



# KEYHOUSE END USER MANUAL

VERSION NO: 5.4.6.1

Keyhouse, IMI Business Campus  
Sandyford Road  
Dublin 16  
Tel: 01 290 2222 [www.keyhouse.ie](http://www.keyhouse.ie)

---

## Contents

Typographical conventions .....	9
Navigating the Search Screen.....	10
Chapter 1: Getting Started .....	10
Opening Case Management .....	10
Chapter 2: Search & Open.....	12
The Search Screen .....	12
Search Lists .....	13
Search All Matters List.....	13
Search Recent Matters .....	15
How to Search Open and Closed Cases .....	15
Search Contacts .....	16
The Advanced Search .....	17
Manipulating the Search Screen .....	19
How to Sort Column Headings .....	19
How to Filter Columns .....	20
Document Search .....	20
How to open the Document Search .....	21
Chapter 3: Creating New Clients and Cases .....	22
The New Case Wizard.....	22
Create a New Case for an Existing Client.....	22
Copy Case Details .....	24
Chapter 4: The Case Diary .....	26
What is a Case Diary .....	26
Configuring the Case Diary Screen .....	27
How to Configure your Case Diary Screen .....	27
Warning Messages .....	28
How to Show or Ignore a Message.....	29
Case Diary Symbols.....	30
The Case Diary Toolbar.....	30
Navigation within the Case Diary .....	31
Case Diary Navigation Panel.....	32
Amending Client and Case Details.....	32
Updating Client Details.....	32
Updating Case Details.....	34

---

Inserting a Statute of Limitations Date.....	36
Case Associates .....	36
What are Case Associates?.....	37
Adding a Case Associate .....	37
Adding an Associate to Other Types .....	38
Maintaining unwanted Case Associates.....	39
Retire a Case Associate.....	40
Merge Case Associates .....	40
Delete a Case Associate.....	41
How to add an existing case associate to a case.....	42
How to add a New Case Associate to a Case.....	43
How to amend a Case Associates Details .....	45
How to Remove a Case Associate from a Case .....	46
How to add a Contact to a Case Associate .....	46
Print Options .....	47
Generating Tasks .....	47
How to Generate a Task .....	48
To Complete A Task.....	48
Working with Tasks in the Case Diary .....	49
How to Insert Tasks in the Case Diary .....	49
Changing Tasks .....	49
Open an attachment .....	51
Add an attachment to a task .....	51
Amend an attachments properties .....	51
Link to Folder .....	52
Delete an attachment.....	53
Copy and Paste an attachment .....	53
Deleting a Task .....	53
Copying a Task.....	53
Copying a Task to another matter.....	54
Moving a Task to another matter.....	54
Assigning a Task to Another Handler .....	54
Searching, Sorting and Filtering the Case Diary .....	55
How to Search the Case Diary .....	55
How to sort and filter the Case Diary Columns .....	56

---

How to filter Case Diary Columns.....	56
How to view all documents on a case .....	57
How to search for a document on a case .....	57
Processing Documents .....	58
Select Documents to be processed .....	58
Naming and classifying a Document .....	58
Adding Case Associates when generating a document.....	59
Answering UDF Questions.....	62
Generating an Email without an Attachment using the Email Template.....	62
Generating an Email with an Attachment using the Email Template .....	63
Working with Documents already processed .....	63
Marking a Task as Complete.....	64
Opening Documents Generated.....	65
Changing the Name and Class of a Generated Document .....	65
Undertakings .....	66
Viewing Undertakings .....	66
Adding and Viewing an Undertaking.....	66
How to Edit an Undertaking .....	68
How to Add a Document to an Undertaking.....	68
How to Discharge an Undertaking .....	69
Undertakings Register .....	70
Attaching Undertaking Documents using the Undertakings Register.....	71
Undertaking Reports .....	72
How to view Critical Information and Print Reports .....	75
Other Case Diary Functions .....	76
Chapter 5: Using the Document Manager .....	77
Document Manager .....	77
Getting around Document Manager .....	77
How to search the Document Manager .....	78
How to Sort by Column Heading .....	78
How to Filter Columns.....	79
How to Group by Column.....	79
How to reclassify Documents.....	80
How to change the Document Properties.....	80
How to email Document(s).....	81



---

Document Folders .....	81
Moving, Linking & Copying Documents in the Folder Structure .....	82
Chapter 6: The Task Manager.....	84
Navigating the Task List.....	84
The Task Screen.....	84
The Home Tab in Task Manager .....	85
Task Views .....	85
Using Different Layouts/Views .....	86
How to Show/Hide the Preview Pane .....	86
Searching, Sorting, Filtering and Grouping Tasks.....	87
How to Search the Task list .....	87
How to Sort Column Headings in the Task Manager.....	87
How to Filter the Task Manager .....	87
How to Group by a column heading in the Task Manager.....	88
Working with Tasks .....	89
Accessing a Case Diary from the Task List .....	89
How to Generate Documents.....	89
How to View the Documents of a Task .....	89
How to play a dictation .....	89
How to Mark a Single task as Complete.....	89
How to Tag Several Tasks and Mark as Complete.....	89
How to Alarm an Action/Case .....	90
View Other Users' Tasks .....	90
How to Push a Task .....	91
How to Create a Outlook Task.....	91
How to Tag All Tasks.....	91
How to Add a New Item .....	91
How to Edit a Task.....	93
How to Delete Tasks.....	93
Assigning Tasks.....	94
How to Recognise Assigned Tasks.....	94
How to View the Assignment History of a Task .....	94
How to Assign a Task to another Handler .....	94
How to take a Task .....	95
Task List Options.....	95

Print your task list.....	95
How to Export a copy of your task list.....	97
Chapter 7: Know Your Client .....	98
Know Your Client .....	98
General Tab .....	98
Anti-Money Laundering.....	99
Adding Existing Documents to AML Screen .....	101
Client Records.....	102
Other Details.....	103
Client Contacts .....	103
Chapter 8: Keyhouse Capture.....	104
How to Capture a Folder .....	104
How to Capture a File .....	107
Chapter 9: The Template Library.....	110
How to Search for precedent documents .....	110
How to sort Column Headings in the Template Library .....	110
How to apply a filter .....	111
Chapter 10: Conflict Search .....	112
What is a Conflict Search? .....	112
How to do a Conflict Search .....	112
Chapter 11: The Strong Room .....	115
What is the Strong Room used for? .....	115
How to Search for an Item .....	115
How to Add a File/Item to the Strong Room.....	116
Entering Deeds in the Strong Room .....	117
Entering Wills in the Strong Room .....	118
Attach a Document to a Strong Room Entry .....	118
How to Withdraw an Item.....	120
How to Replace/Return an Item.....	121
Delete a file .....	121
How to view the History on a file/item .....	121
Working with Documents Only .....	122
Add a file without using a Case .....	122
Chapter 12: Time Recording .....	124
Time Recording in the Case Diary.....	124

---

How to Record Time Using the Timer .....	125
How to Post Time from the Timer .....	126
How to Record and Post Admin Time Using the Timer .....	127
How to create an Empty Timer .....	128
How to create a manual time slip .....	129
How to create an Admin Time slip .....	130
How to View the Day Book from the Timer .....	131
My Day Book.....	131
Viewing the Day Book.....	131
How create a Time slip in the Day Book.....	131
How to create an Admin Time slip in the Day Book .....	132
How to amend a Time Slip.....	132
How to Delete a Time Slip .....	132
How to Post the Day Book.....	132
Accessing the Time Ledger Screen .....	133
Viewing the time Ledger .....	133
How to Create a Draft Invoice from the Time Ledger Screen .....	133
Create a Billing Guide Report .....	140
The Time Report .....	142
My WIP by Bill Date .....	142
My Top WIP .....	143
KPI Reports .....	144
Chapter 13: Accounts .....	145
Account Functions in the Case Diary .....	145
View the Matter Ledger .....	145
Run a Report on client balances.....	145
How to set a reserve amount.....	146
How to add a comment.....	146
How to Create a Cheque Request .....	147
How to Create a Draft Invoice .....	148
My Draft Invoices .....	149
How to View My Invoices .....	149
How to Add a Draft Invoice .....	149
How to Edit a Draft Invoice .....	149
How to Delete a Draft Bill.....	149

---

How to Release a Draft Bill to Accounts.....	150
How to Print a Draft Bill.....	150
Credit Notes.....	150
My Cheques.....	151
How to Create a Cheque Request .....	151
How to View My Cheques .....	152
How to Edit a Cheque Request.....	152
How to Delete a Cheque Request .....	152
How to Release a Cheque Request.....	152
How to view the A/C Ledger.....	153
Chapter 14: The Debt Ledger .....	154
How to View the Debt Ledger .....	154
How to add the original debt .....	154
How to Post a Payment .....	154
How to Post Interest.....	156
How to Post Recoverable Costs.....	157
How to Amend an Entry .....	158
How to Print a Debt Ledger Report .....	158
Chapter 15: The Reserve Ledger .....	159
How to View the Reserve Ledger .....	159
How to Add an Entry .....	159
How to Edit an Entry.....	160
How to Delete an Entry .....	160
How to Print the Reserve Ledger .....	160
Chapter 16: Phone Log .....	161
Viewing, Searching and Sorting the Phone Log.....	161
How to view the Phone Log.....	161
Search the Phone Log .....	161
How to Sort the Phone Log .....	161
How to Filter the Phone Log.....	162
How to Group column headings in the Phone Log.....	162
How to add a phone message .....	163
How to edit a phone message .....	164
How to delete a phone message .....	165
Chapter 17: Closed Cases .....	166

How to Search for Closed Cases .....	166
How to view the Archived Diary & Ledger of a closed case .....	166
How to reopen a closed case .....	166
How to close a Case.....	167
Chapter 18: The Brief Wizard .....	169
Important Steps for preparing your Brief.....	169
Assembling a Brief .....	169
Brief Home tab .....	172
Brief Sections.....	173
How to Add a Section .....	173
How to amend a Section Name.....	173
How to delete a Section .....	174
How to change the order of Sections.....	174
How to Move a document to a different section.....	174
How to flag as a Cover or Main .....	175
Brief Options.....	175
Save current Brief as Template .....	175
How to Open a Brief .....	176
Generate the Brief.....	178
How to (Re) Generate a Brief .....	178
Chapter 18 – Personalising your Keyhouse .....	<b>Error! Bookmark not defined.</b>
Setting your Preferences .....	179
Creating User Views .....	181
Creating a View.....	181
Change a View .....	183
Delete a View .....	183
Made a View a Default View .....	183
Chapter 19 – Closing Case Management .....	184
Closing Keyhouse.....	184

## 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 <b>All Matters</b> to list all matters.
 My Matters	Click on <b>My Matters</b> to list all your matters
 Recent Matters	Click on <b>Recent Matters</b> to list matters recently accessed.
 Contacts	Click on <b>Contacts</b> to list all your clients and matters
 Associates	 Note this is for Fee Earners only. Click on Associates to list all associates on the Database
 Advanced Search	Click on <b>Advanced Search</b> to perform a more specific search on all matters.
 My Invoices	Click on <b>My Invoices</b> to add, view or edit any draft invoices you have.
 My Cheques	Click on <b>My Cheques</b> to add, view or edit any draft invoices you have.
 Phone Log	Click on the <b>Phone Log</b> 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 <b>Strong Room</b> 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 <b>Document Search</b> to search all documents.
 Template Library	Click on <b>Template Library</b> 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 must 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.

Search/Open

All Matters

My Matters

Recent Matters

Contacts

Associates

Advanced Search

My Invoices

My Cheques

Phone Log

Firm Undertakings

Strong Room

Document Search

Template Library

Search

Code	Last Accessed	File Colour	Name	Description	Fee Earner	Fee Co...	File Ref
<div>▶</div> 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.

C.	A.	P.	D.	Date	Time	Case Code	Handler	Team	From	Client/Case/Matter	Action	Standard View
				19 Apr 2016	13:44	AAA001/0001	CN	COM	CN	AAA Securities Ltd Landlord Dispute	Undertaking Created: Date: 19 Apr 2016 Type: Financial Given Non Commercial Autho...	19 Apr 20...
				30 Mar 2016	10:21	FLY001/0001	CN	COM	CN	Jack Flynn Sale of 10 Rose Lawn, Blanchardstown, Dublin 17	Review File	30 Mar 2...
				29 Mar 2016	09:39	ABB002/0004	CN	COM	CN	Abbie Lynch RTA The Rise, Stillorgan	Value: €100.00 , Comment: 1st Payment , Date: 22/03/2016	29 Mar 2...
				29 Mar 2016	09:39	ABB001/0004	CN	COM	CN	George J Abbott EPA - Mary James and David Jones	Value: €50.00 , Comment: Last Payment , Date: 24/03/2016	29 Mar 2...
				29 Mar 2016	09:39	ABB001/0002	CN	COM	CN	George J Abbott Purchase 7 Church Street, Rathgar, Dublin 6	Value: €150.00 , Comment: 3rd Payment , Date: 22/03/2016	29 Mar 2...





