No 2 Sandyford Estate	(925.00)	225.00
March						
10/11/2011	06/03/2012	LAW001/0001	Liz Lawlor	Advice re Inheritance tax	(5,000.00)	147.00
2014						
June						
20/05/2011	19/06/2014	ABA001/0001	David Abrahams	Family Law	(7,737.17)	4.00
					Chargeable WIP	9,961.70
					Non-Chargeable WIP	-
					Report WIP Totals :	9,961.70

* Non-Chargeable Time

- The same options are available for printing, export and searching as in the case of the **Time Report** and **Billing Guide** report.



My Top WIP

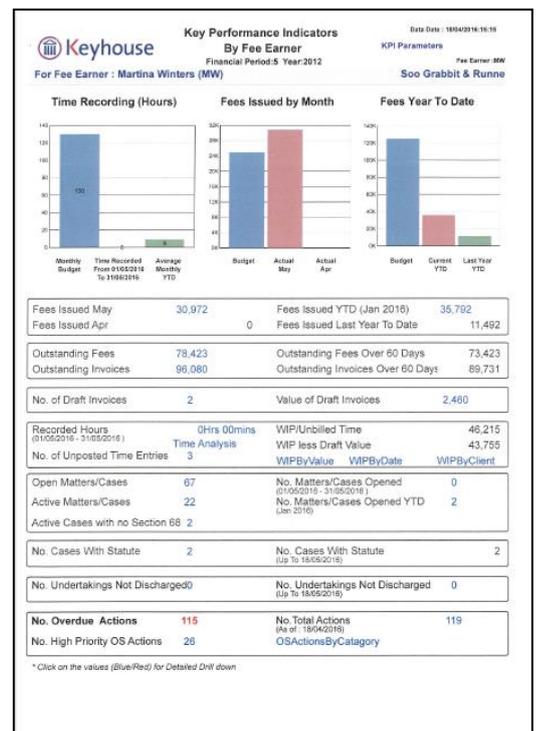
- Click **My Top WIP** on the Navigation panel in **Time Costing**.

Soo Grabbit & Runne					
Top Work In Progress By Fee Earner					Data Date : 10/08/2016; 9:42
					Fee Earner : CN
Including chargeable and nonchargeable time					
Matter	Last Bill Date	Client Name	Matter Description	Client A/c	WIP
CN	Carol Nolan				
LOW001/0001		Lowery Developments	Receivership - Nama Properties 1 Sandford Estate	(2,100.00)	2,105.00
FLY001/0002		Jack Flynn	Purchase of 16 The Haywain, Terenure, Dublin 6	0.00	1,102.50
BLA001/0001	12/05/2011	Gordon T. Black	RTA Walkinstown Crossroads, G. Black	0.02	1,075.00
BRE001/0001		Mike Breeze	Broken left leg.	0.00	675.00
LOW001/0005	31/12/2011	Lowery Developments	Receivership - Nama Properties - South County Dublin - Disputed	(1,000.00)	667.50
QUI001/0005	05/06/2010	Alan Quinn	Sale of 12 Main Street, Bray, Co. Wicklow	0.00	663.00
LOW001/0003		Lowery Developments	Receivership - Nama Properties - No 3 Sandford Estate	(925.00)	625.00
DEA001/0001	03/08/2010	James Deane	RTA Whites Cross, Stillorgan	0.00	375.00
QUI002/0001		Niall Quinn	Accident at work	(2,000.00)	363.00
TJF001/0001		TJ Fox	Outstanding debt to PTSB Bank.	0.00	312.50
BES001/0001		Business Time Limited	Lease of Unit 33, Eastgate Avenue, Dublin 12.	0.00	301.20
ABB002/0002		Abbie Lynch	Share Holding Agreement	0.00	300.00
AIG001/0002		Allied Investment Group	Garry Barlow -v- Hired Talent Services	0.00	300.00
FLY001/0001		Jack Flynn	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6	0.00	282.50
LOW001/0002	31/01/2012	Lowery Developments	Receivership - Nama Properties No 2 Sandford Estate	(925.00)	225.00
LOW001/0004	31/12/2011	Lowery Developments	Receivership - Nama Properties - No 81 Sandford Business Park	(925.00)	192.00
LAW001/0001	06/03/2012	Liz Lawlor	Advice re Inheritance tax	(5,000.00)	147.00
BRO002/0001		Thomas Brolin	Legal Advice re Repatriation	(200.00)	110.00
SHA001/0003		John Shaw	Jones Trust	0.00	49.50
TAL001/0001	16/11/2010	Deirdre Talbot	Drunk Driving Arrest - 6th September 2009	0.00	42.50
SIM001/0001	25/04/2010	Bart Simpson	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6	0.00	25.50
LAW002/0001		Margaret Lawlor	Debt collection against husband	0.00	10.00
FIN001/0002		Finance Department	Damages - 21 Main Street	0.00	6.00
ABA001/0001	19/06/2014	David Abrahams	Family Law	(7,737.17)	4.00
FIT001/0001	06/06/2010	Scott Fitzpatrick	Estate of Joan Fitzpatrick	(480.75)	3.00
Report Totals					9,961.70

- The same options are available for printing, export and searching as in the case of the **Time Report** and **Billing Guide** report.

KPI Reports

- Click **Dashboard** on the Navigation panel in **Time Costing** to see the Key Performance Indicators report for the fee earner who is logged in.
- Click on the figures in **blue** or **red** to view a sub-report containing a breakdown of the details that make up that figure.
- In the sub-report, click the **Preview** tab to return to the main KPI report.
- The options to **Export**, **Print** and **Search** the KPI Report are the same as those for the other reports described above.

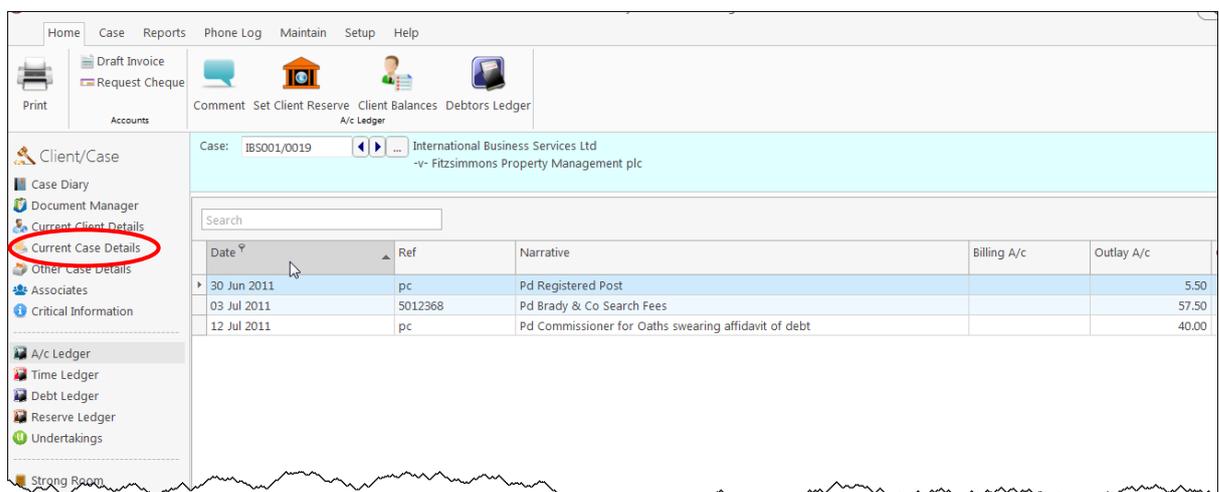


Chapter 13: Accounts

Account Functions in the Case Diary

View the Matter Ledger

1. **Open** a case in the Case Diary.
2. Click on **A/C Ledger** on the Case Diary Navigation panel.
3. The following screen will appear.



NOTE: For further information on the matter ledger see the SAM Accounts Manual.

Run a Report on client balances

1. **Open** a case in the Case Diary.
2. Click on **A/C Ledger** on the Case Diary Navigation panel.
3. Click on the **client balances** icon on the Home tab of the Ribbon. The following screen will appear.
4. It will default to the current client; select a different client from the drop-down list, if required.
5. A report will appear listing all matter balances for this client.

Client Balance Report

Enter Report Criteria

From Client Code (Blank for all)

To Client Code (Blank for all)

As At Date 15

Minimum Value (0 for All)

Open or Closed Matters

Show Details

Soo Grabbit & Runne
Matter List
(Incl. Fwd Postings)

(Last Posting: 06/09/2012)

HAL002	Hire Banking Ltd			Billing A/c	Outlay A/c	Client Cur.	Client Dep.
0000	0000 Matter	GEN	AD	0.00	0.00	0.00	0.00
0001	Debt Recovery - Jack Johnston	LIT	MV	1,968.42	0.00	0.00	0.00
0002	Debt Recovery - Mary Ascond	DEB	MV	4,650.96	0.00	0.00	0.00
Total Matters: 3				Total Balances:	6,619.38	0.00	0.00

* = Billed

Page 1 of 1 | Main Report

How to set a reserve amount

1. **Open** a case in the Case Diary.
2. Click on **A/C Ledger** on the Case Diary Navigation panel.
3. Click on **Set Client Reserve** on the Home tab, and the following screen will appear.
4. **Input** an amount and a comment.
5. Click **OK**; the reserve amount will then appear on the matter ledger.

Set Client A/C Reserve

Reserve
6,000.00

Comment for Ledger
Reduced amount

Ok Cancel

How to add a comment

1. **Open** a case in the Case Diary.
2. Click on **A/C Ledger** on the Case Diary Navigation panel.
3. Click on the **Comment** icon on the Home tab.
4. Input a comment.
5. Click **OK**; the comment will then appear on the matter ledger.

Add Comment

Date
15 Nov 2014

Paying in Part Payments

Ok Cancel

How to Create a Cheque Request

1. **Open** a case in the Case Diary.
2. Click on **A/C Ledger** on the Case Diary Navigation panel.
3. Click on **Request Cheque** on the Home tab.
4. Input the following information:

Bank: Select the required bank account from the drop-down list.

Date: Today's date will be shown by default. Change as necessary.

Payee: Input the Payee's name or select from the supplier drop-down list.

Value: **Input** the amount of the cheque.

Fee Earning: This will default to the current fee earner. Select a different fee earner from the drop-down list if required.

Third Party: Check the box if this is a third party cheque.

Narrative: **Input** a cheque narrative or click on the down arrow to pick from a list of narratives.

Notes: **Input** a note to the Accounts Department if required.

Matter: This will show the current case. To select a different case, click on the browse button for the matter list and **double-click** the required case.

Notify Release: Check this box if you want an email to be sent to the Accounts Department when the cheque has been released.

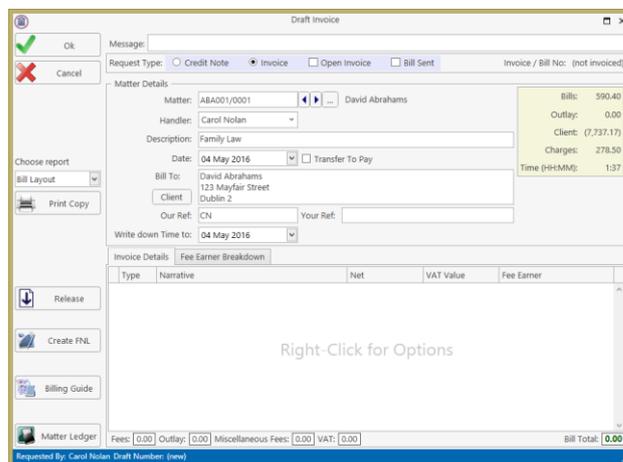
Ledger Narrative: By default to the cheque narrative will be shown but it can be amended either manually or by selecting from the drop-down list.

5. To release the cheque to accounts click **Release**. Alternatively to hold the cheque in your cheque list click OK.

How to Create a Draft Invoice

1. **Open** a case in the Case Diary.
2. Click on **A/c Ledger** on the **Case Diary** Navigation panel.
3. Click on **Draft Invoice** on the Home tab while in **A/c Ledger**. A Draft Invoice screen will appear.

NOTE: The current balances on the matter are displayed on the right of the screen.



Message: Input a message for the Accounts Department (optional)

Type: Invoice will be checked by default; select **Credit Note** if required.

Open Invoice: Check the box to create an open invoice.