## 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.

Code	Name	Description
AAA001/0001	David Abrahams	Family Law
FLY001/0001	Jack Flynn	Sale of 10 Rose Lawn, Blanchardstown, Dublin 17
AAA001/0001	AAA Securities Ltd	Landlord Dispute
ZAC001/0002	Irina Zacawski	Purchase & Planning application for Unit 6 Blackrock Shopping Centr...
ABB002/0004	Abbie Lynch	RTA The Rise, Stillorgan
BOB002/0002	Bing Oil Industries Business Banking	Advice re Agreement
ZAC001/0001	Irina Zacawski	Divorce
BLO003/0001	James Bloggs	Purchase of Wood Drive, Dublin
TOR001/0001	Auril Tobin	Sale of The Cottage, Ashbourne, Co Meath
TOR001/0002	Auril Tobin	Purchase of 1 High Street, Naas
TEG001/0001	Peter Tegg	RTA on N4 at Lucan
ZZT001/0000	Test New Client	Document matter
BLA001/0007	Gordon T. Black	Rates Collection proceedings action
ZZT001/0001	Test New Client	test
TNT001/0001	Test new	fgggg
BLA001/0001	Gordon T. Black	RTA Walkinstown Crossroads, G. Black
BLA001/0001	Dunnes Stores Blackrock	Slip & Fall on Frozen Food Aisle
BOB002/0002	Bing Oil Industries Business Banking	Advice re Shareholding Agreement - Web Designers Ltd
BLO002/0001	David Bloggs	Stephen Kaogh - Joe Bloggs

## Chapter 2: Search & Open

### The Search Screen

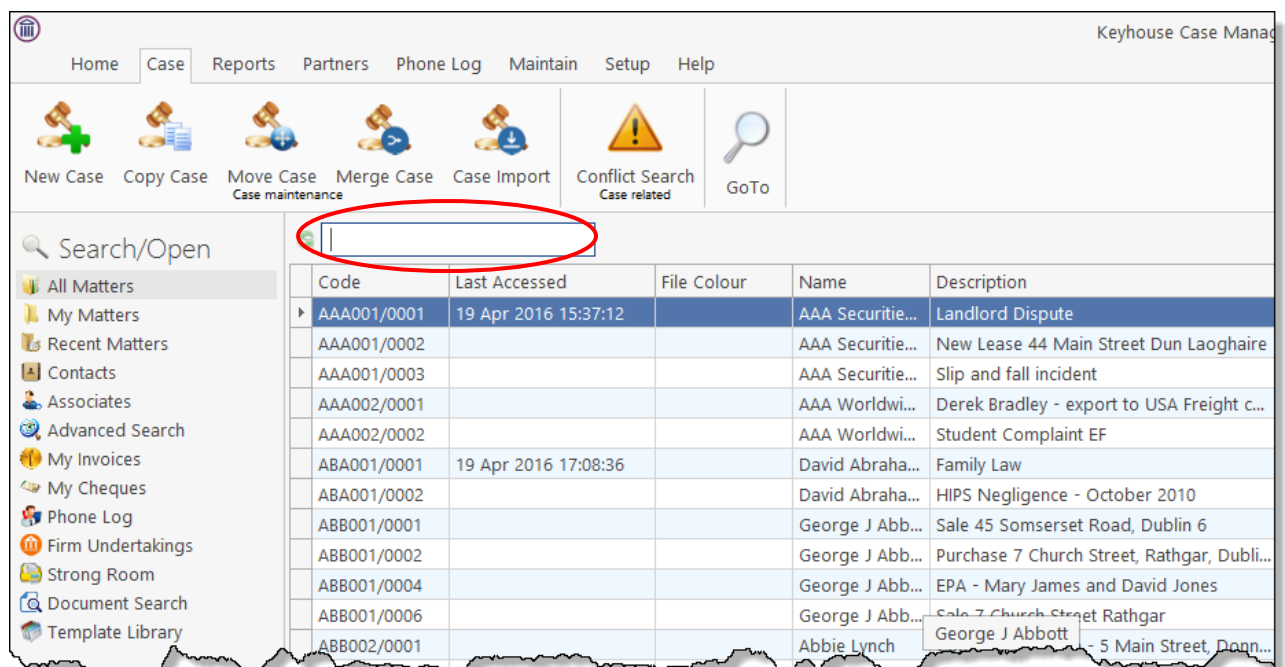
Code	Last Accessed	File Colour	Name	Description	Fee Code	Fee Earner	File	Date	Work Type	Original Closed Date
BRE001/0001	13 Aug 2015 11:31:44		Mike Breeze	Broken left leg.	MW	Martina Win...	BRE001/0001		Accident	
ZZT001/0001	11 Aug 2015 16:37:51		Test New Client	test	BS	Brian Sween...		27 Mar 2010	Commercial	
ZZT001/0001			Interim Busine...	International Business Services Ltd -> D...	BS	Brian Sween...		15 Feb 2008	Debit	Debit Collection
ZZT001/0001			Jack Flynn	Sale of House at: 4 The Meadows, Rathfarn...	CN	Carol Nolan	FLY001	02 Jul 2015	Conveyancing	Sale
ZZT001/0001			Gordon T. Bla...	RTA Walkinstown Crossroads, G. Black	BS	Brian Sween...	12347	02 Jul 2015	Conveyancing	Sale
ZZT001/0001			Jack Flynn	Document matter	SK	Stephen Ka...		02 Jul 2015	Conveyancing	Sale
ZZT001/0001			Jack Flynn	Purchase of 16 The Hayway, Terenure...	CN	Carol Nolan	FLY002/001		Conveyancing	Sale
IBS001/0020	10 Aug 2015 11:43:26		Interim Busine...	Gary Neville - Short term loan	BS	Brian Sween...			Conveyancing	Sale

-  **Tip:** Click on a column headings to sort alphabetically by that heading e.g. 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

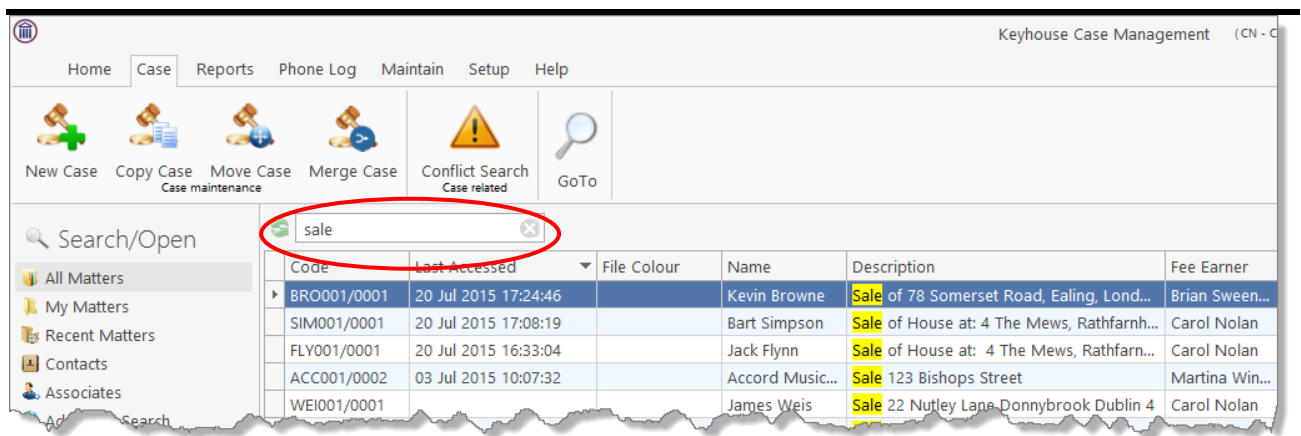
1. Click on **Search/Open** on the Navigation bar.
2. Click on **All Matters** input a key search word in the **Search Box** for e.g. part of the client name or matter description.



The screenshot shows the Keyhouse Case Management software interface. The 'Search/Open' section is highlighted with a red circle. Below it, a table of search results is displayed.

Code	Last Accessed	File Colour	Name	Description
AAA001/0001	19 Apr 2016 15:37:12		AAA Securitie...	Landlord Dispute
AAA001/0002			AAA Securitie...	New Lease 44 Main Street Dun Laoghaire
AAA001/0003			AAA Securitie...	Slip and fall incident
AAA002/0001			AAA Worldwi...	Derek Bradley - export to USA Freight c...
AAA002/0002			AAA Worldwi...	Student Complaint EF
ABA001/0001	19 Apr 2016 17:08:36		David Abraha...	Family Law
ABA001/0002			David Abraha...	HIPS Negligence - October 2010
ABB001/0001			George J Abb...	Sale 45 Somerseset Road, Dublin 6
ABB001/0002			George J Abb...	Purchase 7 Church Street, Rathgar, Dubli...
ABB001/0004			George J Abb...	EPA - Mary James and David Jones
ABB001/0006			George J Abb...	Sale 7 Church Street Rathgar
ABB002/0001			Abbie Lynch	George J Abbott - 5 Main Street, Donn...

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

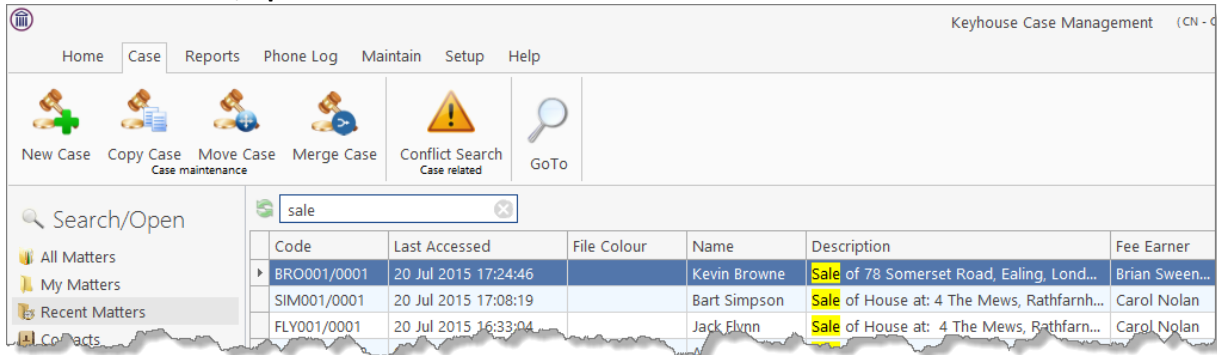


4. **Double click** the required matter to access the case diary for this matter.

## Search Recent Matters

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

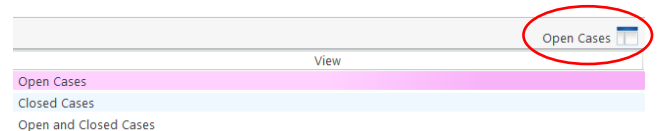
1. Click on **Search/Open**.



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 e.g. "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.

Keyhouse Case Management (CN - Carol Nolan - 0000 / 0000)

Home Case Reports Phone Log Maintain Setup Help

New Case Copy Case Move Case Merge Case Conflict Search Case related GoTo

Search/Open

My Contact

Search

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@AAAworlwide removals.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.lynn@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 Donnybrook	6677889	andrew@ain.ie	BS

Matters (AAA001)

Search

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
AAA001/0003		File and F...	Nolan	Legal	General	15 Feb 2015	AAA001	AAA Securitie...				

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".

My Contact

Search

accord

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

Matters (ACC001)

Search

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
ACC001/0001		Purchase New office Premises	Wint...	Commercial	Purchase	14 Jul 2010	ACC001	Accord Music...				



**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.

Time	Code	Name	File Colour	Client Address	Description	F/e	Team	Dept	File Ref	Old Ref	User
ABA001/0001		David Abrahams		123 Mayfair Street Dublin 2	Family Law	AM	CON	FAM			
ABA001/0002		David Abrahams		123 Mayfair Street Dublin 2	HPS Negligence - October 2010	BS	COM	LIT			

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

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.

### “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.

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.

Search: Ellis%Rathmines

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 Earning:  And Dept:

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.

Keyhouse Case Management (CN - Carol Nolan - 0000 / 0000)

Home Case Reports Phone Log Maintain Setup Help

New Case Copy Case Move Case Merge Case Case Import Conflict Search Case View GoTo

Search/Open Handler: Carol Nolan

Code	Last Accessed	Name	Phone No.	Description	Fee Earning	Started	Department	Work Type	Original Closed Date
BLA001/0003	04 May 2016 10:08:55	Asa Secante	012312112	Slip and fall 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	
BLO001/0005	27 Apr 2016 15:35:54	Angela Beck	01-2339999	Sale of 3 Main Street, Bray.	Carol Nolan	02 Jun 2007	Conveyancing	Sale	
BLO001/0003		Joe Bloggs	01-6767981	Advice File	Carol Nolan	10 Sep 2005	Litigation	Advice	
BOU001/0001		David Bloggs	021-4577777	Sale 45 Hills Road, Tipperary	Carol Nolan	02 Oct 2010	Conveyancing	Sale	
CUL001/0001		Claire Bourke	01 2040020	Personal Injury at work	Carol Nolan	14 Jan 2011	Litigation	Advice	
DEA001/0003		Ann Marie Cul...	01 6777777	Credit Card Debit	Carol Nolan	14 Jan 2011	Debit	Debt Collection	
DUG001/0002		James Deane	01 6777777	Purchase 3 Burlington Terrace, Bray	Carol Nolan	03 Apr 2005	Conveyancing	Purchase	
FLY001/0001		Paul Duggan	064 78901	Separation Arrangement	Carol Nolan	20 Aug 2010	Family Law	Separation A...	
HAR001/0001	27 Apr 2016 15:36:03	Jack Flynn	01-564 7894	Road Traffic Accident at Junction 9 on M...	Carol Nolan	08 Mar 2016	Litigation	Accident	
		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.

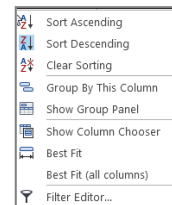
### How to Sort Column Headings

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 Earning
▶	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.

The screenshot shows the Keyhouse Case Management interface. At the top, there's a navigation bar with tabs: Home, Case, Reports, Phone Log, Maintain, Setup, Help. Below this is a toolbar with icons for New Case, Copy Case, Move Case, Merge Case, Case Import, Conflict Search, and GoTo. The main area is divided into a left sidebar with a 'Search/Open' section containing links like All Matters, My Matters, Recent Matters, Contacts, Associates, Advanced Search, My Invoices, My Cheques, Phone Log, Firm Undertakings, Strong Room, Document Search, and Template Library. The central part of the screen displays a table with columns: Code, Last Accessed, Name, Phone No., Description, Fee Earning, Started, Department, and Work Type. A filter dropdown menu is open over the 'Fee Earning' column, showing a search bar and a list of handlers: ADM (Admin), AM (Anne Mellon), BS (Brian Sweeney), CN (Carol Nolan), JP (Justin Phelan), MK (Mark Kelly), MW (Martina Winters), and SK (Stephen Keogh). The 'Clear Filter (All Handlers)' option is visible at the top of the dropdown.

- 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

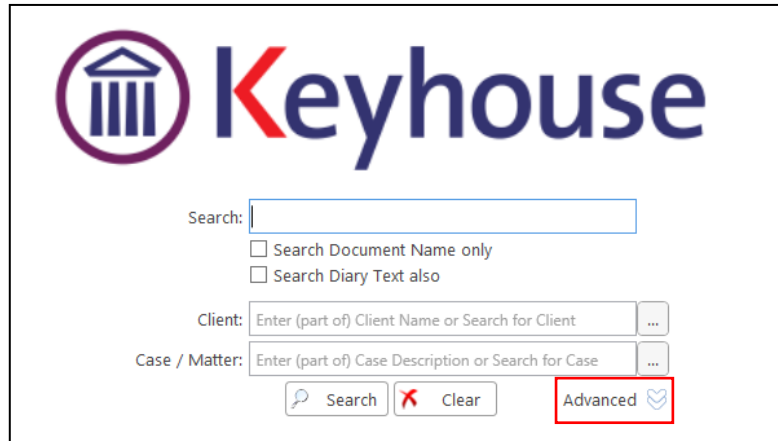
1. Click on **Search/Open**, then on **Document Search**

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.



Search:

☐ Search Document Name only  
☐ Search Diary Text also

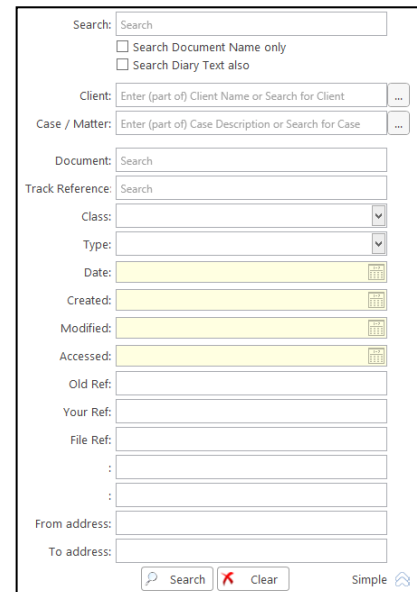
Client:  Enter (part of) Client Name or Search for Client ...

Case / Matter:  Enter (part of) Case Description or Search for Case ...

- 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



Search:

☐ Search Document Name only  
☐ Search Diary Text also

Client:  Enter (part of) Client Name or Search for Client ...

Case / Matter:  Enter (part of) Case Description or Search for Case ...

Document:

Track Reference:

Class:

Type:

Date:

Created:

Modified:

Accessed:

Old Ref:

Your Ref:

File Ref:

:

:

From address:

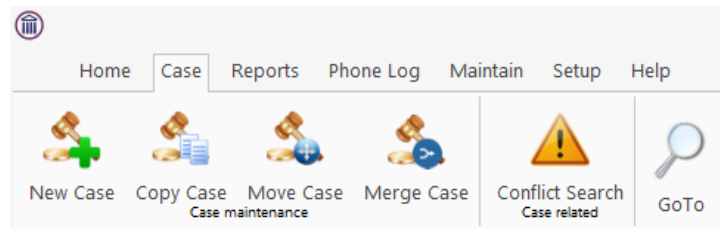
To address:

## 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.

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	Abbie Lynch	14 The Mews

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

Previous Next

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

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 series 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

**New Matter/Case Wizard** Step 2/7 Step 3/7 Step 4/7

Enter Matter Description

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

Previous Next

**New Matter/Case Wizard** Step 1/7 Step 2/7 Step 3/7 Step 4/7 Step 5/7

Ref. and Estimate Fee

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 Fixed Fee: ☐

Expected Bill Date: Enter expected date

Outlay Budget: 0.00

Previous Next

**New Matter/Case Wizard** Step 3/7 Step 4/7 Step 5/7 Step 6/7

Other Case Details

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)?		

Previous Next

**New Matter/Case Wizard** Step 4/7 Step 5/7 Step 6/7 Step 7/7

Ref. and Estimate Fee

Click finish to create new matter.

☐ Copy matter details from another matter

☐ Print client label


☐ Print matter label


Previous Finish


matter, a new wizard will start. See the next 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**.

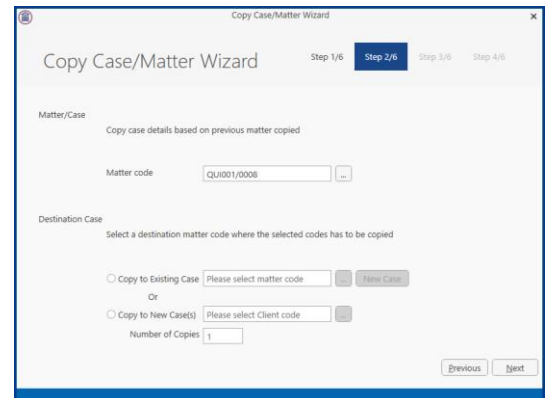
2. **Select** a source matter by clicking the  **browse** button.

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

3. **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.
4. From the Destination Case section, select the Copy to Existing Case if the information is to be added to a matter already in existence. Alternatively, select New Case if a new source matter needs to be created.
5. Select Copy to New Cases(s) if you need to create multiple new matters.
6. Select the Client using the Browse button as described above. Then enter the number of matters to be created.

 **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.

7. Click **Next** to continue to Step 3, which lists the **User Defined Fields (UDFs)** which are in use in the source matter.
8. The **UDFs** can be sorted, grouped and filtered as



Copy Case/Matter Wizard

Step 1/6 Step 2/6 Step 3/6 Step 4/6

Matter/Case

Copy case details based on previous matter copied

Matter code: QUA001/0008

Destination Case

Select a destination matter code where the selected codes has to be copied

☐ Copy to Existing Case Please select matter code

Or

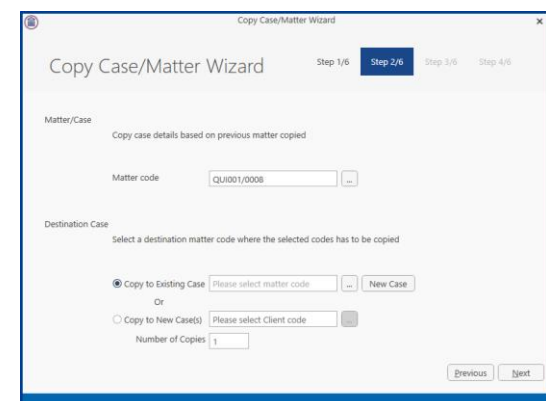
☐ Copy to New Case(s) Please select Client code

Number of Copies: 1



Advanced Matter Search

Code	Name	File Colour	Client Address	Description
AAAD01.0004	AAA Securities Ltd		44 Main Street Dun Laoghaire Co Dublin	Sale of 2 High Street, London
AB001.0007	George J Abbott		60 Somerset Road, Rathleigh, Dublin 6.	Sale of 1 Main Street, Howth, Co. Dublin
CU001.0001	Aen Marie Cullen		101 Dun Emer Drive Dundrum Dublin 14	Credit Card Debt
CU001.0001	John Deane		44 Ellis Drive Rathfarnham Dublin 6	Sale of Village Hall
AB001.0001	Abbey & Procter		14 The Mews Dublin 12	Commercial
PT002.0001	Melinda Fitzgerald		12 Eaton Brae Orwell Road Rathgar Dublin 14	Sale of lands in wicklow
BLA001.0001	Gordon T. Black		23 Ellis Park, Rathfarnham, Dublin 6.	RTA Washington Crossroads, G. Black
BLA001.0000	Gordon T. Black		23 Ellis Park, Rathfarnham, Dublin 6.	0000 Matter
AAAD01.0003	AAA Securities Ltd		44 Main Street Dun Laoghaire Co Dublin	Sale of 1 Main Street, Lough, Co. Wick
PT001.0001	Melinda Fisher		12 Eaton Brae Orwell Road Rathgar Dublin 14	Sale of lands in Wicklow
CU001.0000	James Deane		9 Northbrook Park, Rathleigh, Dublin 6	0000 Matter
CU001.0001	Bill Cleton		Main Street Bray Co Wicklow	Unfair dismissal by State Department
KU002.0002	Sarah Kelly		841 sandford Dundrum Dublin 14	Debt Collection
AB001.0001	George J Abbott		60 Somerset Road, Rathleigh, Dublin 6.	Sale 45 Somerset Road, Dublin 6
AB001.0001	David Abrahams		123 Mayfair Street Dublin 2	Family Law



Copy Case/Matter Wizard

Step 1/6 Step 2/6 Step 3/6 Step 4/6

Matter/Case

Copy case details based on previous matter copied

Matter code: QUA001/0008

Destination Case

Select a destination matter code where the selected codes has to be copied

☒ Copy to Existing Case Please select matter code

Or

☐ Copy to New Case(s) Please select Client code

Number of Copies: 1



Copy Case/Matter Wizard


Step 1/6 Step 2/6 Step 3/6

Drag a column header here to group by that column

Group	Detail	Value
<input checked="" type="checkbox"/>	"I" if single or "we" if joint ?	I
<input checked="" type="checkbox"/>	"my" if the client is single else "my"	my
<input checked="" type="checkbox"/>	Estimated Date of Closing.	15th March 2009
<input checked="" type="checkbox"/>	Folio Number ?	98659
<input checked="" type="checkbox"/>	Townland	
<input checked="" type="checkbox"/>	Which County ?	County Dublin
<input checked="" type="checkbox"/>	Date of Contract	N/A
<input checked="" type="checkbox"/>	Loan Account Number ?	1258745 AE
<input checked="" type="checkbox"/>	Balance of Sale Price ?	587,000
<input checked="" type="checkbox"/>	Agreed Valuation of Househol...	12,000
<input checked="" type="checkbox"/>	Is the property the Vendor's Fa...	Yes
<input checked="" type="checkbox"/>	Has there been any unauthoris...	No
<input checked="" type="checkbox"/>	Duration of Lease term.	N/A

required, to make it easier to find and select those which are to be copied to the destination matter.

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


 If you right click over the check boxes, the option to Tag All or Untag All is available.

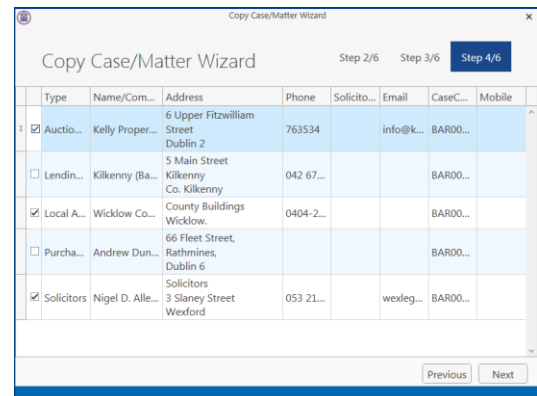
10. Click **Next** to continue to Step 4.

11. In Step 4, the **Case Associates** in the source matter are listed.

12. Again, you may filter or sort the Case Associates to make it easier to select those to be copied.

13. Check the corresponding boxes to select the Case Associates you wish to copy to the destination case.


 If you right click over the check boxes, the option to Tag All or Untag All is available.

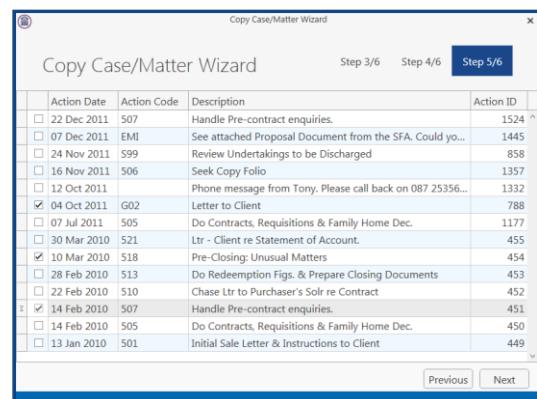


Type	Name/Com...	Address	Phone	Solicito...	Email	CaseC...	Mobile
<input checked="" type="checkbox"/>	Auctio...	Kelly Proper...	6 Upper Fitzwilliam Street Dublin 2	763534	info@k...	BAR00...	
<input type="checkbox"/>	Lendin...	Kilkenny (Ba...	5 Main Street Kilkenny Co. Kilkenny	042 67...		BAR00...	
<input 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...	3 Slaney Street Wexford	053 21...	wexleg...	BAR00...	

14. Click **Next** to continue to Step 5, which lists the actions in the source matter.

15. 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.




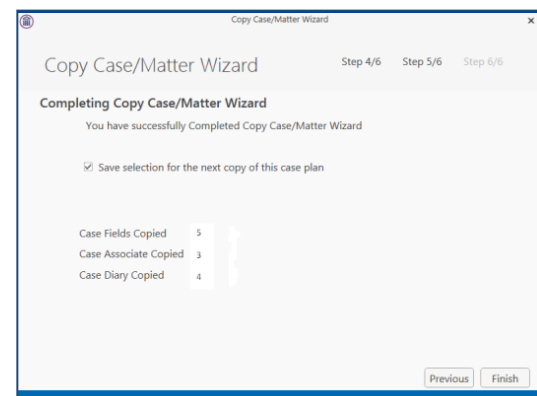
Action Date	Action Code	Description	Action ID
<input type="checkbox"/>	22 Dec 2011	507 Handle Pre-contract enquiries.	1524
<input type="checkbox"/>	07 Dec 2011	EMI See attached Proposal Document from the SFA. Could yo...	1445
<input type="checkbox"/>	24 Nov 2011	599 Review Undertakings to be Discharged	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

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

17. 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 copies. The final screen also provides a summary of the numbers of items copied.

18. Click **Finish** to close the wizard. The copied details are now included in the destination case.

 The matter description will need to be changed on each matter.



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' application in 'Standard View'. The main window shows a case diary for Case ABA001/0001, handled by David Abrahams. The table lists various tasks with columns for Date, Time, Handler, and Synopsis. Tasks are marked with status icons (green for completed, yellow for pending, red for overdue). Annotations highlight key features:

- Case Diary showing 1) Task completed 2) Future Tasks:** Points to the main task list table.
- Documents Generated:** Points to the 'Attachments' section at the bottom of the task list.
- Document Preview:** Points to the right-hand pane showing details for a selected document, including client information and document metadata.

## 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 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 you 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.