Bill Sent: This box is to be checked when the bill is actually sent.

Matter: This will default to the current case; to change the case click on the browse button to bring up a matter list and double-click the required case.

Description: This will default to the matter description to amend click in the input box provided and amend.

Date: The date will default to today's date but may be changed.

Transfer to Pay: If this is checked, funds will be transferred from the client account to pay the bill.

Bill to: The client details will be shown by default, but the name and/or address may be changed. Click the **Client** button to revert to the client details.



Our Ref: This will default to the Fee Earner's initials, but may be amended if required.

Your Ref: Input a reference if applicable.

Write down time to: Today's date will be shown by default. You may choose a different date for the time to be written down to.

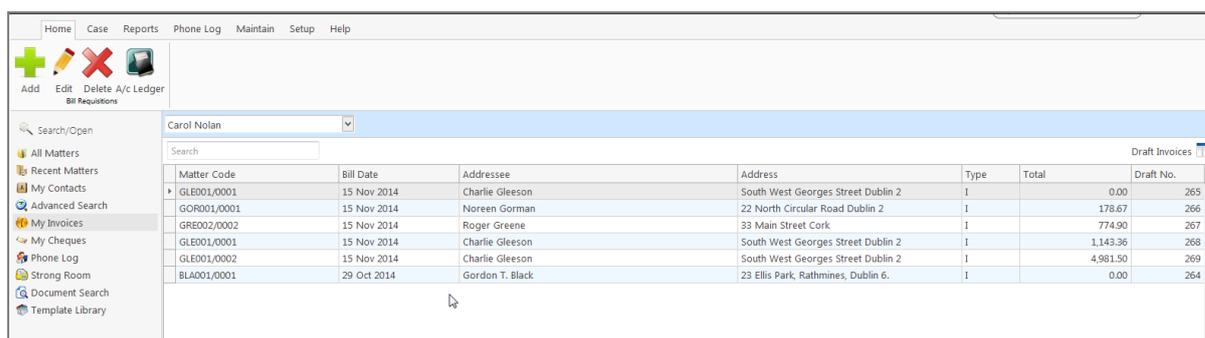
4. Insert the Bill Details: this can be done by importing time and outlays using the **Billing Guide Wizard** or by manually inputting fees and outlays.

See Chapter 12 (p. 122), above for particulars of how to use the Billing Guide wizard and manually adding time and outlay to a bill.

My Draft Invoices

How to View My Invoices

1. Click on **Search/Open** on the Navigation panel.
2. Select **My Invoices** on the Navigation panel to display a list of your draft invoices.



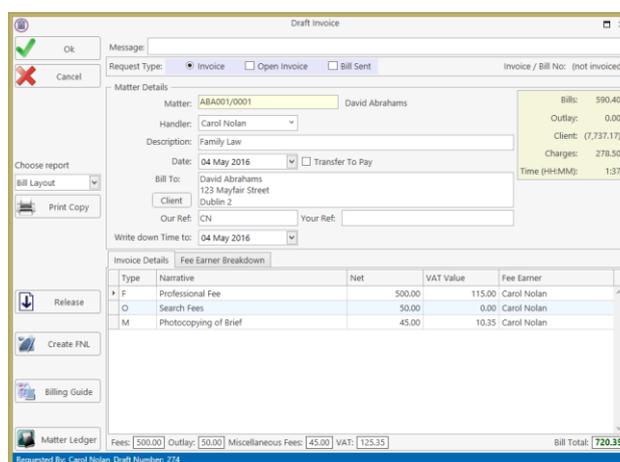
Matter Code	Bill Date	Addressee	Address	Type	Total	Draft No.
GLE001,0001	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	0.00	265
GOR001,0001	15 Nov 2014	Noreen Gorman	22 North Circular Road Dublin 2	I	178.67	266
GRE002,0002	15 Nov 2014	Roger Greene	33 Main Street Cork	I	774.90	267
GLE001,0001	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	1,143.36	268
GLE001,0002	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	4,981.50	269
BLA001,0001	29 Oct 2014	Gordon T. Black	23 Ellis Park, Rathmines, Dublin 6.	I	0.00	264

How to Add a Draft Invoice

1. Click **Add** on the Home tab while viewing **My Invoices** as described above.
2. A draft Invoice will appear.
3. Complete as previously described in How to Create a Draft Invoice, p. 145 above.

How to Edit a Draft Invoice

1. Go to **My Invoices** as described above.
2. Either select the invoice to be edited and click the **Edit** icon on the Home tab or **double-click** the invoice in the list.
3. **Edit** the invoice as required.
4. Click **OK** to save the changes or click **Release** to save the change and send to Accounts for approval.



Type	Narrative	Net	VAT Value	Fee Earner
F	Professional Fee	500.00	115.00	Carol Nolan
O	Search Fees	50.00	0.00	Carol Nolan
M	Photocopying of Brief	45.00	10.35	Carol Nolan

Summary: Fees: 500.00, Outlay: 50.00, Miscellaneous Fees: 45.00, VAT: 125.35, Bill Total: 720.35

How to Delete a Draft Bill

1. Go to **My Invoices** as described above and select the invoice which is to be deleted.

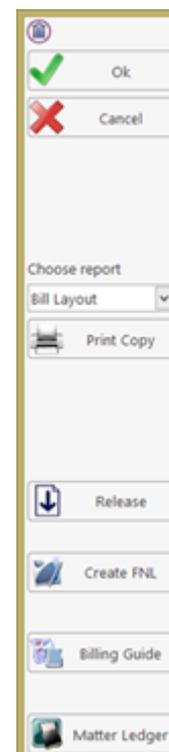
2. Click on **Delete** on the Home tab or press **Delete** on your keyboard; you will be asked to confirm the deletion.
3. Click **OK** to delete.

How to Release a Draft Bill to Accounts

1. Go to **My Invoices**.
2. **Double click** on the invoice to be released; the draft bill will appear.
3. Click on the **Release** button on the left-hand panel to send to Accounts for approval.

How to Print a Draft Bill

1. Go to **My Invoices**
2. **Double click** on the bill you want to Print; the draft bill will appear.
3. Click on the **Print Copy** button.
4. Click on **Print** located on the report toolbar to print the draft bill.



View Report

DOC PDF XLS

Type the text to find

Print

INVOICE
DRAFT

Charlie Gleeson 15 Nov 2014
South West Georges Street Dublin 2

Account Ref: GLE001 0001 Our Ref: JP
Invoice No: 0 Your Ref:

Lease of South West Georges Street	Not Liabile to VAT €	Liabile to VAT €
Attendance on client		600.00
Letter to client re instructions and section 68 letter		95.00
File Review re counsels fees and our fees		42.50
Letter to Noel Common SC		187.50
Pd Registered Post - letter to Landlord	5.60	
Subtotals	5.60	925.00
925.00 @ 23.00 % VAT		212.76
<i>Add total not subject to VAT</i>		5.60
INVOICE TOTAL:		1,143.36

Credit Notes

If a Credit Note is required, please contact your Accounts Department. Credits notes will have an impact on all billed time related to the original invoice regardless of the value of the credit note.

My Cheques

How to Create a Cheque Request

1. View **My Cheques** as described above.
2. Click **Add** on the Home tab.
3. Input the following information:

Bank: Select from the drop-down list.

Date: Today's date will be shown by default; change as required.

Payee: Input the Payee's name or select a supplier from the drop-down list.

Value: **Input** the amount of the cheque.

Fee Earner: This will default to the current fee earner. Select a different fee earner from the drop-down list if required.

Third Party: Check the box if this is a third party cheque.

Narrative: **Input** a cheque narrative or click on the down arrow to pick from a list of narratives.

Notes: **Input** a note to the Accounts Department if required.

Cheque Payment: Tick box if Payee is to be paid by cheque

EFT: Tick box if Payee is to be paid the Electronic Funds Transfer

Matter: This will show the current case. To select a different case, click on the browse button for the matter list and **double-click** the required case.

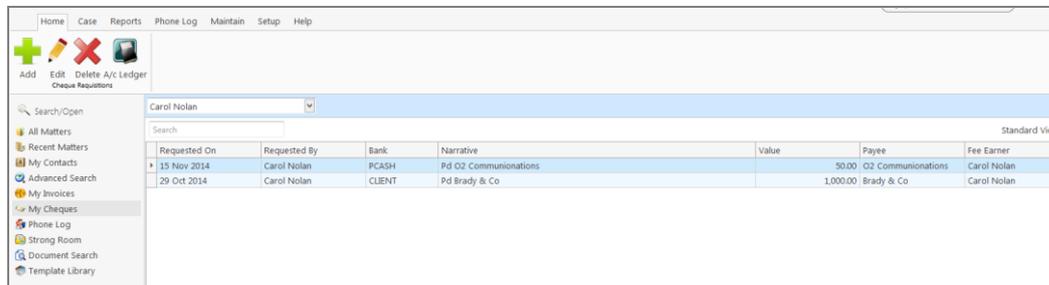
Notify Release: Check this box if you want an email to be sent to the Accounts Department when the cheque has been released.

Ledger Narrative: By default to the cheque narrative will be shown but it can be amended either manually or by selecting from the drop-down list.

4. To release the cheque to accounts click **Release**. Alternatively to hold the cheque in your cheque list click **OK**.

How to View My Cheques

1. Click on Search/Open on the Navigation.
2. Click on **My Cheques** on the Navigation panel. A list of your draft cheques will be displayed.



Requested On	Requested By	Bank	Narrative	Value	Payee	Fee Earner
15 Nov 2014	Carol Nolan	PCASH	Pd O2 Communionations	50.00	O2 Communionations	Carol Nolan
29 Oct 2014	Carol Nolan	CLIENT	Pd Brady & Co	1,000.00	Brady & Co	Carol Nolan

3. To view the request, double click on the required line.

How to Edit a Cheque Request

1. View **My Cheques** as described above.
2. Select the cheque you want to edit.
3. Click **Edit** on the Home tab.
4. Make the required changes.
5. Click **OK** to save the changes or **Release** to save the changes and send to Accounts.

How to Delete a Cheque Request

1. View **My Cheques** as described above.
2. Select the cheque you want to delete.
3. Click **Delete** on the Home tab.

How to Release a Cheque Request

1. View **My Cheques** as described above.
2. **Double click** on the cheque you want to release.
3. Click on the **Release** button at the bottom right of the Cheque Request dialogue box.

How to view the A/C Ledger

1. View **My Cheques** as described above.
2. Click on the **A/c Ledger** icon on the Home tab. The accounts ledger will be displayed.



Case: BLA001/0001		Gordon T. Black		Tel: 01 4766666		
		RTA Walkinstown Crossroads, G. Black		F/e: BS		
Search						
Date	Ref	Narrative	Billing A/c	Outlay A/c	Client Current	Deposit A/c
12 May 2011	pc	Stephen Keogh Senior Counsel Fees		3,230.00		
30 Apr 2010	pc	Pd Commissioner for Oaths		55.00		
30 Mar 2010	pc	Pd Swearing fees		24.00		
02 May 2012	Ld	Lodged fees	(73,800.00)			
18 Apr 2012	Inv 321	Invoice: Fees:60000 Outlay:0 VAT:13800	73,800.00			
19 Jun 2010	5887	Pd Mr Gordon T Black settlement less fees as agreed			12,548.00	
20 Oct 2011	509818	Pd cLIENT			2,036.72	
30 Jul 2010	500178	Pd Gordon T Black balance due to client			375.30	
24 Apr 2010	2390	Pd Dr Simon Young Medical Report		250.00		
15 Mar 2010	2266	Pd PIAB		50.00		
12 May 2011	218	Invoice: Fees:635 Outlay:379 VAT:133.35	1,147.35			
12 May 2011	218	To Invoice 218		(55.00)		
12 May 2011	218	To Invoice 218		(250.00)		
12 May 2011	218	To Invoice 218		(24.00)		
12 May 2011	218	To Invoice 218		(50.00)		
30 May 2010	1739	Lodged settlement agreed			(13,750.00)	
10 Jun 2010	1654	Lodged on a/c fees & vat			(1,210.00)	
20 Oct 2011	123456	Lodged part payment on a/c	(1,000.00)			
26 Oct 2011	1234545	Bill from Airtricity		106.61		
07 Aug 2015		FN: 500.00 Gordon T. Bl... Fees: 500.00 Outlay: 0.00 Vat: 0.00				
Client A/c Reserve			0.00			
			147.35	3,336.61	0.02	0.00

Chapter 14: The Debt Ledger

How to View the Debt Ledger

1. **Open** a case in the **Case Diary**.
2. Click on **Debt Ledger** in the **Case diary** navigation panel. The Debt Ledger will be displayed.

How to add the original debt

1. **Open** a debt case in the **Case Diary**.
2. Click on **Debt Ledger** on the **Case diary** navigation panel. The following screen will appear.

Case: FLY001/0001		Jack Flynn		Telt: 01-569 7412										
Sale of 10 Rose Lawn, Blanchardstown, Dublin 17		F/r: CN												
Original Debt Amount	0.00	Total Collected To-date	0.00	<input type="button" value="Post Payment"/>										
Interest To-date	0.00													
Recoverable Cost To-date	0.00													
				Outstanding 0.00										
Start Date	12 Feb 2016	Record No												
Your ref		Matter Status												
User3		Charge Arrangement	NIL											
Comments:														
Matter Code	Date	Description	Method	Type	Payment	Principal Paid	Interest Paid	Cost Paid	Interest Due	Cost Due	Remitted	Held Date	Posting Ref	Reference

3. **Input** the Original Debt amount.
4. Click the check mark beside the amount to confirm.

Note: the **Balance of Debt** will update automatically as postings are made.

How to Post a Payment

1. Click on **Debt Ledger** on the **Case diary** navigation panel.
2. Click **Post Payment**.

Original Debt Amount	50,000.00	Total Collected To-date	5,600.00	<input type="button" value="Post Payment"/>
Interest To-date	2,652.05			
Recoverable Cost To-date	60.00			
				Outstanding 47,112.05

Input the following information on the **Post Payment** dialogue box:

The screenshot shows a 'Post payment' dialog box with the following fields and values:

Field	Value
Matter Code	IBS001/0001
Date	04 May 2016
Transaction Date	04 May 2016
Reference	1425
Type	Direct Payment
Payment Method	Cheque
Value	305.00
Principal Paid	250.00
Principal Status	Part Payment
Costs Paid	50.00
Costs Status	Part Payment
Interest Paid	5.00
Interest Status	Part Payment
Description Paid	3 of 5 payments

Date: The date will default to today's date; amend if required.

Reference: **Input** a reference.

Type: Select the **payment type** from the drop-down list.

Payment Method: Select the **payment method** from the drop-down list.

Value: **Input** the amount of the payment.

Principal Paid: **Input** the amount of the payment to be allocated to the principal.

Principal Status: Select the **Principal Status** applicable from the drop-down list.

Costs Paid: **Input** the amount of the payment to be allocated to costs.

Costs Status: Select the **Cost Status** applicable from the drop-down list.

Interest Paid: **Input** the amount of the payment to be allocated to interest.

Interest Status: Select a status from the drop-down list.

Description: **Input** a description for this payment.

- Entry Date:** The **date** will default to today's date.
- Enter By:** The **handler code** will be entered by default.
- Posting Ref:** The next **reference** in the sequence will appear.
- Remitted:** Automatically populated.
- Date Remitted:** Enter the **date** the payment was received
- Held Date:** Used for the Revenue Module only.
- Bounced:** Tick if the payment is returned unpaid by the bank.

- Click **OK** to post the payment. The debt balance will update.

NOTE: Allocation relates to the Revenue Module only.

How to Post Interest

- Click on **Post Interest**.

2. Input the following information on the **Post Interest** dialogue box:

Term: Select Monthly, Yearly etc. from the drop-down list.

Rate at: **Input** the rate of interest

From: **Input** the start date or click the down arrow to select from the calendar.

To: **Input** the end date or click the down arrow to select from the calendar.

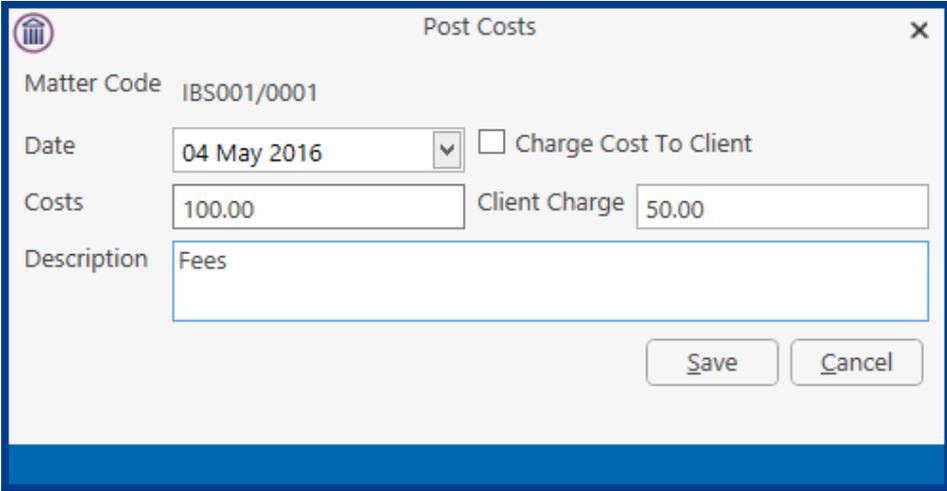
On: **Input** the amount on which the interest is to be calculated.

 **NOTE:** Once the information is provided the interest will calculate automatically and will then be displayed in the Calculated Interest box.

3. Click **Save** to post the interest and the balance will automatically update.

How to Post Recoverable Costs

1. Click on **Debt Ledger** on the **Case diary** navigation panel.
2. Click on **Post Costs**.



The screenshot shows a dialog box titled "Post Costs" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Matter Code:** IBS001/0001
- Date:** 04 May 2016 (with a dropdown arrow) and an unchecked checkbox labeled "Charge Cost To Client".
- Costs:** 100.00 (input field) and **Client Charge:** 50.00 (input field).
- Description:** Fees (input field).
- Buttons:** Save and Cancel.

3. Input the following information on the Post Costs dialogue box

Date: The date will default to today's date amend if required.

Costs: Input an amount for the cost or select from the drop-down list.

Description: **Input** a description of the cost.

Charge cost to Client: Check the box if the cost is chargeable to the client

Client Charge: Input the amount of the cost chargeable to the client.

4. Click **Save** to post the cost, the balance will update.

How to Amend an Entry

1. Click **Debt Ledger** on the **Case diary** navigation panel.
2. Double click on the entry you want to amend.
3. Amend as required and click **Save** to post the change.

How to Print a Debt Ledger Report

1. Click on **Debt Ledger** on the **Case diary** navigation panel.
2. Click on **Print** on the Home tab. The following dialogue box will appear.
3. Click on the Run Button a report will be generated see the following example.

Date	Method	Type	Value	Premium Paid	Costs	Costs Paid	Interest	Interest Paid
25/08/2008	Costs		0.00	0.00	60.00	0.00	0.00	0.00
26/08/2008	Interest		0.00	0.00	0.00	0.00	2,862.00	0.00
26/08/2008	Cheque	Receipt	6,000.00	6,000.00	0.00	0.00	0.00	0.00
26/08/2008	Cheque	Receipt	800.00	800.00	0.00	0.00	0.00	0.00

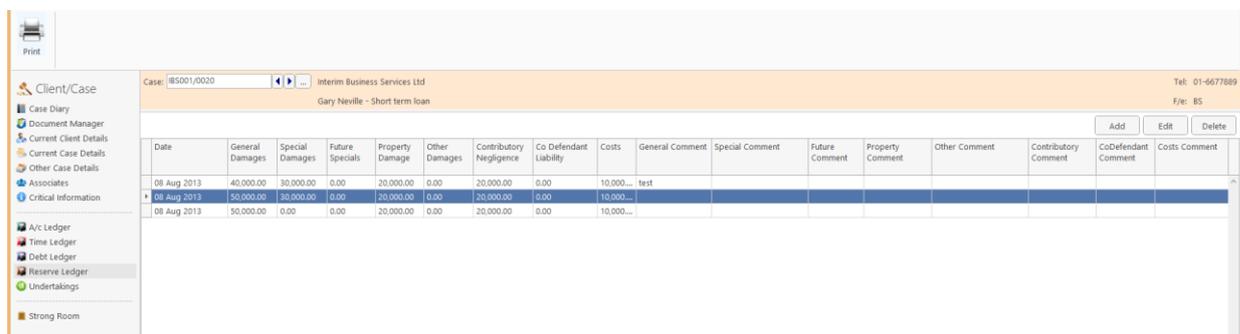
4. Click **Print** on the Report Toolbar to send the report to the printer.

Chapter 15: The Reserve Ledger

The reserve ledger is used in litigation and medical negligence cases to make provision for awards of damages.

How to View the Reserve Ledger

1. **Open** a case in the **Case Diary**.
2. Click on **Reserve Ledger** on the **Case diary** Navigation panel. The Reserve Ledger will be displayed.

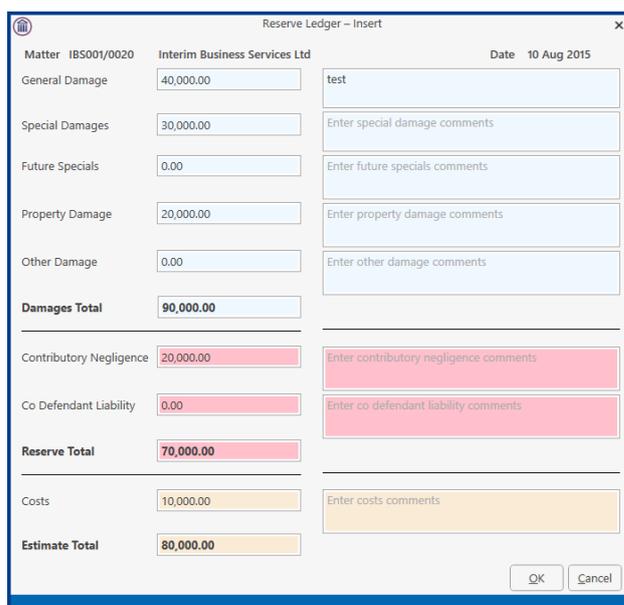


The screenshot shows the Reserve Ledger interface for Case: IBS001/0020, Interim Business Services Ltd. The table displays the following data:

Date	General Damages	Special Damages	Future Specials	Property Damage	Other Damages	Contributory Negligence	Co Defendant Liability	Costs	General Comment	Special Comment	Future Comment	Property Comment	Other Comment	Contributory Comment	CoDefendant Comment	Costs Comment
08 Aug 2013	40,000.00	30,000.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000.00	test							
08 Aug 2013	50,000.00	30,000.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000.00								
08 Aug 2013	50,000.00	0.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000.00								

How to Add an Entry

1. Click on **Reserve Ledger** on the **Case diary** Navigation panel.
2. Click **Add** on the Home tab. The **Reserve Ledger – Insert** dialogue box will appear.



The screenshot shows the 'Reserve Ledger – Insert' dialogue box for Matter IBS001/0020, Interim Business Services Ltd, dated 10 Aug 2015. The form contains the following fields and values:

General Damage	40,000.00	test
Special Damages	30,000.00	Enter special damage comments
Future Specials	0.00	Enter future specials comments
Property Damage	20,000.00	Enter property damage comments
Other Damage	0.00	Enter other damage comments
Damages Total	90,000.00	
Contributory Negligence	20,000.00	Enter contributory negligence comments
Co Defendant Liability	0.00	Enter co defendant liability comments
Reserve Total	70,000.00	
Costs	10,000.00	Enter costs comments
Estimate Total	80,000.00	

Buttons: OK, Cancel

Input an estimated amount and description for each of the following that applies:

General Damages
Special Damages
Future Specials
Property Damage
Other Damage

Next, estimate, and input a description for, the following, which are expected to reduce the client's liability.

Contributory Negligence
Co Defendant Liability

Finally, input an estimate of the Costs.

The **Damages Total**, **Reserve Total** (Damages Total less Contributory Negligence and Co-Defendant Liability) and **Estimate Total** (Reserve Total plus Costs) will be calculated automatically.

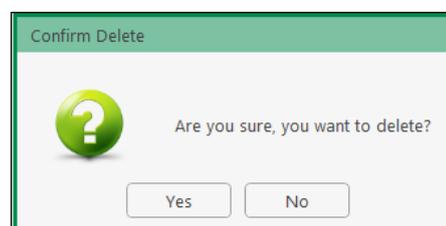
3. Click **OK** to add the entry.