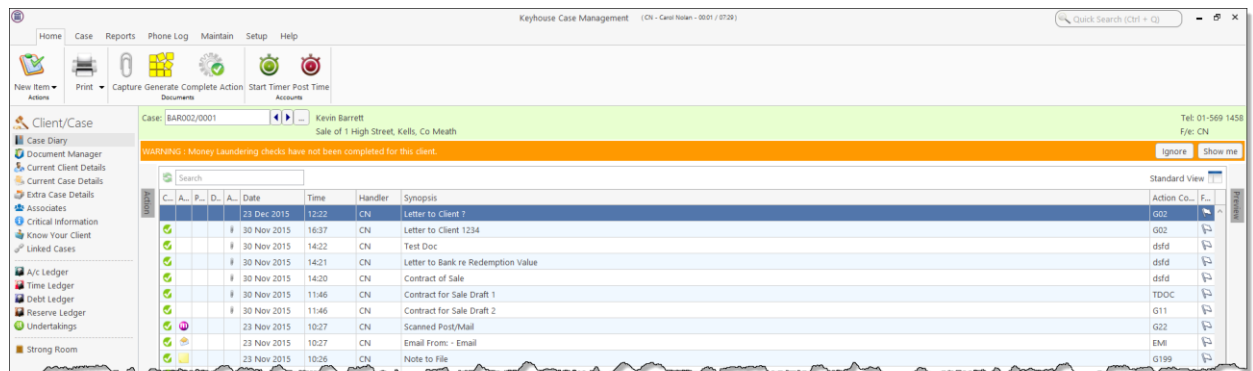




### Sample 3: Case Diary with Floating Case Plan



#### How to create this view:

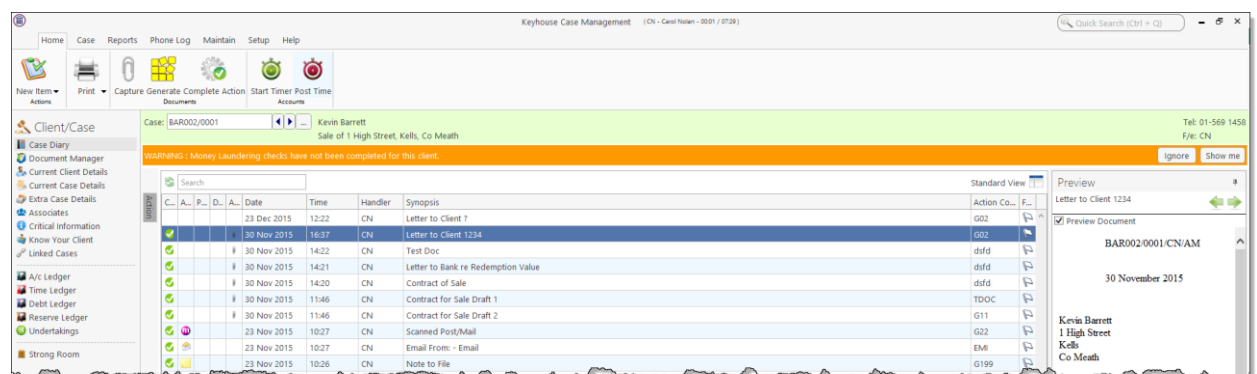
1. Move your mouse over **Action** to the located to left of the Case Diary Screen the Case Plan will appear.




### 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.



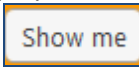
**Caution:** Please read any warnings specific to the file as they could be vital information specific to this case.

## How to Show or Ignore a Message


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


Case: AAA001/0001	AAA Securities Ltd Landlord Dispute	Tel: 0121121112 F/e: MW
WARNING : Invoices outstanding over 2 Years 9 Months .		Ignore Show me
WARNING : No activity on this file in over 33 months.		Ignore Show me
WARNING: Only speak to John Dunne with calling this client.		Ignore Show me

 **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.

Case: AAA001/0001	AAA Securities Ltd Landlord Dispute																																				
Only speak to John Dunne with calling this client.																																					
<input checked="" type="checkbox"/> Show Alert																																					
<table border="1"> <thead> <tr> <th colspan="2">Account Summary</th> </tr> </thead> <tbody> <tr> <td>Debtors A/c</td> <td>7,396.75</td> </tr> <tr> <td>Outlay A/c</td> <td>94.63</td> </tr> <tr> <td>Outlay Budget</td> <td>0.00</td> </tr> <tr> <td>Current Outstanding Fees</td> <td>6025.00</td> </tr> <tr> <td>Client A/c</td> <td>0.00</td> </tr> <tr> <td>Client Current</td> <td>0.00</td> </tr> <tr> <td>Client Deposit</td> <td>0.00</td> </tr> <tr> <td>Current Locked up value</td> <td>7,491.38</td> </tr> <tr> <td>Total Work In Progress</td> <td>0.00</td> </tr> <tr> <td>Write off time</td> <td>0.00</td> </tr> <tr> <td>Fees issued to date</td> <td>6025.00</td> </tr> <tr> <td>Fees To Date + WIP</td> <td>6,025.00</td> </tr> <tr> <td>Estimate Fees</td> <td>0.00</td> </tr> <tr> <td>Draft Invoices</td> <td>0.00</td> </tr> <tr> <td>Last Bill Date</td> <td>01 Feb 2012</td> </tr> <tr> <td>Expected Bill Date</td> <td></td> </tr> <tr> <td>Possible value to the client</td> <td>0.00</td> </tr> </tbody> </table>		Account Summary		Debtors A/c	7,396.75	Outlay A/c	94.63	Outlay Budget	0.00	Current Outstanding Fees	6025.00	Client A/c	0.00	Client Current	0.00	Client Deposit	0.00	Current Locked up value	7,491.38	Total Work In Progress	0.00	Write off time	0.00	Fees issued to date	6025.00	Fees To Date + WIP	6,025.00	Estimate Fees	0.00	Draft Invoices	0.00	Last Bill Date	01 Feb 2012	Expected Bill Date		Possible value to the client	0.00
Account Summary																																					
Debtors A/c	7,396.75																																				
Outlay A/c	94.63																																				
Outlay Budget	0.00																																				
Current Outstanding Fees	6025.00																																				
Client A/c	0.00																																				
Client Current	0.00																																				
Client Deposit	0.00																																				
Current Locked up value	7,491.38																																				
Total Work In Progress	0.00																																				
Write off time	0.00																																				
Fees issued to date	6025.00																																				
Fees To Date + WIP	6,025.00																																				
Estimate Fees	0.00																																				
Draft Invoices	0.00																																				
Last Bill Date	01 Feb 2012																																				
Expected Bill Date																																					
Possible value to the client	0.00																																				
<table border="1"> <thead> <tr> <th colspan="2">Work in Progress</th> </tr> </thead> <tbody> <tr> <td>Martina Winters</td> <td>8:20</td> </tr> <tr> <td></td> <td>0:00</td> </tr> </tbody> </table>		Work in Progress		Martina Winters	8:20		0:00																														
Work in Progress																																					
Martina Winters	8:20																																				
	0:00																																				
<table border="1"> <thead> <tr> <th colspan="2">Activity</th> </tr> </thead> <tbody> <tr> <td>Research</td> <td>1:28</td> </tr> <tr> <td>Letter Drafting</td> <td>1:10</td> </tr> <tr> <td>Attendance</td> <td>0:35</td> </tr> <tr> <td>Advice</td> <td></td> </tr> </tbody> </table>		Activity		Research	1:28	Letter Drafting	1:10	Attendance	0:35	Advice																											
Activity																																					
Research	1:28																																				
Letter Drafting	1:10																																				
Attendance	0:35																																				
Advice																																					
<table border="1"> <thead> <tr> <th colspan="2">Action Summary</th> </tr> </thead> <tbody> <tr> <td>Start Date</td> <td>06 Jun 2010</td> </tr> <tr> <td>Solicitor</td> <td>Martina Winters</td> </tr> <tr> <td>File Colour</td> <td></td> </tr> <tr> <td>Statute Date</td> <td></td> </tr> </tbody> </table>		Action Summary		Start Date	06 Jun 2010	Solicitor	Martina Winters	File Colour		Statute Date																											
Action Summary																																					
Start Date	06 Jun 2010																																				
Solicitor	Martina Winters																																				
File Colour																																					
Statute Date																																					
<table border="1"> <thead> <tr> <th>Case Status</th> <th>Who</th> <th>Date</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Last Action</td> <td>BS</td> <td>06 Feb 2012</td> <td>Review File</td> </tr> <tr> <td>Last Milestone Action</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Next Action</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Last Record Time</td> <td>MW</td> <td>01 Sep 2011</td> <td>Client Meeting re issue with planning</td> </tr> </tbody> </table>		Case Status	Who	Date	Description	Last Action	BS	06 Feb 2012	Review File	Last Milestone Action				Next Action				Last Record Time	MW	01 Sep 2011	Client Meeting re issue with planning																
Case Status	Who	Date	Description																																		
Last Action	BS	06 Feb 2012	Review File																																		
Last Milestone Action																																					
Next Action																																					
Last Record Time	MW	01 Sep 2011	Client Meeting re issue with planning																																		

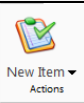














 **NOTE:** The specific warning related to the case can be added via the **Critical Information** shortcut on the navigation panel. Type in message in text box and tick **show alert**.


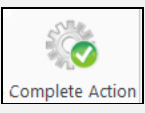
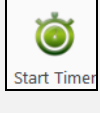
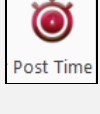

4. Click on the **Ignore** button  to ignore the message and remove it from the case.

## 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

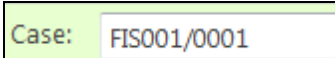



## The Case Diary Toolbar

	New	Click on the New to add any of these tasks.	<div>  Action         </div> <div>  Note         </div> <div>  Email         </div> <div>  Appointment         </div> <div>  Phone Message         </div> <div>  Dictation         </div> <div>  Draft Invoice         </div> <div>  Request Cheque         </div> <div>  Conflict Search         </div>
	Printer	Click to print any of the following reports:	<div>  Activity Report         </div> <div>  Case Summary Report         </div> <div>  Matter Label ▶         </div> <div>  Client Label ▶         </div>
















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.
 Dictation	Dictations	Click to dictate to a matter – Note: This only works with KeyDict and must be activated by the System Administrator.

## Navigation within the Case Diary

Case: FIS001/0001	Melinda Fisher Sale of Lands in Wicklow	Tel: 012902222 F/e: CN
-------------------	--	---------------------------

	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. Right click on a field to export list to another programme.
 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 specifically for 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**  **Current Client Details** located on the **Navigation** panel the following window will appear.

**Input** the following information as required:

#### General

**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"**.

#### Client Contacts

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.

#### Notes

Click on the **Notes Tab** to enter notes relating to the client.

#### Matters

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.

#### Cross Reference

Click on **Cross Ref tab** to cross reference the client with another for example a husband and wife.

#### Categories

Click on **Categories tab** to add the client to a category.

#### Corporate

Click on **Corporate tab** to add the company details e.g. Company Registration Number.

#### Personal

Click on the **Personal tab** to add the client's personal details for e.g. Date of Birth, Date of Marriage etc.

#### Legal Details

Click on the **Legal Details tab** to add the legal details about the client. E.g. Legal Name.

#### Permission

Click on the **Permission tab** to control access at a client level


#### Billing Details

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

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**  **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

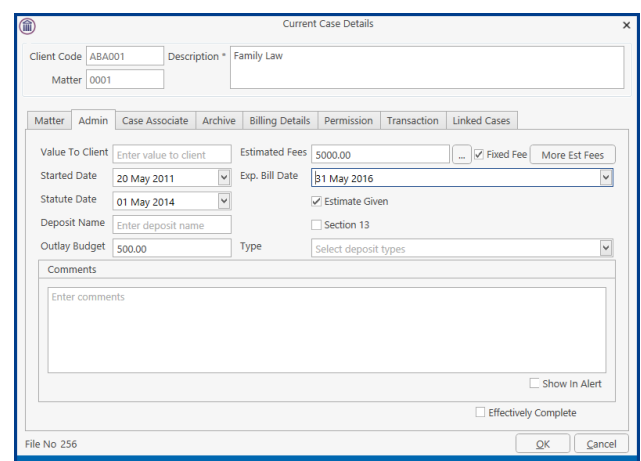
Check the box if an estimate of fees has been given.

### More Est Fees

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

	<p><b>Comments</b> Input any comments and click Show in Alert if it is to be made visible for all users.</p> <p><b>Effectively complete:</b> Tick if the case is effectively complete but should not be closed at this time.</p>
<b>Case Associate</b>	<p>Click on the <b>Case Associate tab</b> to add, view, edit or delete Case Associates.</p> <p><b>Input</b> (if applicable) alternative client details such as client name, salutation, address and click on the <b>Set Override</b> button to apply it to future documents generated.</p>
<b>Other Details</b>	<p>Click on the <b>Other Details tab</b> to view a list of user variables e.g. Purchase price, secretary reference etc. either already added to the case or due to be added.</p> <p> <b>Tip:</b> To amend the user variables click on <b>Extra Case Details</b> on the Navigation panel.</p> <p> <b>Note</b> these variables are individual to each case plan type and case.</p>
<b>Archive</b>	Remove the <b>tick</b> to reopen a previous archived file.
<b>Billing Details</b>	<p>Click on the <b>Billing Details tab</b> to add information on the billing of this matter.</p> <p>For Debt cases input the charge arrangements, the debt amount collected, and the total debt amount collected.</p> <p>Using the option buttons, select the billing type and default billing method. Use the Charge Rate Level option to set the charge rates.</p> <p>Matter Charge Out Rate will all allow for different charging rates for different Fee Earners who may work on the Matter.</p>
<b>Permissions</b>	Click on the <b>Permissions tab</b> to control access to this matter, for example to add or remove particular user groups.
<b>Transaction</b>	<p>Click on <b>Defendant</b> or <b>Client</b> tab.</p> <p>Then click on the <b>Post Button</b> to add a transaction.</p> <p>Click on the <b>Change Button</b> to amend an existing transaction.</p> <p> <b>Note</b> the balance will automatically update.</p>

- 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.

Case: AAA001/0001

AAA Securities Ltd

Landlord Dispute

Tel: 012112112

F/e: MW

WARNING : Invoices outstanding over 3 Years 9 Months 2 Days

Ignore

Show me

WARNING : No activity on this file in over 21 months.

Ignore

Show me

Search

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	

Standard View

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

31

32

33

34

35

36

37

38

39

40

41

42

43

44

45

46

47

48

49

50

51

52

53

54

55

56

57

58

59

60

61

62

63

64

65

66

67

68

69

70

71

72

73

74

75

76

77

78

79

80

81

82

83

84

85

86

87

88

89

90

91

92

93

94

95


96

97

98

99

100

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

Case:

◀▶⋮

Jack Flynn

Road Traffic Accident at Junction 9 on M50

🔍

Search

Action

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

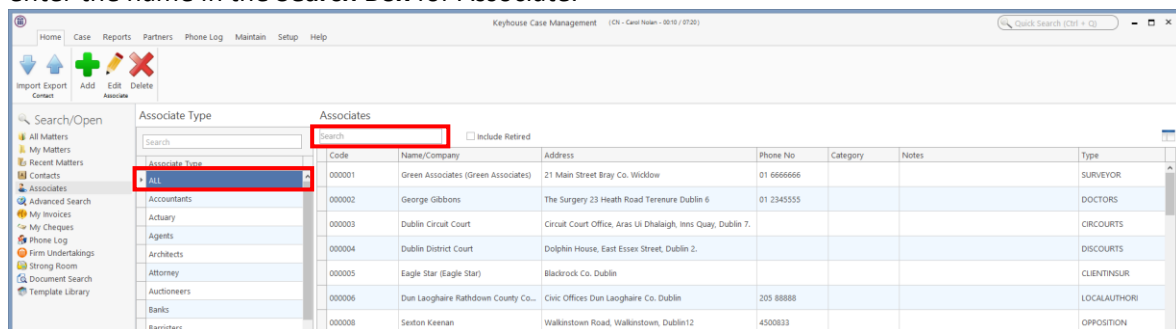
## Case Associates

### 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 i.e. 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

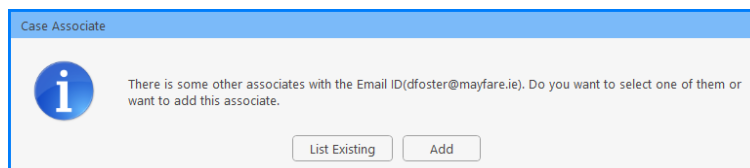
**Home:** Input home phone number

- 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.

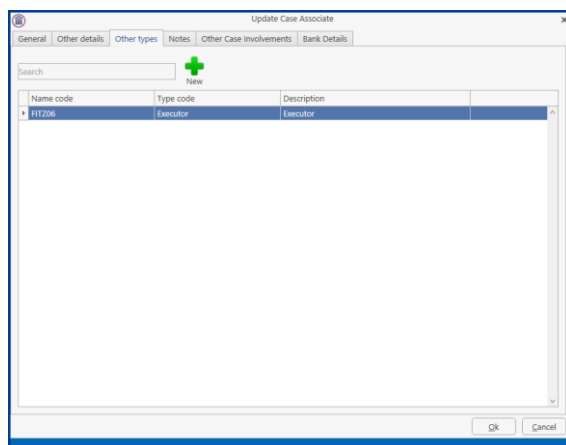


Click List existing to see the existing associate.

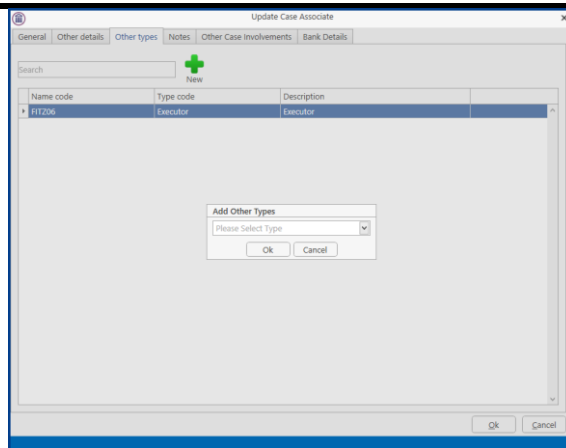
## Adding an Associate to Other Types

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.

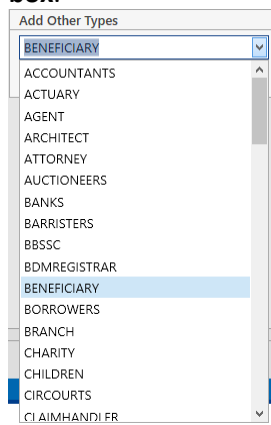
1. Open the existing **Associate** and select **Other type**.



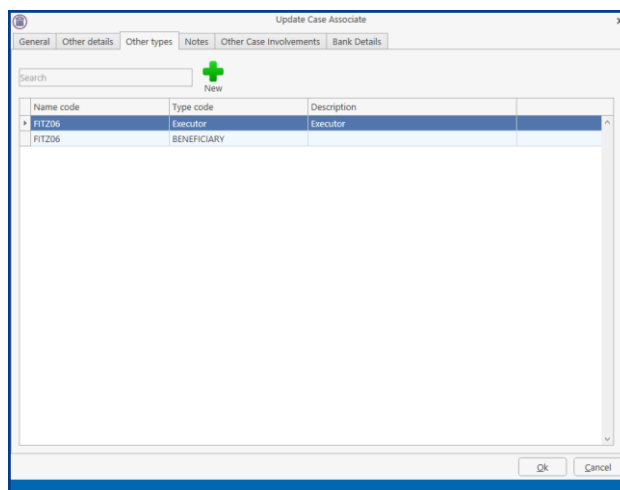
2. Click on the **New** Button and the following screen will appear.



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



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



5. 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.

Update Case Associate

General Other details Other types Notes Other Case Involvements Bank Details

### Details

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
		<input type="checkbox"/> Retired	

Search

Relationship	Name	Phone	Email	Address

New Edit Delete

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.

Home

Case

Reports

Partners

Phone Log

Maintain

Setup

Help

Keyhouse Case Management

(CH - Case House - 08/10/2020)

Quick Search (Ctrl + Q)

Import

Export

+

+

+

+

+

+

+

+

Contact

Assoc

Assoc

Assoc

Assoc

Search/Open

All Matters

My Matters

Recent Matters

Contacts

Associates

Advanced Search

My Invoices

My Cheques

Phone Log

Firm Undertakings

Strong Room

Document Search

Template Library

Associate Type

garda

Associate Type

garda

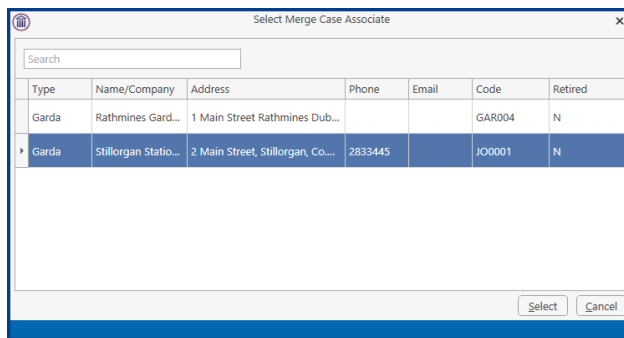
Associates

Search

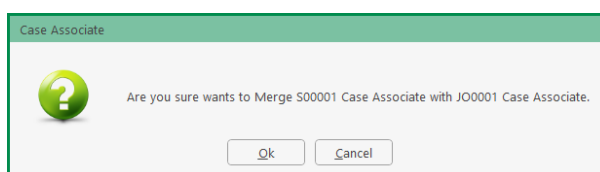
Include Retired

Code	Name/Company	Address	Phone No	Category	Notes	Type
J00001	Stillorgan Station (Stillorgan Garda S...	2 Main Street, Stillorgan, Co. Dublin	2833445			GARDA
S00001	Stepaside Garda Station (Rathmines...	2 Main Street Stepaside Co Dublin	4967777			GARDA

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



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

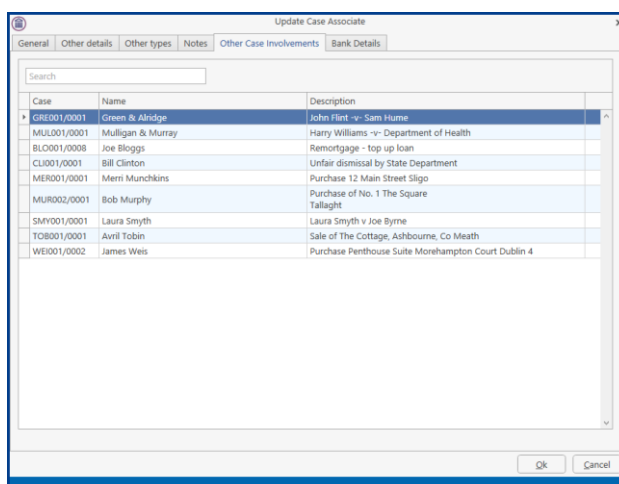


4. All matters have now been linked to the merged case associate.

## 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:

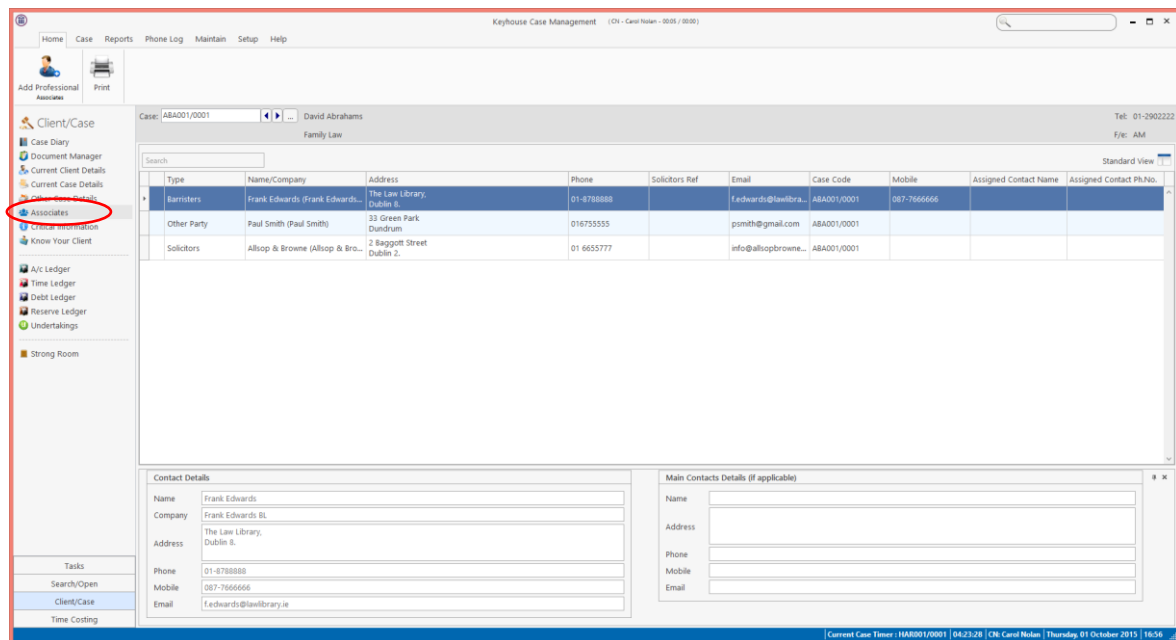
1. Open the **Associate** concerned and click on the **Other Case Involvements** Tab.




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

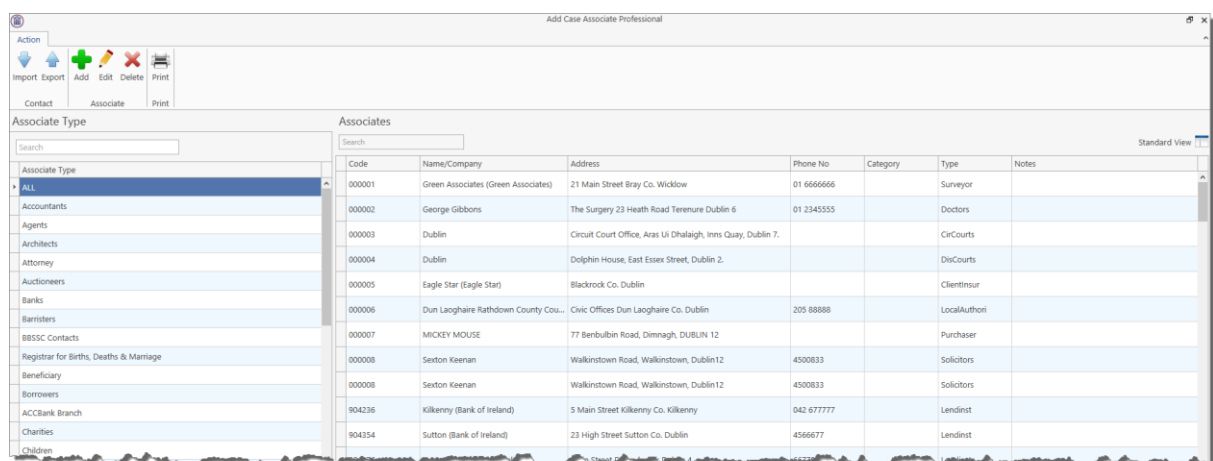
## How to add an existing case associate to a case

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).

**Add Case Associate Professional**

**Action**

Import Export Add Edit Delete Print

Contact Associate Print

**Associate Type**

so

**Associates**

Standard View

Code	Name/Company	Address	Phone No	Category	Type	Notes
000008	Sexton Keenan	Walkinstown Road, Walkinst...	4500833		Solicito...	
904394	E. P. Daly & Co	23/24 Lower Dorset Street D...			Solicito...	
904397	Michael Browne, (...)	James Street Westport Co...			Solicito...	
904400	Daly Lynch Crowe...	The Corn Exchange Burgh Q...			Solicito...	
904406	test1				Solicito...	
904459	Sexton Keenan (S...	Dundrom Dublin14			Solicito...	
ABE001	Abercorn (Aberco...	Solicitors 38 Pembroke Roa...			Solicito...	
ACT001	Actons (Actons)	Solicitors 22/24 Lower Mou...			Solicito...	

Add Add and Close Close

- Click in the **Search box** and **input** part of the solicitor's name; the search will be applied as you type.
- 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

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

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

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

**Add Case Associate Professional**

**Action**

Import Export Add Edit Delete Print Party Labels Print

Contact Associate Print

**Associate Type**

Search

**Associates**

Code	Name/Company	Address
000001	Green Associates (...)	21 Main Street Bray Co. Wick...
000002	George Gibbons	The Surgery 23 Heath Road T...
000003	Dublin	Circuit Court Office, Aras Ui D...
000004	...	...