How to Edit an Entry

1. Click **Reserve Ledger** on the **Case diary** Navigation panel.
2. Select the **entry** you want to edit, then click **Edit** on the Home tab. The **Reserve Ledger — Insert** dialogue box (see above) will appear.
3. Make the required changes.
4. Click **OK** to save the changes.

How to Delete an Entry

1. Click **Reserve Ledger** on the **Case diary** Navigation panel.
2. Select the **entry** you want to delete, then click **Delete** on the Home tab.
3. You will be asked to confirm the deletion.
4. Click **Yes** to confirm.



How to Print the Reserve Ledger

1. Click **Reserve Ledger** on the **Case diary** Navigation panel.
2. Click **Print** on the Home tab.
3. A report will run; to print the report, click the Print icon on the report toolbar.

Chapter 16: Phone Log

Viewing, Searching and Sorting the Phone Log

How to view the Phone Log

1. Click on **Search/Open** on the Navigation bar.
2. Click **Phone Log** on the Navigation panel.

Case Code	Date	Name	Who	Message	Description
TJF001/0001	06 Jul 2015	TJ Fox	AM	Caller: PTFSB - Branch Manager Branch Manager called to say a payment was rece...	Outstanding debt to PTFSB Bank.
TJF001/0001	06 Jul 2015	TJ Fox	CN	Spoke with solicitors for the Building Society to try and arrange a payment plan. T...	Outstanding debt to PTFSB Bank.
BRE001/0001	03 Jul 2015	Mike Breeze	CN	Caller: Mike Breeze Wants to discuss settlement options with Defendant. Wants to...	Broken left leg
FLY001/0002	03 Jul 2015	Jack Flynn	CN	Caller: James Bay Draft Contracts are ready for review.	Purchase of 16 The Haystack, Terenure, Dublin 6
SHM001/0001	02 Jul 2015	Bart Simpson	CN	Called client to remind him to send back the papers	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6
FLY001/0001	02 Jul 2015	Jack Flynn	CN	Called client to remind him to send back the papers	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6
BES001/0002	03 Feb 2015	Business Time Limited	BS	Phone Call	Shareholding Agreement
BES001/0001	03 Dec 2014	Business Time Limited	BS	Phone Call to Harold Worth	Lease of Unit 33, Eastgate Avenue, Dublin 12.
NOL001/0001	04 Sep 2014	Paula Nolan	CN	test test test	Paula Nolan V Joe Smith
ABB001/0001	08 Aug 2014	George J Abbott	MK	Telcon with etc; etc	Sale 45 Somersset Road, Dublin 6
AI001/0004	29 May 2014	Allied Investment Group	BS	Sean enquired about third party cover. I informed him that the customer had com...	Mark Twain -> Hoover Services
AI001/0003	29 May 2014	Allied Investment Group	BS	Frank phoned Claims team to follow up on file details	Zara Kennedy -> Carl Indigo
AI001/0002	27 May 2014	Allied Investment Group	BS	Alan phoned regarding uncompleted claims form	Garry Barlow -> Herid Talent Services
BEC001/0006	20 May 2014	Angela Beck	BS	Phone lender for redemption statement - Any note	14 Windy Arbor, Surbiton, Surrey SU1 2WW
DIU001/0001	19 May 2014	Paul Duggan	BS	Phone buyers' solicitors; check buyers' full names	21 Clonard Village, Chiswick, London W5 8NN
BL0002/0001	19 May 2014	David Bloggs	BS	Phone lender for redemption statement	6 Hill Street, Cork, Surrey ST56 6Y
DIU002/0001	09 May 2014	Paul Duggan	BS	Phone buyers' solicitors; check buyers' full names	21 Clonard Village, Chiswick, London W5 8NN
DIU001/0001	07 May 2014	Paul Duggan	BS	Phone lender for redemption statement	21 Clonard Village, Chiswick, London W5 8NN
DIU001/0001	29 Apr 2014	Allied Investment Group	BS	Phone Call to discuss potential damages and costs.	Noel Brown -> Jones Services Ltd
ABB002/0001	27 Mar 2014	Abbie Lynch	BS	Type in here any conversation details Call from: Abbie Lynch Phone No: +353-87-8...	Commercial Lease - 5 Main Street, Donnybrook.
FLY001/0002	23 Mar 2014	Jack Flynn	CN	Phone Call from Jack Flynn re: the purchase of 16 The Haystack, Terenure, Dublin 6	

3. The **Phone Log** will open displaying all recorded calls.



Tip to refresh the phone log click **Phone Log** on the Home tab.

Search the Phone Log

1. Open the Phone Log.
2. Click in the search box.
3. Input the search terms.
4. To clear the search, click the Clear button to the right of the search box.



How to Sort the Phone Log

1. Open the Phone Log.
2. To Sort by column click on a column heading, e.g. Name.
3. To clear the sort right, right-click on the column heading and select **Clear Sorting** from the pop-up menu.

	Sort Ascending
	Sort Descending
	Clear Sorting
	Group By This Column
	Show Group Panel
	Show Column Chooser
	Best Fit
	Best Fit (all columns)
	Filter Editor...

How to Filter the Phone Log

1. Open the Phone Log
2. To filter move your mouse over the column heading until a pin appears.

Search					
	Case Code	Date	Name	Who	Message
✓	TJF001/0001	06 Jul 2015	(Blank)		Caller: PTSB - Branch Manager Branch Manager called t
✓	TJF001/0001	06 Jul 2015	TJ Fox		Spoke with solicitors for the Building Society to try and
✓	BRE001/0001	03 Jul 2015	Mike		Caller: Mike Breeze Wants to discuss settlement options
✓	FLY001/0002	03 Jul 2015	Jack F		Caller: James Bay Draft Contracts are ready for review.
✓	FLY001/0001	02 Jul 2015	Jack F		Called client to remind him to send back the papers
	SIM001/0001	02 Jul 2015	Bart S		Called client to remind him to send back the papers
	BES001/0002	03 Feb 2015	Angela Beck		Phone Call
✓	BES001/0001	03 Dec 2014	Busine		Phone Call to Harold Worth
✓	NOL001/0001	04 Sep 2014	Paula		test test test
✓	ABB001/0001	08 Aug 2014	Georg		Telcon with etc etc
✓	AIG001/0004	29 May 2014	Allied		Sean enquired about third party cover. I informed him t
✓	AIG001/0003	29 May 2014	Allied		Frank phoned Claims team to follow up on file details
✓	AIG001/0002	27 May 2014	Allied		Alan phoned regarding uncompleted claims form
✓	BEC001/0006	20 May 2014	Angel		Phone lender for redemption statement - Any note
✓	DUG001/0001	19 May 2014	Paul D		Phone buyers' solicitors, check buyers' full names
✓	BLO002/0001	19 May 2014	David		Phone lender for redemption statement
✓	DUG001/0001	09 May 2014	Paul Duggan	BS	Phone buyers' solicitors, check buyers' full names
✓	DUG001/0001	07 May 2014	Paul Duggan	BS	Phone lender for redemption statement

3. Click on the pin to see a list of filter options click on the required filter.
4. To clear the filter, select **(All)** from the filter drop-down menu (alternatively, right-click the column heading and select **Clear Filter** from the pop-up menu).

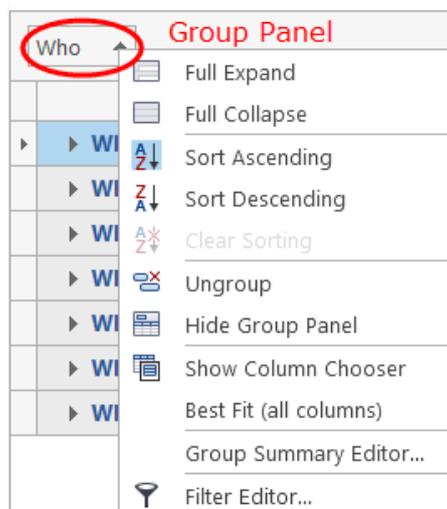
How to Group column headings in the Phone Log

1. Open the Phone Log.
2. Right-click on a column heading to see the pop-up menu.
3. Select **Group By This Column** from the menu. The following example shows the results.

	Case Code	Name	Date	Message
▶	Who: AM			
▶	Who: BS			
▶	Who: CN			
▲	Who: JP			
✓ !	BOU001/0001	Claire Bourke	24 Oct 2010	Telephone Attendance
✓	BOU001/0001	Claire Bourke	17 Jul 2010	Telephone Attendance
✓	SMI001/0001	Smith & Green	20 Jan 2011	Caller: john smith - harry rang re contracts
▶	Who: MK			
▶	Who: MW			
▶	Who: SK			

4. To remove the grouping, if the Group Panel is hidden, right-click on a column heading and select **Show Group Panel** from the pop-up menu.

- When the **Group Panel** is shown, right-click on the column name in the Group Panel.



- Select **Ungroup** from the pop-up menu.

How to add a phone message

- Open** the phone log.
- Click **Add** on the Phone Log tab.

Input the following details on the Add Phone Log dialogue box:

Case Code: By default this will be *ZZZZZ/ZZZZ*, which is used for messages that are not connected with a case. To select a case click on the browse button and search for the required case.

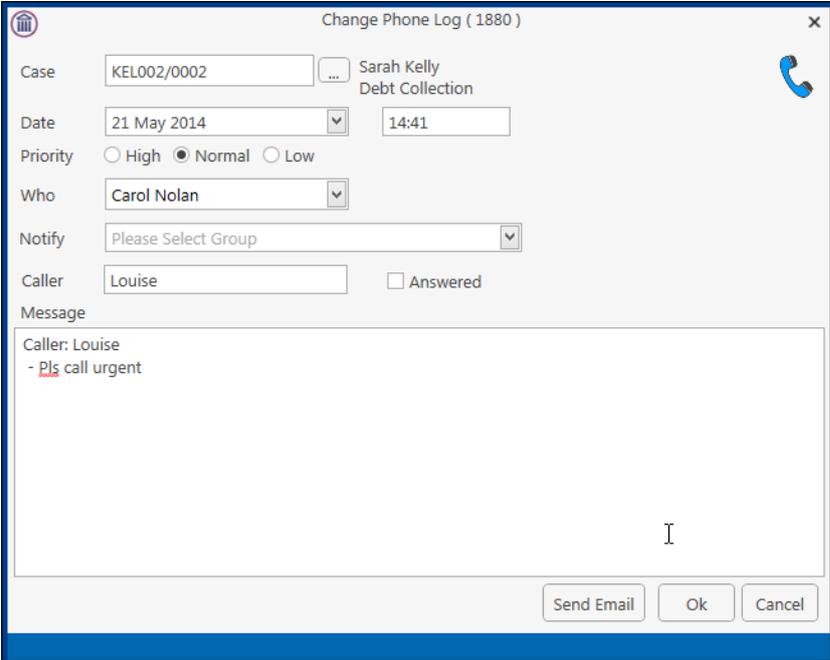
Date/Time: This will show the current date and time; amend if required.

- Priority:** Select the priority of the message (High, Normal or Low).
- Who:** Who is the message for. You may select from the drop-down list.
- Notify:** To notify somebody else, in addition to the addressee of the message, select from the drop-down list.
- Caller:** Input the caller's name.
- Message:** Input the message.
- Answered:** Check this box only when the message has been answered; when it is checked, the message will not appear in the addressee's task list.

3. Click **OK**. The message will appear in the selected person's task list.
4. To send an email click **Send Email**.

How to edit a phone message

1. In the phone log, select the message you want to amend.
2. Click **Edit** on the Phone Log tab.



Change Phone Log (1880)

Case: KEL002/0002 Sarah Kelly
Debt Collection

Date: 21 May 2014 14:41

Priority: High Normal Low

Who: Carol Nolan

Notify: Please Select Group

Caller: Louise Answered

Message
Caller: Louise
- PLS call urgent

Send Email Ok Cancel

3. Amend as required.
4. Click **OK** to save the changes.

How to delete a phone message

1. **Open** the phone log.
2. Select the message you want to delete.
3. Click **Delete** on the Phone Log tab. You will be asked to confirm the deletion.
4. Click **Yes**.

 **NOTE: If you delete a message it will be removed from the system completely.**

Chapter 17: Closed Cases

How to Search for Closed Cases

1. Click on **Search/Open** on the Navigation panel.
2. Select **All Matters** on the Navigation panel.
3. Click the **View** icon on the right of the window. The Standard View is shown by default.
4. Select the required View
 - **Closed Cases** to search only closed cases
 - **Open Cases** to search only open cases.
 - **Open and Closed Cases** to search both lists.
5. Input a search term in the search box; the search will update as you type.



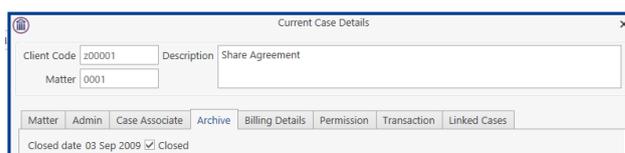
How to view the Archived Diary & Ledger of a closed case

1. Search for the closed case as described above.
2. Double click the required case to view the Case Diary.
3. Click on **A/C Ledger** on the Navigation panel to view the archived ledger.

 **Note** no amendments can be made in the Case Diary unless the case is reopened.

How to reopen a closed case

1. Search for the closed case as described above.
2. Double click to open in the case diary.
3. Click on **Current Case Details** on the Navigation panel, to see the Current Case Details screen.
4. Select the **Archive Tab** in Current Case Details.



5. Uncheck the box marked **Closed**. The case is now reopened.

How to close a Case

Before archiving a matter ensure that all balances are nil, all time is posted to the time ledger and all tasks in the case diary are marked as complete.

1. Click on **Search/Open** on the Navigation panel.
2. Select **All Matters** on the Navigation panel.
3. **Search** for the case in the normal way.
4. **Double click** to open in the Case Diary.
5. Click on **Current Case Details** on the Navigation panel, to view the Current Case Details screen.

The screenshot shows the 'Current Case Details' window with the following data:

Field	Value
Client Code	FLY001
Matter	0002
Description	Purchase of 16 The Haywain, Terenure, Dublin 6
Fee Earner	Carol Nolan
Secretary	Anne Mellon
Partner	Stephen Keogh
Department	Conveyancing
Work Type	Purchase
Old Reference	FLY001/001
File Ref	FLY002/001
Branch	Dublin Office
Case Plan/Type	Property Purchase
Case Status	Loan approval received

6. Select the **Archive Tab**. This will be greyed out if you don't have the required permissions.

7. Check the box marked **Closed**.

Current Case Details

Client Code: FLY001 Description: Purchase of 16 The Haywain, Terenure, Dublin 6

Matter: 0002

Matter Admin Additional Details Case Associate **Archive** Billing Details Permission Linked Cases

Closed Originally closed on

Date File Closed:

Location:

Archive Location:

File Barcode No:

Box Barcode No:

Expected Destroy Date: Please select date

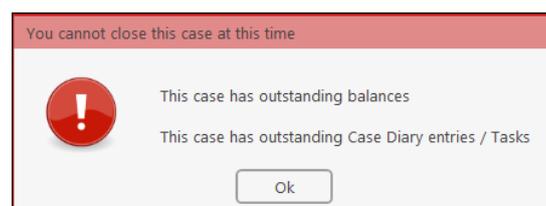
Actual Destroy Date: Please select date

Destroyed by: Select fee earner

File Number: 362

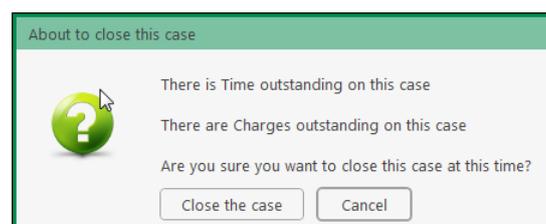
OK Cancel

8. If the case cannot be closed because there are uncompleted tasks or there is an account balance, a warning message will be displayed, giving the reason why the case cannot be closed.



Or

If there is unposted time or there are charges outstanding, an alert message will be displayed. In this case, you may proceed with the closure of the case or **Cancel** it.



Chapter 18: The Brief Wizard

This tool automates the task of generating a brief to counsel, saving you time. It amalgamates all the required documentation in chronological order into relevant sections, complete with a cover page, table of contents and pagination.

Important Steps for preparing your Brief

1. Review your documents in the **Document Manager** and ensure the necessary files are classified and the Document Date is correct as it will be in your brief. See **How to reclassify Documents** and **How to change the Document Properties** (p. 80)
2. If you cannot view or open a document from the Case Diary or Document Manager screen you will not be able to use this document in your brief.
3. Once you begin to generate your Brief you should not use your PC for any other purpose until the brief is completed. Several different programs will be used to generate the brief and running another program is likely to cause disruption to generation of the brief.
4. Please review the earlier part of this chapter (Document Manager, particularly p. 77 above) for details on how to rename and reclassify a document.

If you need assistance adding **Document Classes** please contact your Keyhouse administrator or support@keyhouse.assist.com

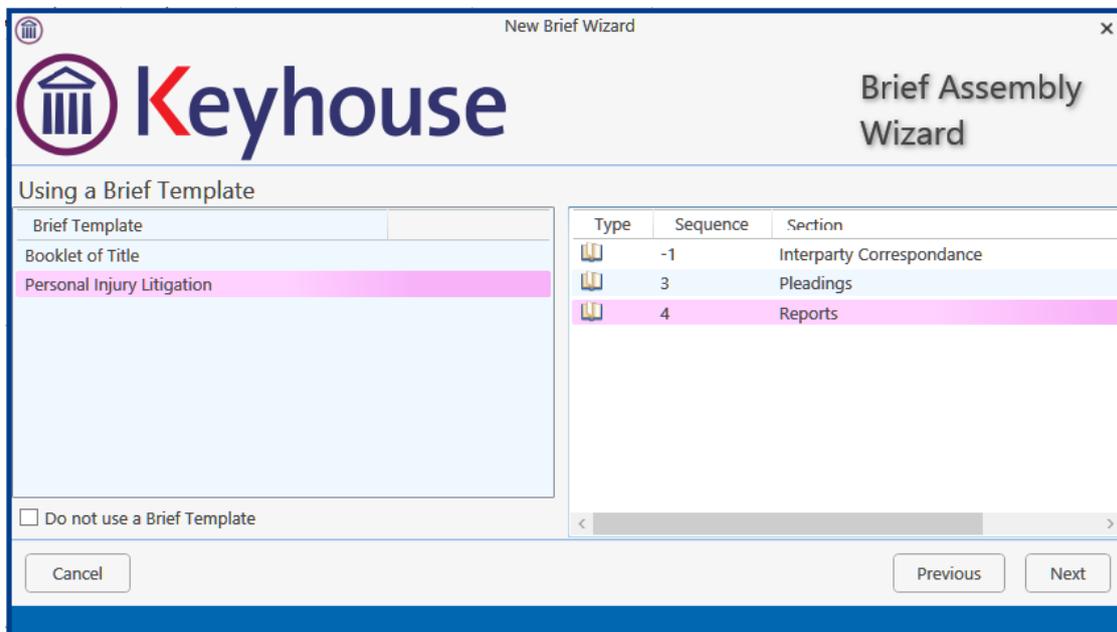
Assembling a Brief

1. **Open** a case in the case diary.
2. Click **Document Manager** on the Navigation panel.

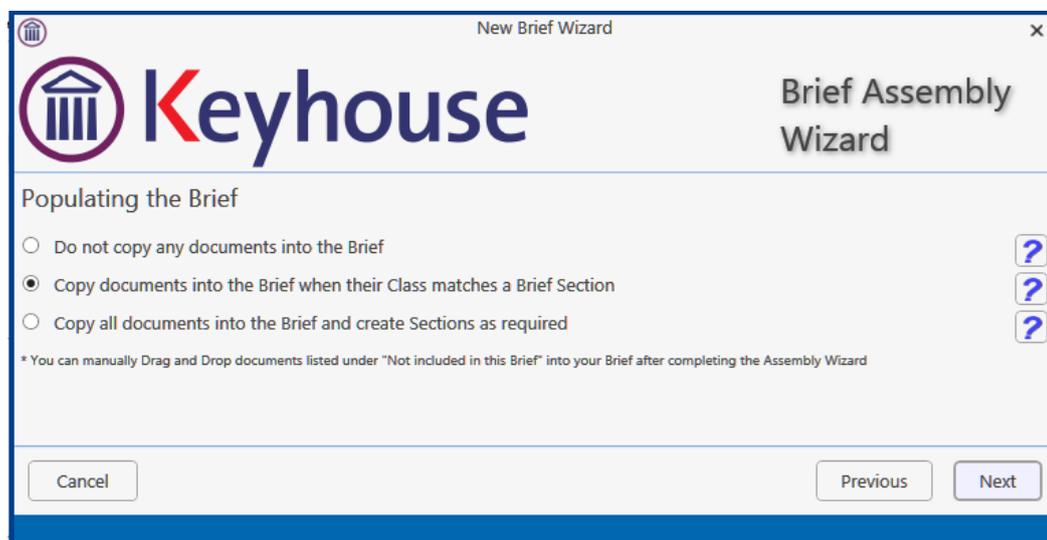
The screenshot shows the Keyhouse Case Management application. The top toolbar contains several icons, with the 'Compile Brief' icon (a green document with a checkmark) circled in red. Below the toolbar, the 'Client/Case' section shows the case name 'BAR002/0001' and the subject 'Sale of 1 High Street, Kells, Co Meath'. The main area displays a table of documents:

Type	Document Name	Diary Date	Version	Date	Document Class	Source	From	To	Subject	File Location
	afdafd	30 Nov 2015	1	30 Nov 2015	General	Case			Test Doc	t:\keyhouse\client documents\BAR002\0001\afdafd_
	Letter to Client Re Sale	30 Nov 2015	1	30 Nov 2015	General	Case			Test Doc	t:\keyhouse\client documents\BAR002\0001\Letter b
	Letter to Bank re Redemption Value	30 Nov 2015	1	30 Nov 2015	Letters/Interparty Corr...	Case			Letter to Bank re Redemption Value	t:\keyhouse\client documents\BAR002\0001\Letter b
	Contract of Sale	30 Nov 2015	1	30 Nov 2015	Pleadings	Case			Contract of Sale	t:\keyhouse\client documents\BAR002\0001\Contra
	Contract for Sale Draft 2	30 Nov 2015	1	23 Nov 2015	Opinions	Case			Contract for Sale Draft 2	t:\keyhouse\client documents\BAR002\0001\Contra
	Contract for Sale Draft 1	30 Nov 2015	1	23 Nov 2015	Opinions	Capture			Contract for Sale Draft 1	t:\keyhouse\client documents\BAR002\0001\Contra
	Letter to Insurance Company	18 Nov 2015	1	23 Nov 2015	Letters/Interparty Corr...	Case			Letter to Insurance Company	t:\keyhouse\client documents\BAR002\0001\Letter b
	Letter to Local Authority	19 Nov 2015	1	23 Nov 2015	Letters/Interparty Corr...	Case			Letter to Local Authority	t:\keyhouse\client documents\BAR002\0001\Letter b
	Letter to Lending Institution	20 Nov 2015	1	23 Nov 2015	Letters/Interparty Corr...	Case			Letter to Lending Institution	t:\keyhouse\client documents\BAR002\0001\Letter b
	Letter to Solicitor	23 Nov 2015	1	23 Nov 2015	Letters/Interparty Corr...	Case			Letter to Solicitor	t:\keyhouse\client documents\BAR002\0001\Letter b
	Letter to Client	20 Nov 2015	1	20 Nov 2015	Client Letters	Case			Letter to Client	t:\keyhouse\client documents\BAR002\0001\Letter b

3. Click **Compile Brief** on the Document Manager Home tab.
4. The Brief Assembly Wizard will start with a welcome screen. Click **Next** to continue.
5. If Brief templates have been set up on the system, you may either select one or check **Do not use a Brief Template**.