## 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 i.e. 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.

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

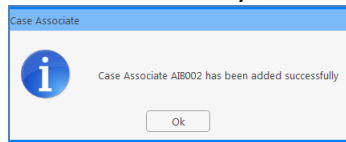
Fax number

Mobile number

Notes

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 Associates**  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

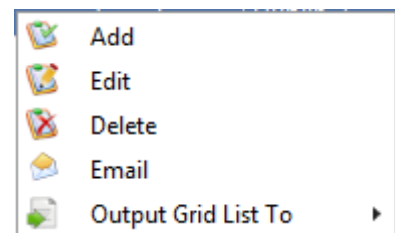
Click on the **Details tab** to add personal information such as date of birth, occupation etc.


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

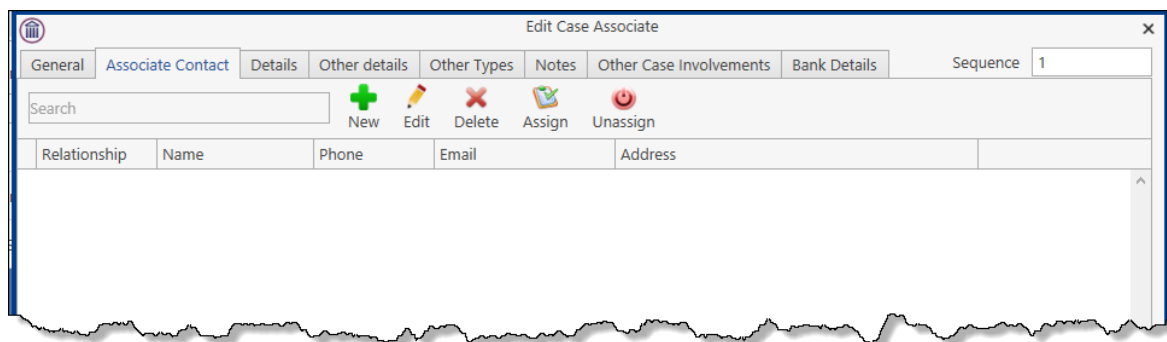
1. **Open** a case in the **Case Diary**.
2. Click on **Associates** on the **Navigation** panel.
3. Right Click on the Associate to be removed. The following menu will appear.
4. Click on the **Delete** to remove it from the case.



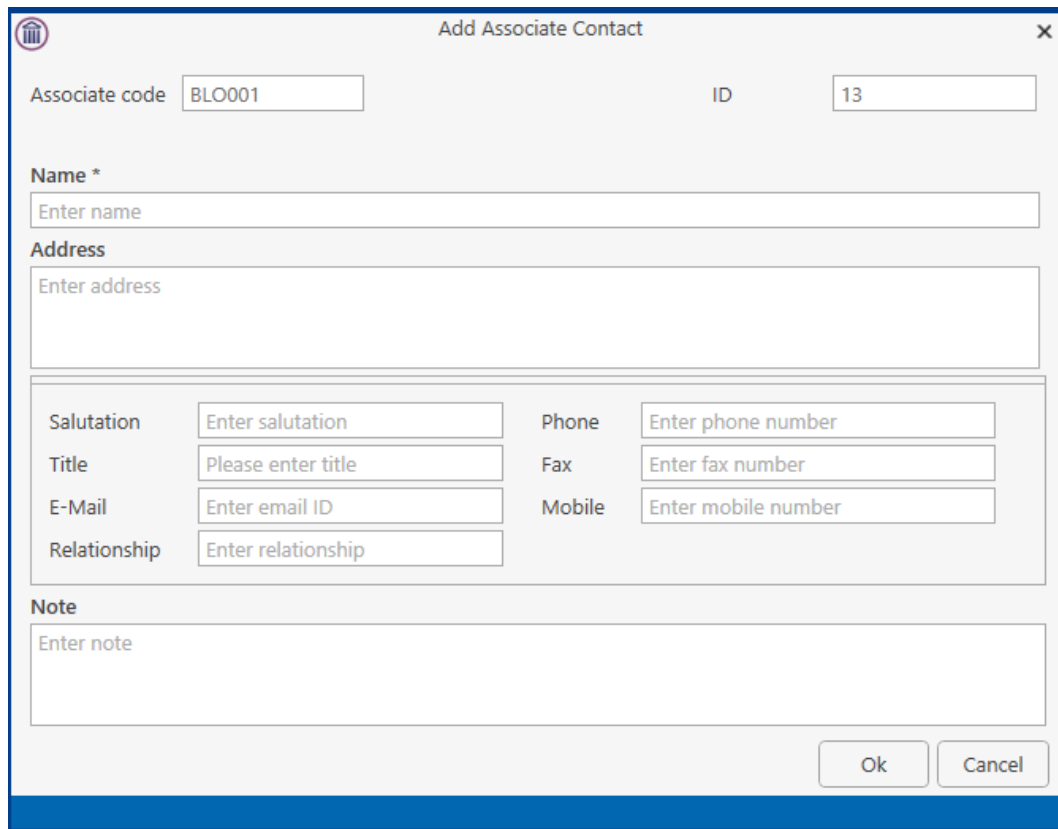
 **NOTE:** To delete a case associate completely first remove it from all cases and then delete it from the case associate database. It is not possible to delete a case associate while it is assigned to any case.


### 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 



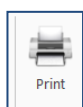
3. Enter the required information and click OK. As the address of the Associate is already in the system it is not necessary to re-enter it on this screen.



4. 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:



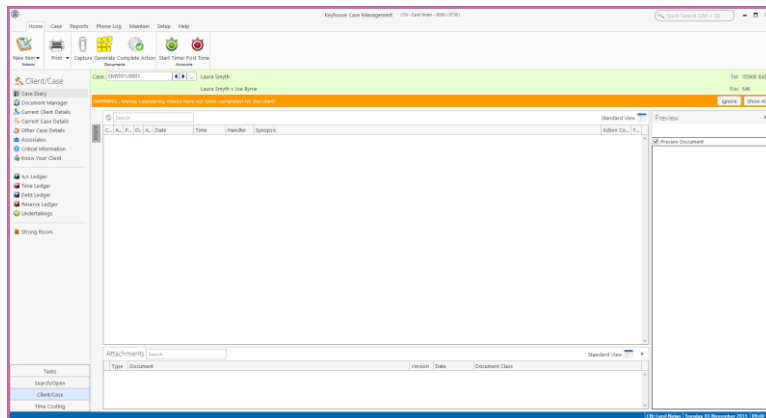
Click on **Print** to print a report of Case Associates on the Case.

## 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:

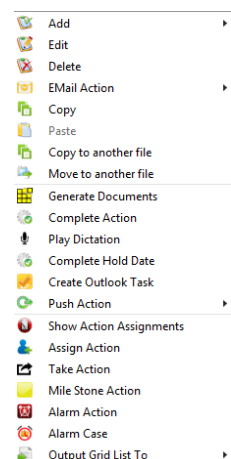
Method 1: **Double Click** the task you want to generate from the list of tasks in the case plan.

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



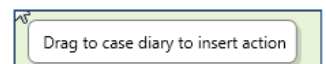
- 2) Click on **Complete Hold Date** to complete the action with the same date as it was generated.

 **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**.

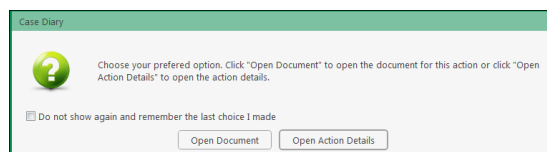


### Changing Tasks


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:

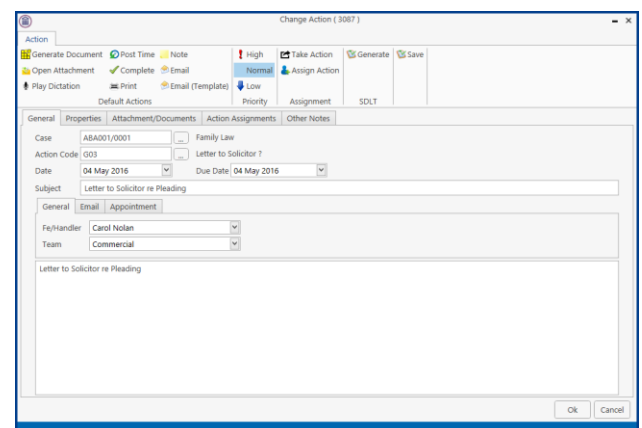
**Case:** This will default to the current case; to change click on the  button and select the required case.

**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.

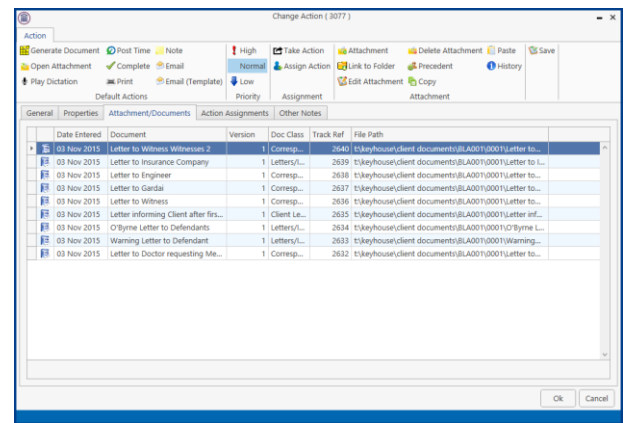
**Other Properties:** A check will appear in the relevant box if the action is a **Milestone** action, if it has been **Completed**, if it is designated as **Billable** or if the associated documents have been processed. The boxes may be checked and unchecked as required, e.g. to "uncomplete" an action, 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.

The screenshot shows the 'Change Action (3076)' dialog box with the 'Properties' tab selected. The 'Action Status' is set to 'NA'. The 'Flag' section has a 'Clear flag' button. The 'Publish' section has radio buttons for 'None', 'Publish Only', 'Export Only', and 'All', with 'None' selected. The 'Priority' section has radio buttons for 'High', 'Normal', and 'Low', with 'Normal' selected. The 'Other Properties' section has checkboxes for 'Milestone', 'Complete', 'Billable', 'Documents Processed', and 'Know Your Client'. The 'Category' section has radio buttons for 'Action', 'Fixed Dated Action', 'Note', 'Appointment', 'Reminder', 'Email', 'Phone Message', 'Dictation', 'Undertaking', 'Statute Date', 'Critical Date', 'Court Date', 'Scanned Post/Mail', 'Cheque Request', 'Photo ID', and 'Non Photo ID', with 'Action' selected. The 'OK' and 'Cancel' buttons are at the bottom right.

- 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

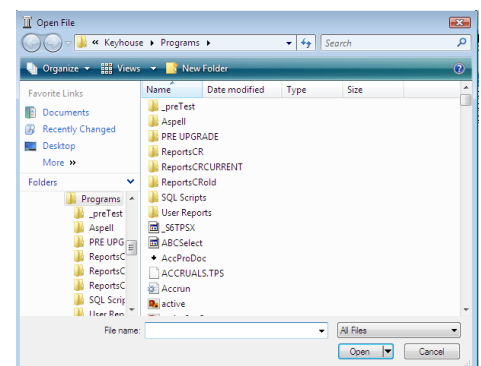
Type	Document Name	Diary Date	Version	Date	Document Class	Source
	Letter to Witness Witnesses 2	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
	Letter to Insurance Company	03 Nov 2015	1	03 Nov 2015	Letters/Interparty Corr...	Case
	Letter to Engineer	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
	Letter 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

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

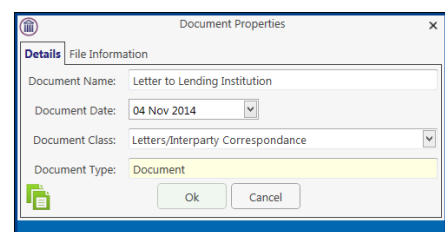
### Add an attachment to a task

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




### Amend an attachment's properties

- 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.

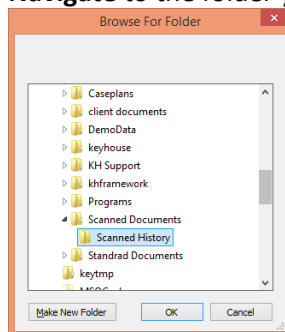
- iv. Click **OK** to save the changes.

### Link to Folder

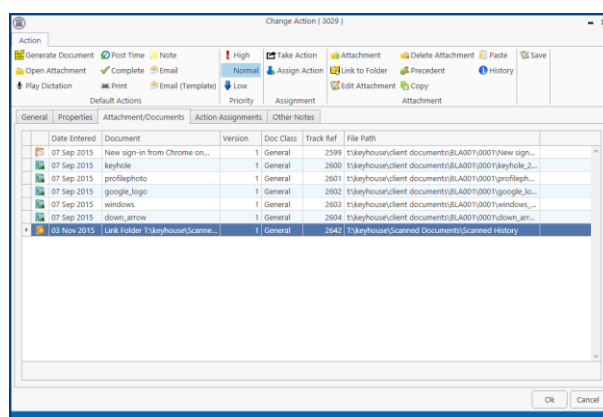
- i. Click to the **Attachment/ Documents** Tab.

- 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 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.



Document Properties

Details File Information

Document Name: Letter to Lending Institution2

Document Date: 04 Nov 2014

Document Class: Letters/Interparty Correspondence

Document Type: Document

Ok Cancel

- 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)	Completed	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	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	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.

Change Action (978)

Other Notes

Please review

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

## Deleting a Task

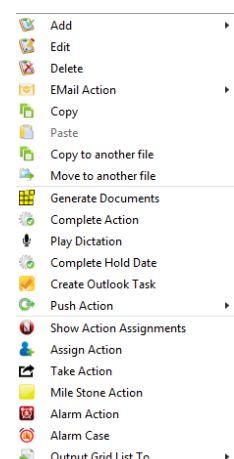
1. **Right Click** on the **task** in the **case diary** the following menu will appear.

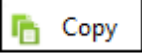
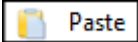
2. Click on **Delete**.




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



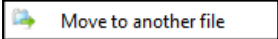
1. **Right Click** on the **task** in the **case diary**: the menu above will appear.
2. Click on **Copy**. 
3. Then **Right Click** again in the case diary: the menu above will appear.
4. Click on Paste. 


### 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.

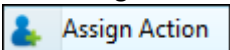
 **NOTE:** You will automatically move to the case diary of the case selected.