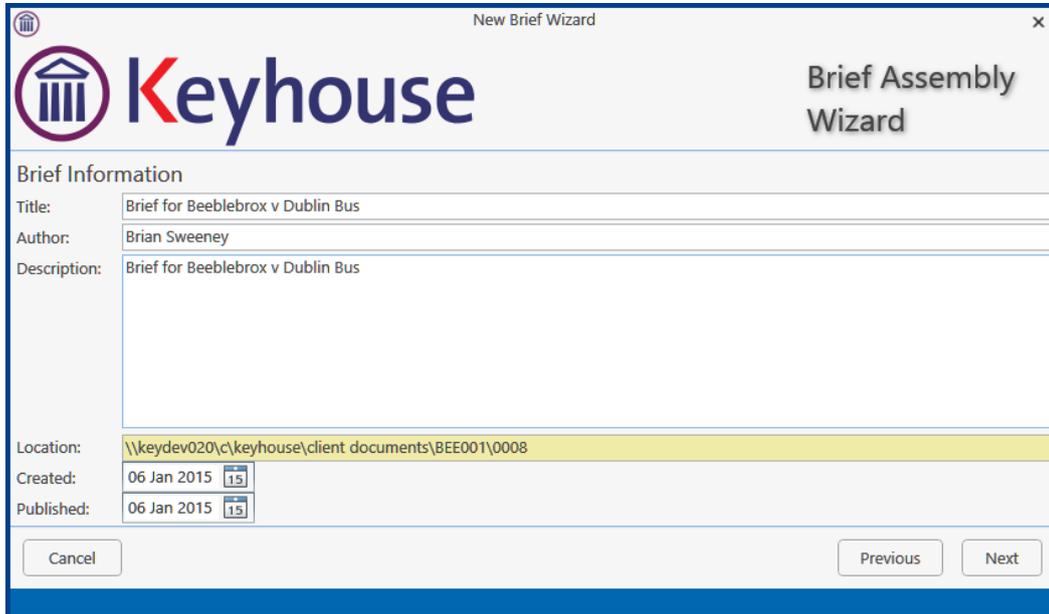
6. There are three options for populating the brief with documents:



- **Do not copy any documents in the brief:** No documents will be added to the brief automatically but you will be able to drag and drop documents from the Section **Not included in this Brief** into the appropriate section.
- **Copy documents into the brief when their Class matches a brief section:** Any document whose Document Class matches a section of the Brief will automatically be copied into that section.
- **Copy all documents into the brief and create sections as required:** Sections will be created for each Document Class which applies.

 **Tip:** for further information on each option click the question mark icon beside it.

- Click **Next** to continue to the **Brief Information** screen.



New Brief Wizard

Keyhouse Brief Assembly Wizard

Brief Information

Title: Brief for Beeblebrox v Dublin Bus

Author: Brian Sweeney

Description: Brief for Beeblebrox v Dublin Bus

Location: \\keydev020\c\keyhouse\client documents\BEE001\0008

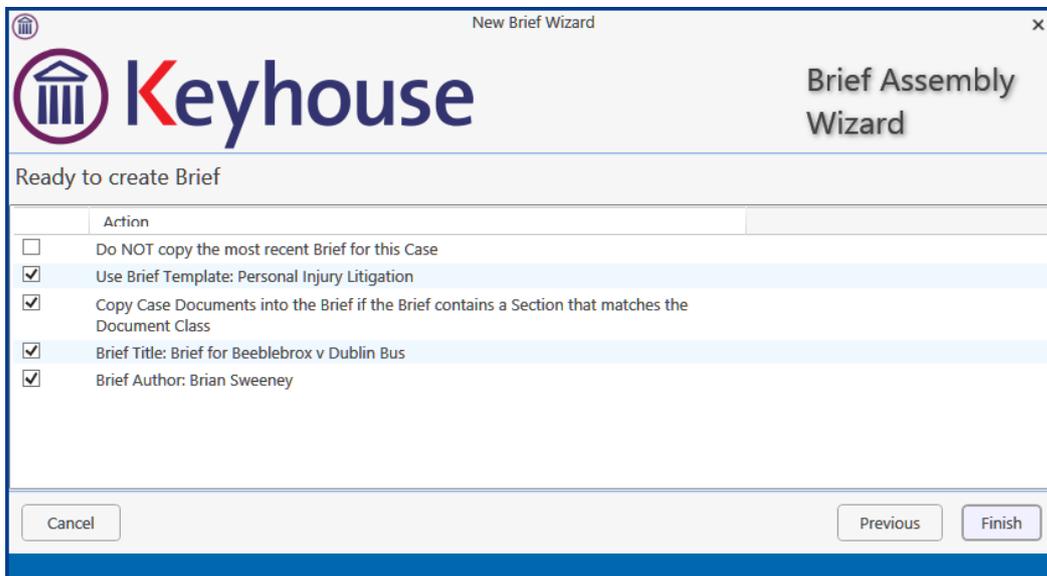
Created: 06 Jan 2015 15

Published: 06 Jan 2015 15

Buttons: Cancel, Previous, Next

You may accept the default information or amend as required.

- Click **Next** to continue to the final screen of the wizard, which will contain a summary of the options you have selected. You can make changes by checking and unchecking the boxes or click **Previous** to go back to an earlier screen.



New Brief Wizard

Keyhouse Brief Assembly Wizard

Ready to create Brief

Action
<input type="checkbox"/> Do NOT copy the most recent Brief for this Case
<input checked="" type="checkbox"/> Use Brief Template: Personal Injury Litigation
<input checked="" type="checkbox"/> Copy Case Documents into the Brief if the Brief contains a Section that matches the Document Class
<input checked="" type="checkbox"/> Brief Title: Brief for Beeblebrox v Dublin Bus
<input checked="" type="checkbox"/> Brief Author: Brian Sweeney

Buttons: Cancel, Previous, Finish

- When you are satisfied, click **Finish**.



Keyhouse Case Management (CN - Carol Nolan - 0424 / 0306)

Home Case Reports Phone Log Maintain Setup Help

Use Adobe PDF Viewer Show Preview Stay in original section Add Name Delete Brief Sections Create List New Brief Open Brief Re-order Brief Properties Finalise (Re)generate Open in Word Open in Adobe

Client/Case Case: FLY001/0001 Jack Flynn

Sale of House at: 4 The Mews, Rathfarnham, Dublin 6

Brief: Brief for Sale of House at: 4 The Mews Rathfarnham Dublin 6

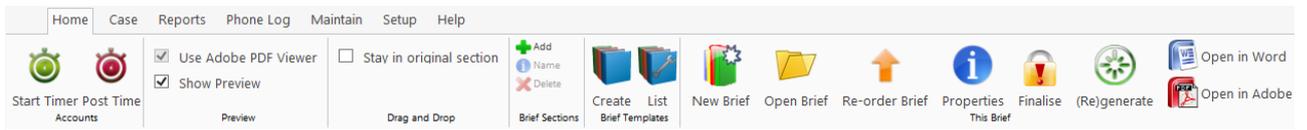
Search

Type	Document Name	Class	Document...	Action Pri...	Action Type
Section: 001	Client Correspondence (3 documents)				
Section: 002	Letters/Interparty Correspondance (9 documents)				
Section: 999	Documents Not Included in this Brief (25 documents)				

8. The sections in the brief will be displayed.

Brief Home tab

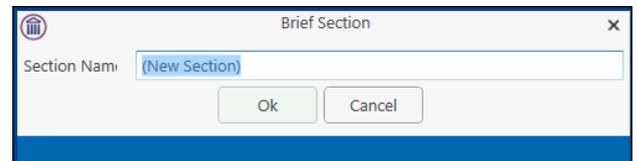
The Home tab in the Brief:



Brief Sections

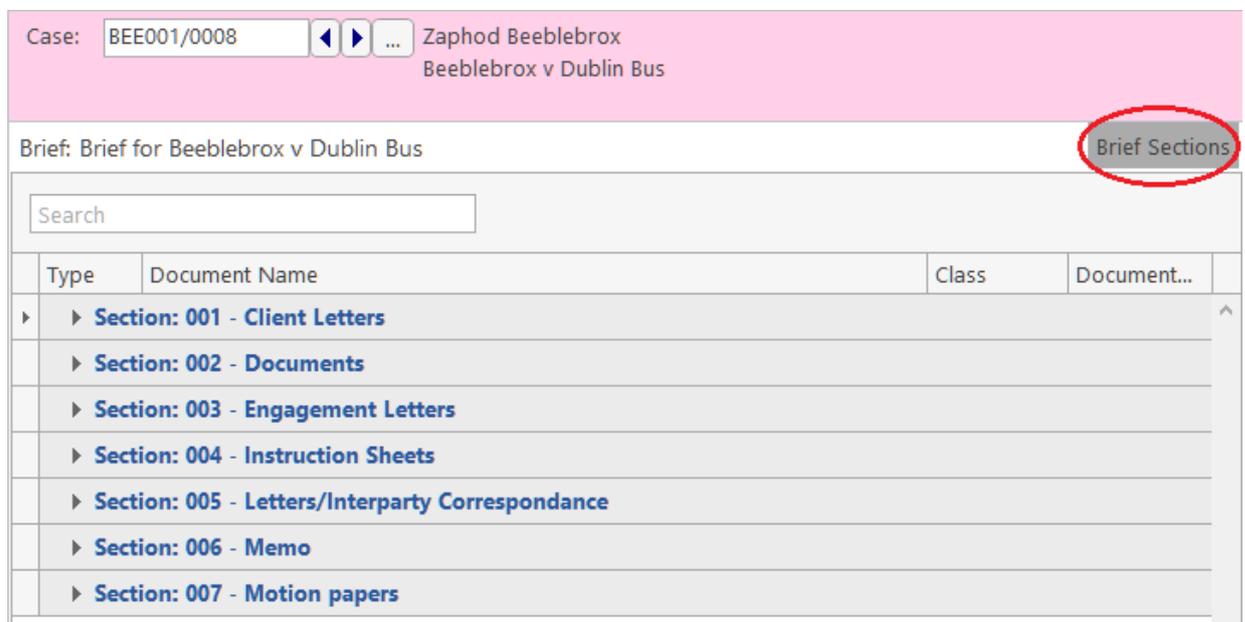
How to Add a Section

1. Click **Add** on the Home tab.
2. Name the new section.
3. Click **OK**.
4. The new section will appear in the **Section** list.



How to amend a Section Name

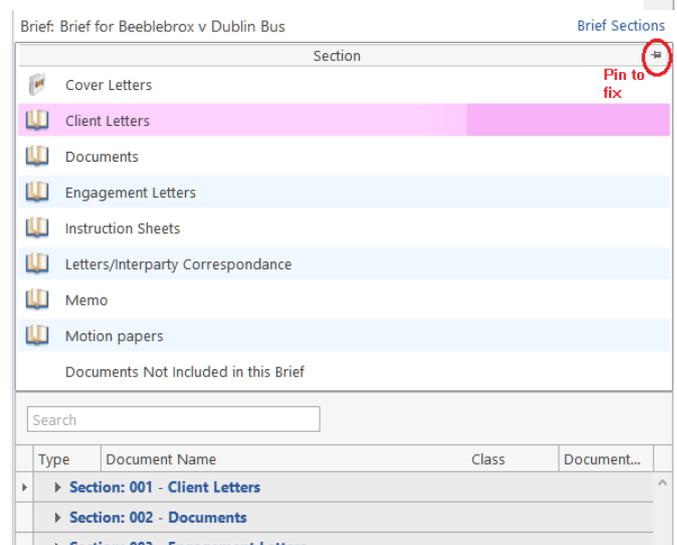
1. Click **Brief Sections** on the right of the brief screen



2. A list of sections will be expanded.

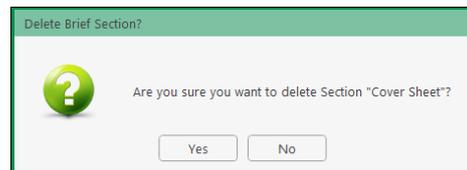
 **Tip:** To Show the list permanently click the pin.

3. Select the section you want to rename.
4. Click **Name** on the Home tab. Alternatively, right-click the section and choose **Section Name** from the pop-up menu.
5. Name the new section and click **OK** to confirm.



How to delete a Section

1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 170 above).
2. Select the **Section** you want to delete.
3. Click **Delete** on the Home tab. Alternatively, right-click the Section and choose **Delete Section** from the pop-up menu.
4. A message will ask you to confirm the deletion.
5. Click **Yes**.



How to change the order of Sections

1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 170 above)
2. Select the **section** you want to move.
3. Use the buttons on the Right Click Menu to change the position of the section in the brief.



Move the selected section **to the top** of the list of sections.