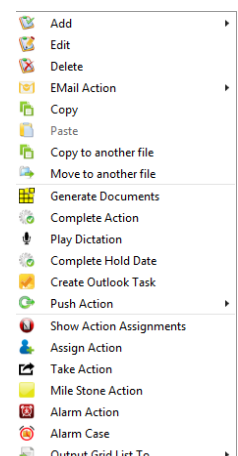


#### **TIP: TO DELETE, MOVE OR COPY MULTIPLE TASKS:**


- 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.

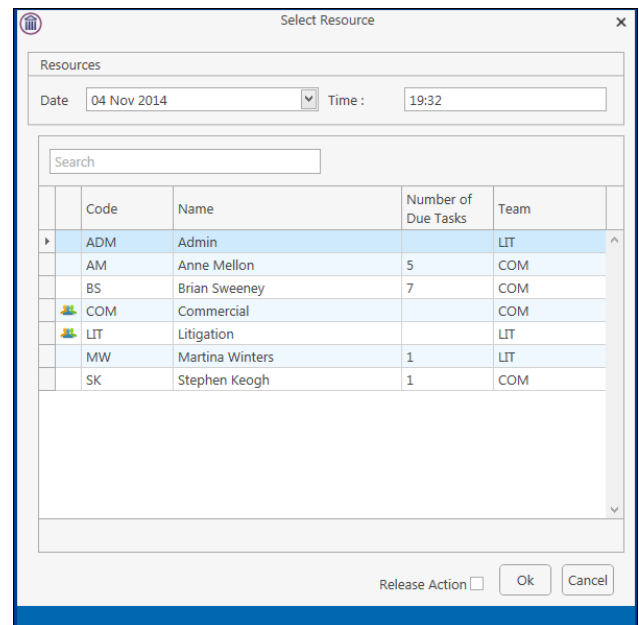


Alternatively, to continue to **own** the task leave the **Release Action** box checked.

 **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.



The 'Select Resource' dialog box shows a list of resources with columns: Code, Name, Number of Due Tasks, and Team. The resources listed are:

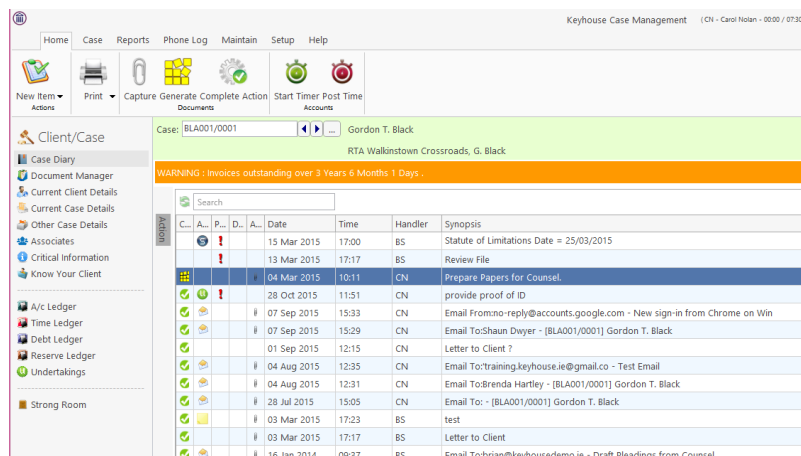
Code	Name	Number of Due Tasks	Team
ADM	Admin		LIT
AM	Anne Mellon	5	COM
BS	Brian Sweeney	7	COM
COM	Commercial		COM
LIT	Litigation		LIT
MW	Martina Winters	1	LIT
SK	Stephen Keogh	1	COM

At the bottom, there is a 'Release Action' checkbox (unchecked) and 'Ok' and 'Cancel' buttons.

## 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.



The screenshot shows the 'Case Diary' window for Case: BLA001/0001, handled by Gordon T. Black. A warning message states: 'WARNING : Invoices outstanding over 3 Years 6 Months 1 Days.' The diary table shows the following entries:

C.	A.	P.	D.	A.	Date	Time	Handler	Synopsis
					15 Mar 2015	17:00	BS	Statute of Limitations Date = 25/03/2015
					13 Mar 2015	17:17	BS	Review File
					04 Mar 2015	10:11	CN	Prepare Papers for Counsel.
					28 Oct 2015	11:51	CN	provide proof of ID
					07 Sep 2015	15:33	CN	Email From: no-reply@accounts.google.com - New sign-in from Chrome on Win
					07 Sep 2015	15:29	CN	Email To: Shaun Dwyer - [BLA001/0001] Gordon T. Black
					01 Sep 2015	12:15	CN	Letter to Client ?
					04 Aug 2015	12:35	CN	Email To: training.keyhouse.ie@gmail.co - Test Email
					04 Aug 2015	12:31	CN	Email To: Brenda Hartley - [BLA001/0001] Gordon T. Black
					28 Jul 2015	15:05	CN	Email To: [BLA001/0001] Gordon T. Black
					03 Mar 2015	17:23	BS	test
					03 Mar 2015	17:17	BS	Letter to Client
					16 Jan 2014	09:37	BS	Email To: brian@keyhousedemo.ie - Draft Pleadings from Counsel

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

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

	A.	P.	D.	A.	Date	Time	Handler	Synopsis
					12 Feb 2016	11:49	CN	Letter to <b>Client</b>
					12 Feb 2016	09:51	CN	Letter to <b>Client</b>
					12 Feb 2016	09:46	CN	Letter to <b>Client</b>
					12 Feb 2016	09:39	CN	Letter to <b>Client</b>
					24 May 2016	17:27	CN	Letter to <b>Client</b>
					12 Feb 2016	11:58	CN	Letter to <b>Client</b>
					01 Sep 2015	12:15	CN	Letter to <b>Client</b> ?
					03 Mar 2015	17:17	BS	Letter to <b>Client</b>
					09 Dec 2010	22:12	BS	Ask <b>Client</b> to call to sign Application form P9B
					18 Nov 2010	22:08	BS	Has <b>Client</b> confirmed appointment ?
					12 Nov 2010	22:06	BS	Send <b>Client</b> for own medical exam.

5. Click **cancel** to reset.



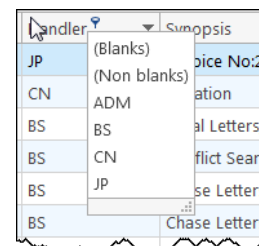
**Tip** to refresh the Case Diary click on refresh tool located next to the search box on the search bar.

## How to sort and filter the Case Diary Columns

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

## How to filter Case Diary Columns

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

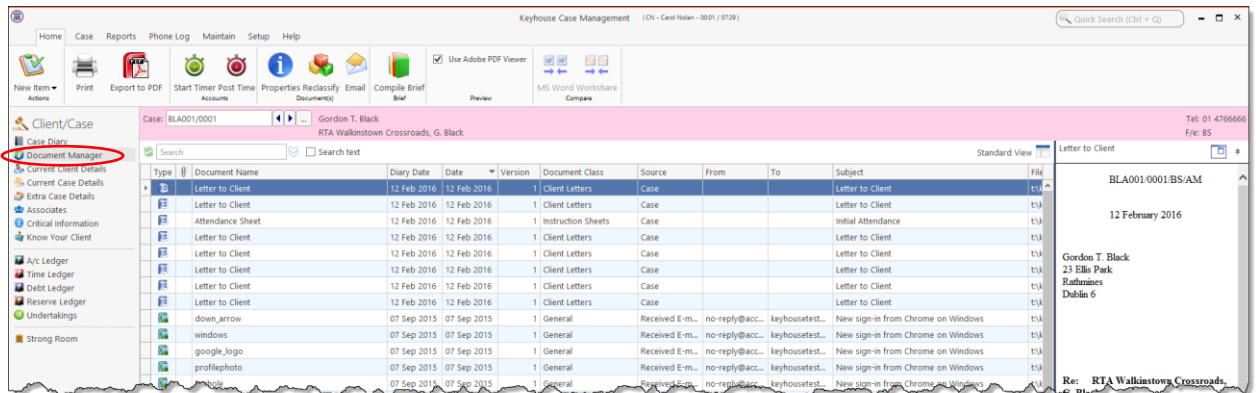


3. To view a list of **filter** categories click on the pin and select the required category. See the following example.

	A.	P.	D.	A.	Date	Time	Handler	Synopsis
					15 Mar 2015	17:00	BS	Statute of Limitations Date = 25/03/2015
					13 Mar 2015	17:17	BS	Review File
					04 Mar 2015	10:11	BS	Prepare Papers for Counsel.
					03 Mar 2015	17:23	BS	test
					03 Mar 2015	17:17	BS	Letter to Client
					16 Jan 2014	09:37	BS	Email To:brian@keyhousedemo.ie - Draft Pleadings from Counsel
					28 Aug 2012	12:33	BS	Medical Report
					29 Nov 2011	11:56	BS	Letter re Finance
					12 May 2011	14:33	BS	Invoice No:218

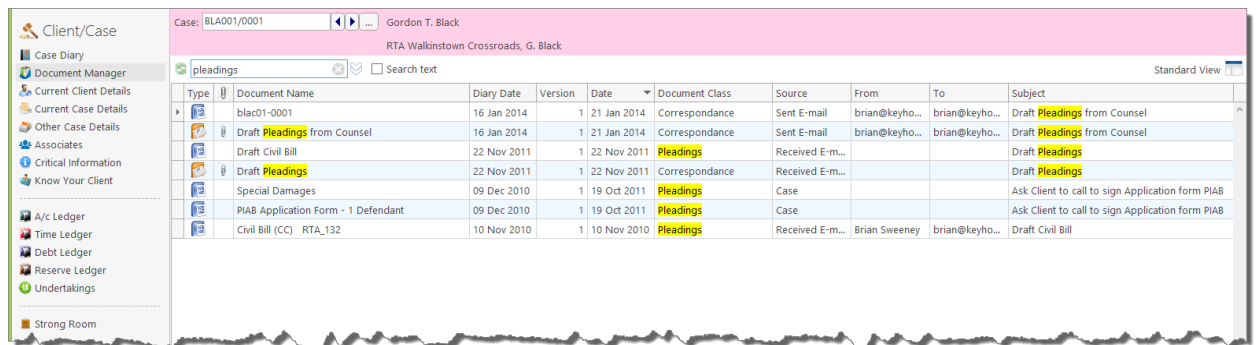
## How to view all documents on a case

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.

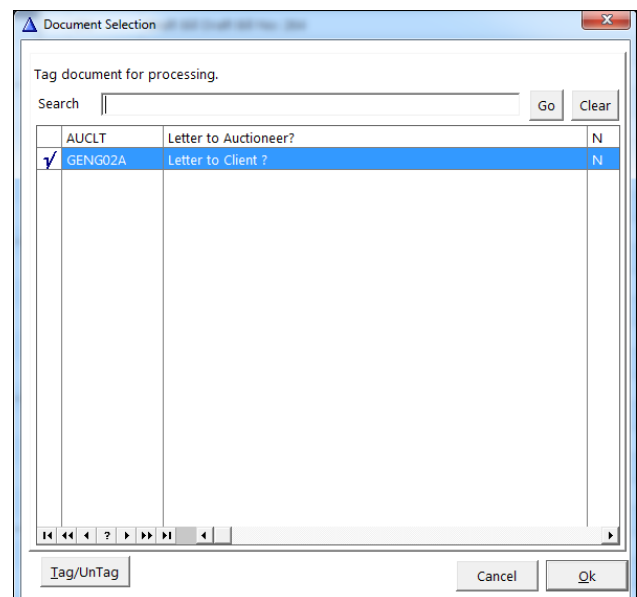
What type of information is requested when processing documents?

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:

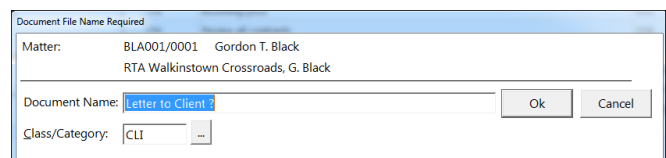
1. A **Document Selection** dialogue box will appear.
2. **Tag** the documents you want to process by putting a tick next to each document that is to be generated.
3. Click **OK** and the documents tagged will be generated.



### 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.

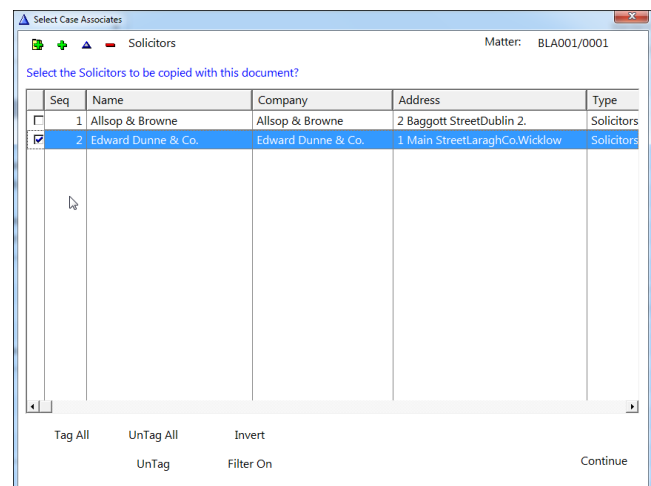
1. The following dialogue box has appeared requesting the user to select a Solicitor for this letter.
2. There are two solicitors assigned to this case, you can tag the solicitor provided then click on the **amend** button  to add a reference.

3. **Input** the other side's reference in "Other Ref" (circled in red, right)
4. 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".

5. A screen will reappear listing the solicitors on the case.
6. Check the appropriate box(es) to **tag** the required solicitor(s).

 **Note** If you tag two solicitors two documents will be generated.

7. Click **Continue**.
8. Word will open displaying the letter to solicitor.
9. **Edit** the document in Word as normal as required.
10. **Save** any changes and **Print** as required.
11. The action/task and document will then be present in the **Case Diary** for future review.