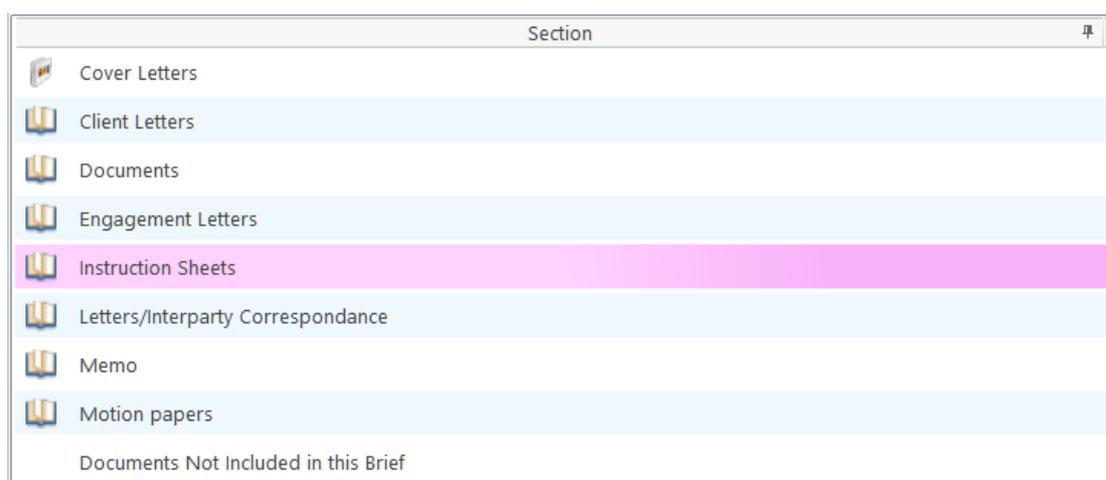
Move the selected section **up one position**.

Move the selected section **down one position**.

Move the selected section **to the bottom** of the list.

How to Move a document to a different section

1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 170 above)
2. Pin the **Brief Sections** so that they remain visible.
3. In the lower part of the window open the section containing the document which you want to move, by clicking on the arrow to the left of the section.

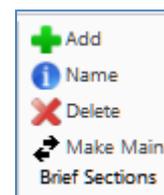


4. **Drag** the document to the upper part of the window and **drop** it into the required section. In the example above, one might select the document *Terms of Engagement* and drag it into *Instruction Sheets* (which is selected in the upper part of the window).

Type	Document Name	Class	Document...
▶ Section: 001 - Client Letters			
▶ Section: 002 - Documents			
▶ Section: 003 - Engagement Letters			
	Terms of Engagement	Engageme...	30 Sep 2014
▶ Section: 004 - Instruction Sheets			
▶ Section: 005 - Letters/Interparty Correspondance			

How to flag as a Cover or Main

1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 170 above).
2. Select the section required.
3. If the section is already designated as a **Cover** section, Click **Make Main** on the Home tab to make it a **Main** section. This command toggles between **Make Main** and **Make Cover**, depending on how the selected section is designated.

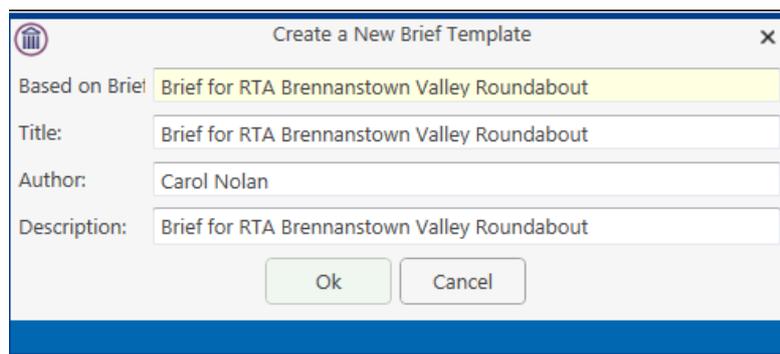


 **Main** sections are included in the Table of Contents; **Cover** sections are intended to contain cover letters and similar preliminary material.

Brief Options

Save current Brief as Template

1. Click **Create** on the *Brief Templates* section of the Home tab.
2. Edit the details in the dialogue box **Create a New Brief Template**



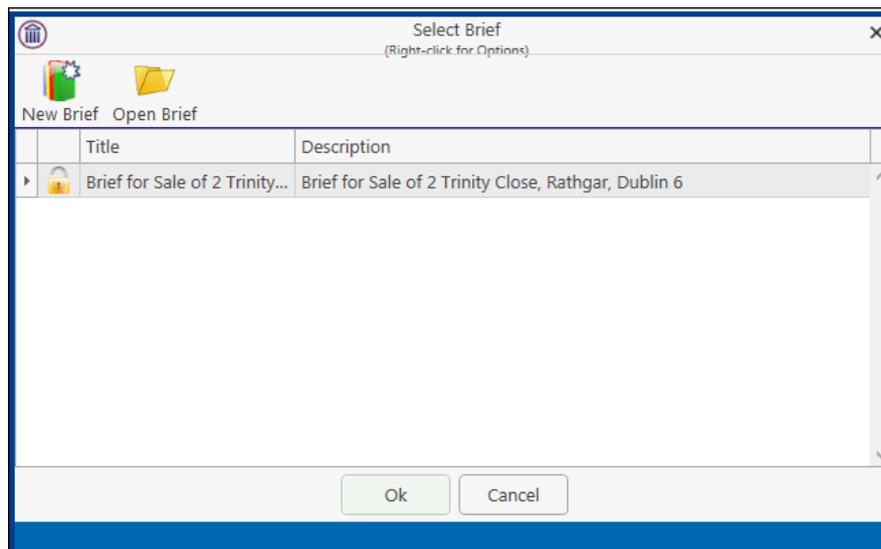
By default, the template title will be the same as the title of the Brief on which it is based. As it is to be

used as a template, it may be advisable to change it to something more generic.

3. Click OK.

How to Open a Brief

1. **Open** a case in the case diary.
2. Then click **Document Manager** on the Navigation panel to view the Document Manager.
3. Click **Compile Brief** on the Home tab in **Document Manager**. The **Select Brief** screen will appear.



4. Select the brief to open and click **Open Brief**.



Note if you are already working in the brief screen, you may click **Open Brief** on the Home tab.

Generate the Brief

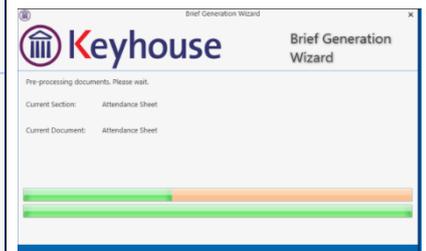
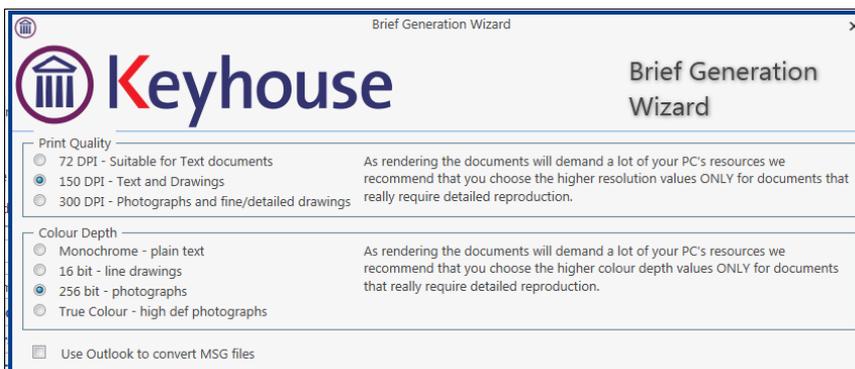
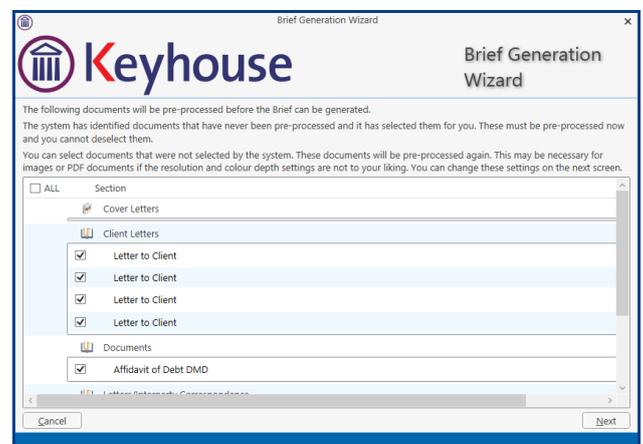
- ⊖ Before you generate the Brief, if you have any Microsoft Office applications running (e.g. Word, Excel, Powerpoint etc), save your work and close the application(s).
FAILURE TO DO THIS MAY RESULT IN LOSS OF DATA.

- ⊖ Once you begin to generate your Brief **you should not use your PC or laptop until the brief is completed.** Keyhouse calls on a number of programs during brief generation and trying to view/use another program will cause disruption to the brief.

How to (Re) Generate a Brief

1. Click **(Re)Generate** on the Home tab.
2. The Brief Generation Wizard will start.

The system may select some documents for pre-processing and ask if you want to select others which have not automatically been selected. The automatically selected documents cannot be unselected but you may tag others for pre-processing by checking the box beside each.
3. Click **Next**.
4. Select the **print quality** and **colour depth** required.

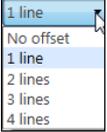


Check the box to use Outlook to convert MSG files.

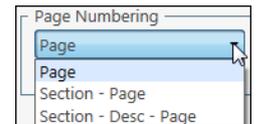
5. **Click Next.** A screen will show the progress of the document preprocessing.
6. When pre-processing has been completed, you will have the opportunity to set the print order of the brief, the contents and position



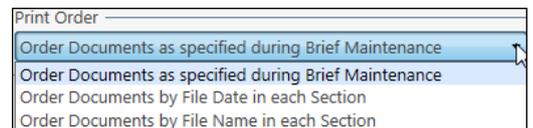
of the footer and the alignment of columns in the table of contents.

- The documents in each Section may be printed in ascending date order, in alphabetical order by filename or in the order in which they were added to the brief while it was being assembled or maintained.
- The footer offset is the minimum number of lines that must be maintained between the footer and the physical end of the page. 
- The options for page numbering in the footer are:
 - **Page**: Only the page number is shown;
 - **Section – Page**: The section number and the page number are shown;
 - **Section – Desc – Page**: The section number and description, and the page number are shown.

Check the box to include totals (e.g. “Page 5 of 158”).

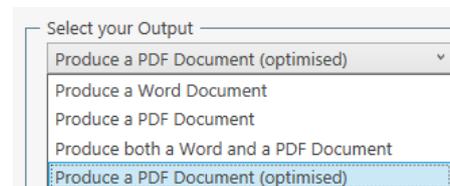


- You can set the footer font size and weight, or provide that there should be no footer.
- You may check the box to Left-Align the Table of Contents columns; if you leave the box unchecked, the page numbers will be right-aligned.



7. When you have selected the desired options for the print order of documents, the contents of the footer and the table of contents, click **Next**.

8. You will now choose the type of output. The options are a **Word** document, a **PDF**, or both of these. You may also choose to produce a folder of documents instead of a single document.



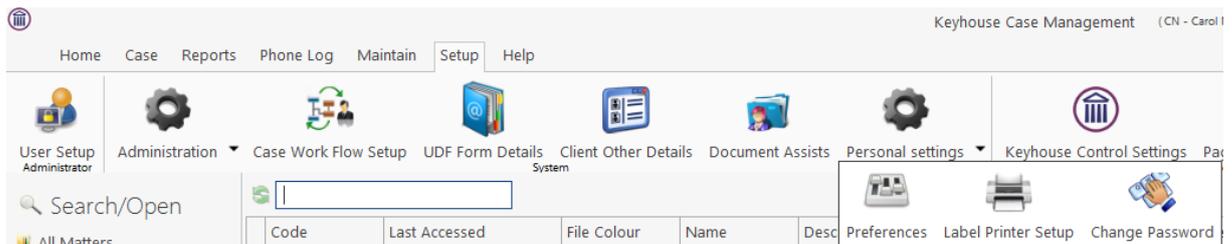
9. Click Finish. The brief will now be generated. This may take some time

Chapter 18 – Personalising your Keyhouse

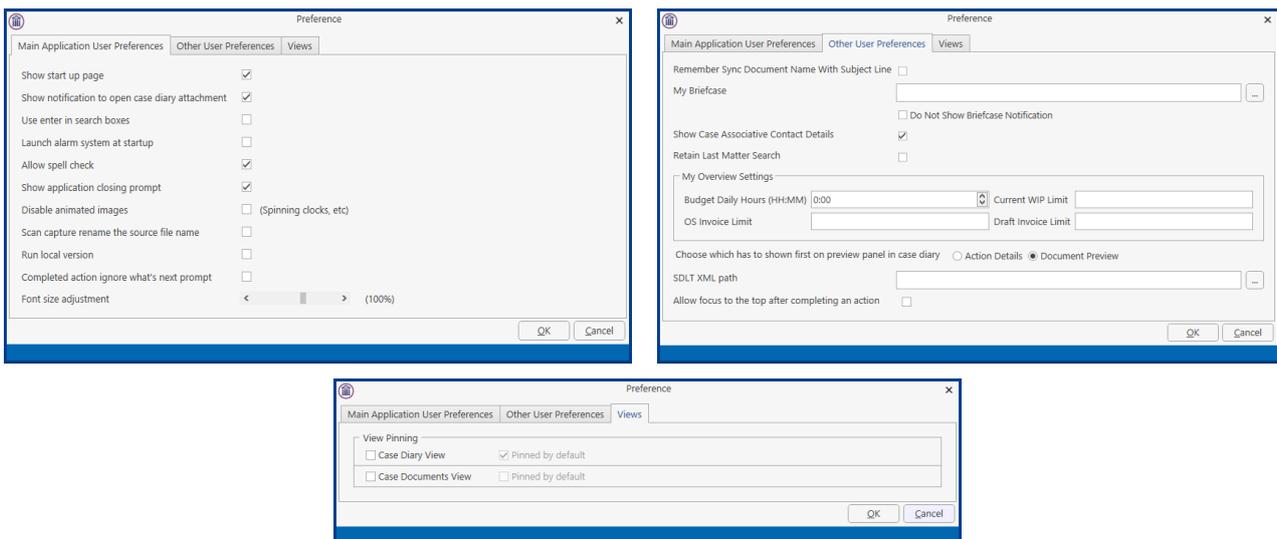
Setting your Preferences

Users can set system preference on their computers. To do this:

1. Go to the Setup Tab and select Personal Settings
2. Select Preferences



3. The following screens will appear.



4. Among the options that can be set up are:

Main Application User Preferences

Show Start up Page

This will give the user the Start up page which will allow the user to select the area of Keyhouse they wish to go to when they open the system i.e. Case/Open, Task or My Overview

Use Enter in Search Box

This will require the user to click Enter to start a search after the key words have been entered

Show Application closing prompt

When the user click the X to close the system, a prompt will appear asking if the user wants to exit the system, log on as a different user or cancel.

Scan Capture rename the source file name This will allow the user to rename a document in the scan capture folder with the name given to the document in Keyhouse.

Other User Preferences

Remember Sync Document Name with Subject Line

When you tick this box, it will allow you to automatically rename a document if you change the name of an action and vice versa.

Show Case Associative Contact Details

This will allow the user to see any contacts within an associate on the Associates Screen on the Case/Matter To ensure that the Advanced Search screen keeps the last search entered, tick this box.

Retain Last Matter Search

Allow focus to the top after completing an action

To ensure that the cursor stays at the top of the Case Diary when an action is completed, tick this box.

Views

When a user changes the view on a screen the view will stay as the user moves from matter to matter until the user changes it again. On this screen the user can choose to have the screen revert back to the default view as they move from matter to matter.

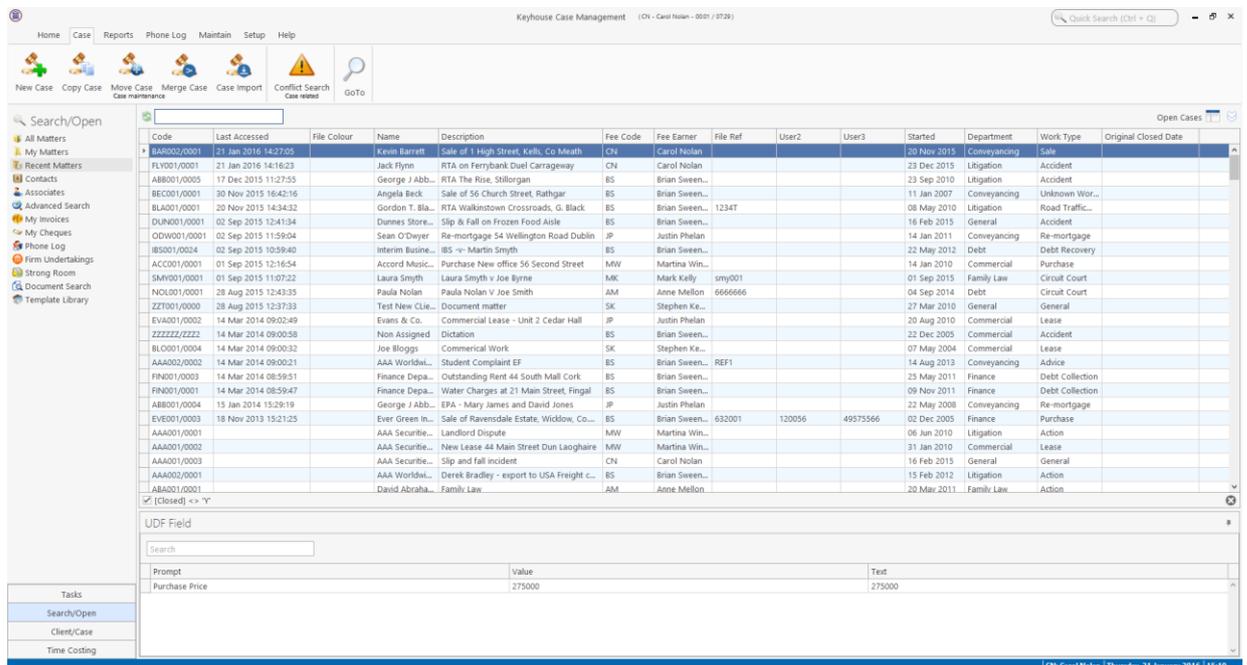
5. Set the Preferences required and click OK.

Creating User Views

Keyhouse gives you the option to change the views on screens to allow you to find and see information more easily. It allows the user to create views tailored to their requirements. All new views must be saved or they will revert back to the original view when you leave the screen. View can be created where ever you see this icon.

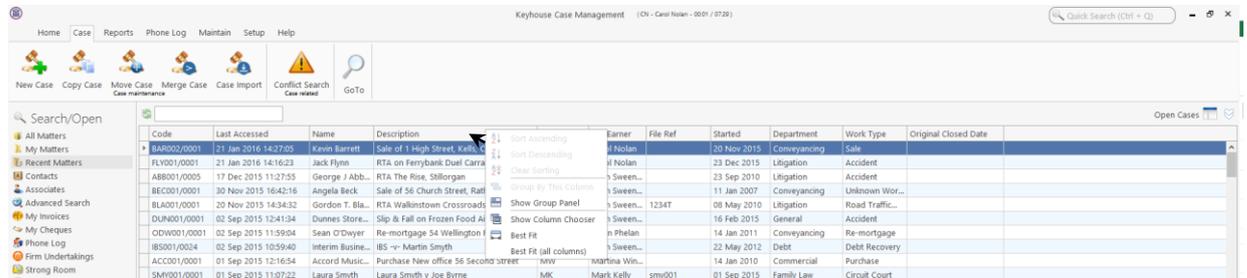
Creating a View

1. Go to the screen where the view is to be created



2. Make the changes to the screen:

To remove a heading no longer required, click on the heading and drag it off the Header Row.
 To add new headings right click on the Header Row and select **Show Column Chooser**. All available headings for this section are list here.



3. Select the required heading and drag it to the Header Row ensuring it is place between existing headings. Use the blue arrows as a guide.



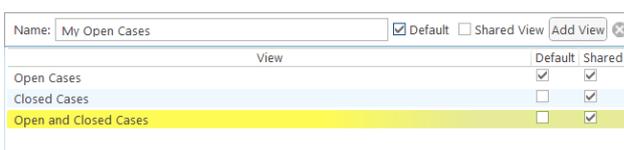
4. To reposition a column, click on the column and drag it to its required location, again using the blue arrows as a guide.

5. Once all required headings are in position, click on the view button  in the top right corner of the screen.



- Right click on **View** and click on **Add or Edit**.
- In the Name box enter the name of the view.
- If the view is to be the default view, click the **Default** box the select **Add View**.

 **Note** if you have Administration Rights you can make the view available to all users by clicking **Shared View**.



 **Note** It is also possible to filter by headings and save the result as a view.

Change a View

1. Make the required changes.
2. Click on the View Icon
3. Right click on the View to be changed and select **Add or Edit**
4. Click **Change View**.

Name: My Open Cases	<input checked="" type="checkbox"/> Default	<input type="checkbox"/> Shared View	Change View
View	Default	Shared	
My Open Cases	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Closed Cases	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Open and Closed Cases	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Open Cases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

5. This will update the view for future use.

Delete a View

1. Go to the View icon and select the view to be deleted.
2. Right click on the view and select **Delete this View**.

Made a View a Default View

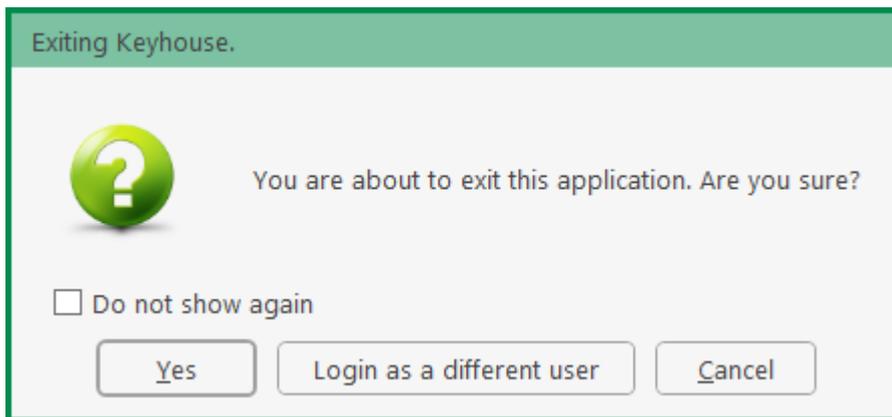
1. Go to the View icon and select the view required as a Default View.
2. Right click on the view and select **Make this your default view**.
3. This view will be the view visible each time you return to the screen.

Chapter 19 – Closing Case Management

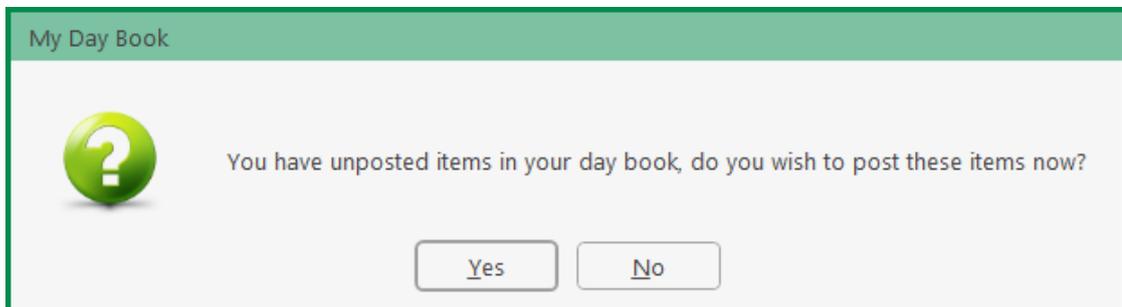
Closing Keyhouse

When closing the Case Management system the options the user gets depends on the Preferences set.

1. To close the system, click on the X in the top Right Corner of the screen.
2. The following screen will appear



3. Click Yes and the following screen will appear



4. Click on the appropriate option and the system will close.



NOTE: The Exiting Keyhouse Dialog Box will only appear if the “Show application closing prompt” is selected in the Preferences.