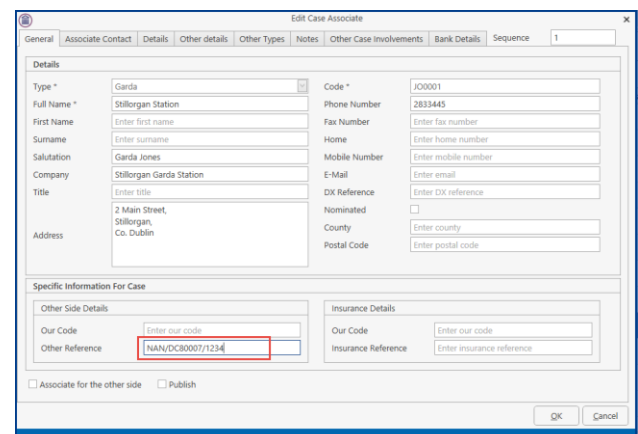
Select Case Associates

Matter: BLA001/0001

Select the Solicitors to be copied with this document?

Seq	Name	Company	Address	Type
1	Allsop & Browne	Allsop & Browne	2 Baggott StreetDublin 2.	Solicitors
<input checked="" type="checkbox"/>	2 Edward Dunne & Co.	Edward Dunne & Co.	1 Main StreetLaraghCo.Wicklow	Solicitors

Tag All UnTag All Invert UnTag Filter On Continue



Edit Case Associate

General Associate Contact Details Other details Other Types Notes Other Case Involvements Bank Details Sequence 1

Details

Type \* Garda Code \* JO0001

Full Name \* Stillorgan Station Phone Number 2833445

First Name Enter first name Fax Number Enter fax number

Surname Enter surname Home Enter home number

Salutation Garda Jones Mobile Number Enter mobile number

Company Stillorgan Garda Station E-Mail Enter email

Title Enter title DX Reference Enter DX reference

Address 2 Main Street, Stillorgan, Co. Dublin Nominated ☐ County Enter county Postal Code Enter postal code

Specific Information For Case

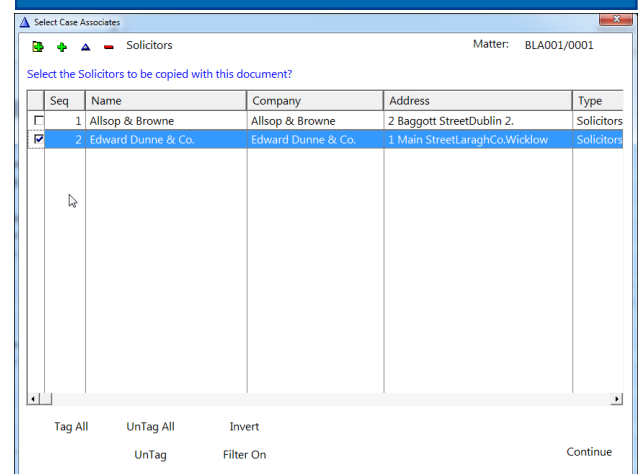
Other Side Details Insurance Details

Our Code Enter our code Our Code Enter our code

Other Reference NAN/DC30007/1234 Insurance Reference Enter insurance reference

☐ Associate for the other side ☐ Publish

OK Cancel



Select Case Associates

Matter: BLA001/0001

Select the Solicitors to be copied with this document?




Seq	Name	Company	Address	Type
<input type="checkbox"/>	1 Allsop & Browne	Allsop & Browne	2 Baggott StreetDublin 2.	Solicitors
<input checked="" type="checkbox"/>	2 Edward Dunne & Co.	Edward Dunne & Co.	1 Main StreetLaraghCo.Wicklow	Solicitors


Tag All UnTag All Invert UnTag Filter On Continue




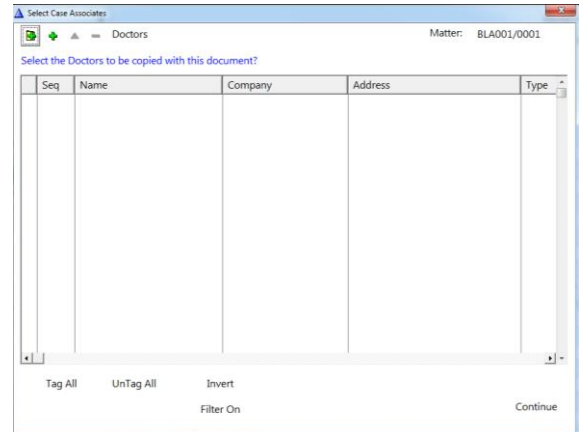
## Example 2: Letter to Doctor – Setting up a new case associate

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 you 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.



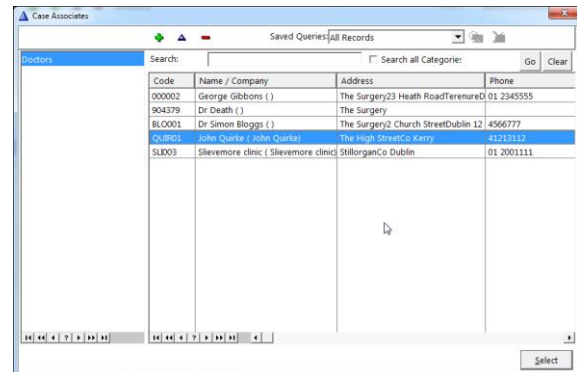
Select Case Associates

Matter: BLA001/0001

Select the Doctors to be copied with this document?

Seq	Name	Company	Address	Type

Tag All UnTag All Invert Filter On Continue



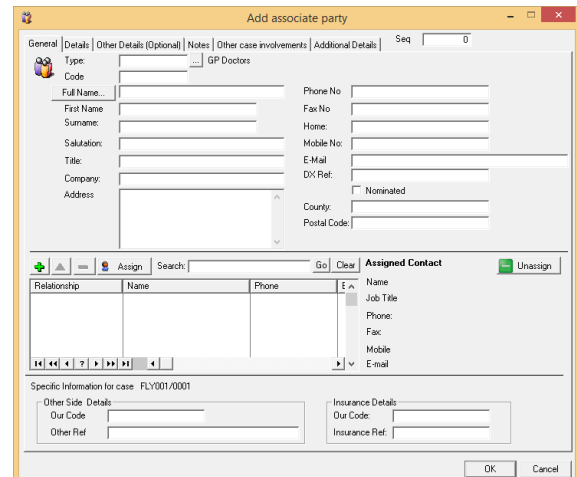
Case Associates

Saved Queries: All Records

Search: Search all Categories: Go Clear

Code	Name / Company	Address	Phone
000002	George Gibbons ( )	The Surgery/23 Heath Road/TenureD	01 2345555
904379	Dr Death ( )	The Surgery	
BL0001	Dr Simon Bloggs ( )	The Surgery/2 Church Street/Dublin 12	4566777
CL0003	John Quirke & John Quirke	The High Street/Co. Kerry	43213112
SU003	Slievemore clinic ( Slievemore clinic)	Stillorgan/Co Dublin	01 2001111

Select



Add associate party

General Details | Other Details (Optional) | Notes | Other case involvements | Additional Details | Seq: 0

Type: GP Doctors

Full Name: First Name: Surname: Salutation: Title: Company: Address: Phone No: Fax No: Home: Mobile No: E-Mail: DX Ref: Nominated: Country: Postal Code:

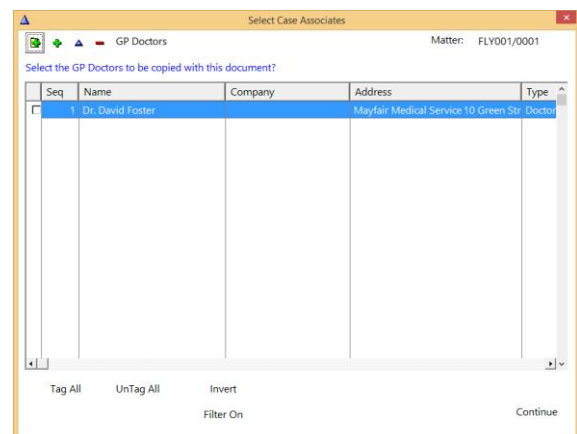
Assigned Contact: Unassign

Relationship	Name	Phone

Specific Information for case: FLY001/0001

Other Side Details: Our Code: Other Ref: Insurance Details: Our Code: Insurance Ref:

OK Cancel



Select Case Associates

Matter: FLY001/0001

Select the GP Doctors to be copied with this document?

Seq	Name	Company	Address	Type
1	Dr. David Foster		Mayfair Medical Service 10 Green Str	Doctor

Tag All UnTag All Invert Filter On Continue

---

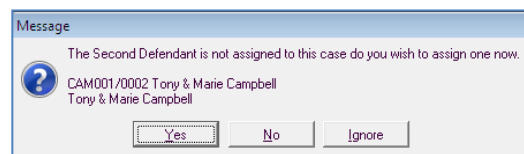
**Example 3: Letter to Lending Institution – Where there is only one lending institution and it is already present in the case associates.**

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 has 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 2<sup>nd</sup> 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.

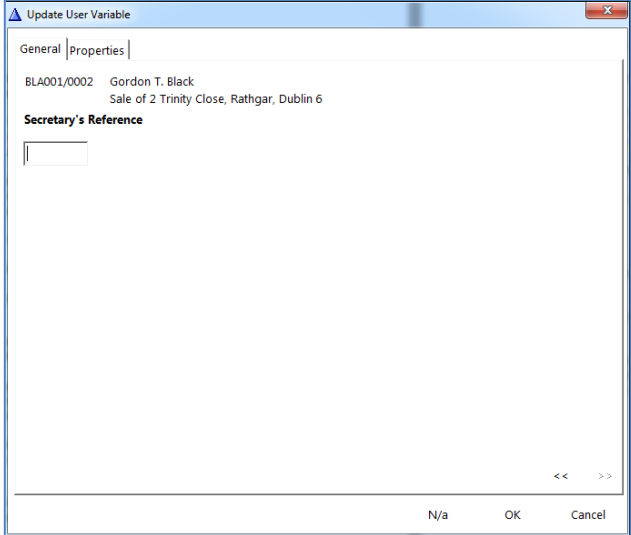
## Answering UDF Questions

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.



Update User Variable

General | Properties


BLA001/0002 Gordon T. Black  
Sale of 2 Trinity Close, Rathgar, Dublin 6

Secretary's Reference

Input box for answer

<< >>

N/a OK Cancel

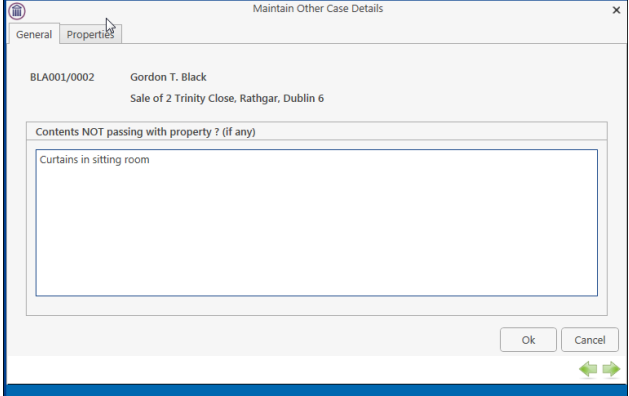


Client/Case

Case: BLA001/0002 Gordon T. Black  
2 Trinity Close, Rathgar, Dublin 6

Form: Default view

Detail	Value
Contents NOT passing with property ? (if 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 known as Folio 10348
Total deeds to be signed by all parties (Schedule in the Contract)	Copy File Here



Maintain Other Case Details

General | Properties

BLA001/0002 Gordon T. Black  
Sale of 2 Trinity Close, Rathgar, Dublin 6

Contents NOT passing with property ? (if any)

Curatins in sitting room

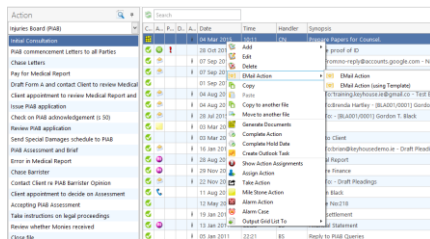
Ok Cancel

## Generating an Email without an Attachment using the Email Template

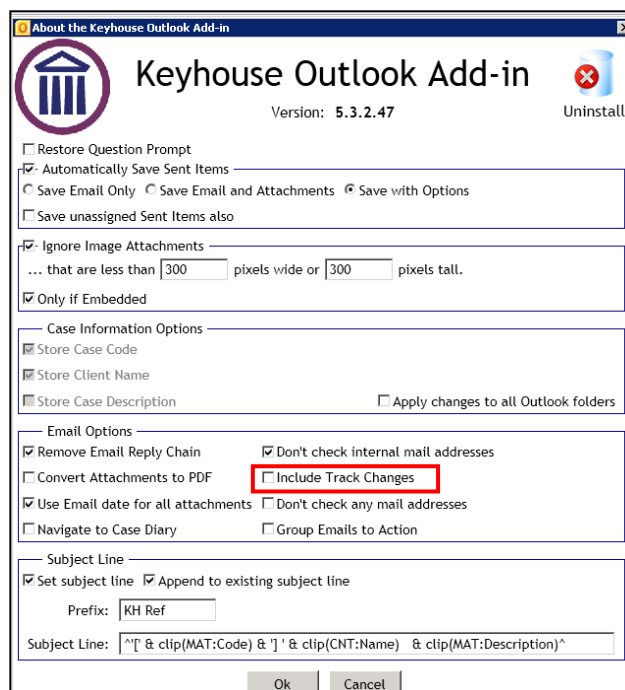
1. Double click on the **action** to generate it.
2. This will take you to **Outlook**. The email can then be edited and sent in the normal way.
3. Return to Keyhouse and **complete** the action in the normal way. See **Marking a Task as Complete** (p. 64) for further information.

## 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 **Email Action**. Then select **Email 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 item 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.

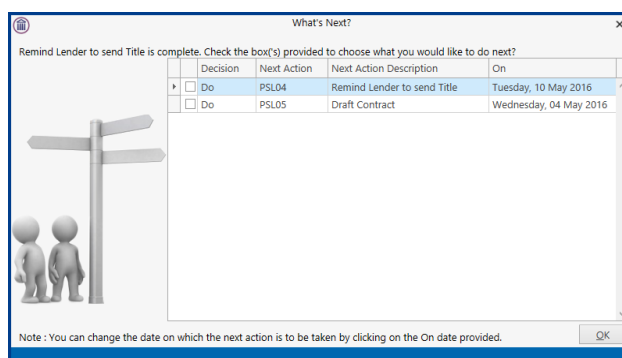
					24 Apr 2010	13:55	BS	Letter to Land Registry
---	--	--	--	---	-------------	-------	----	-------------------------

 **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

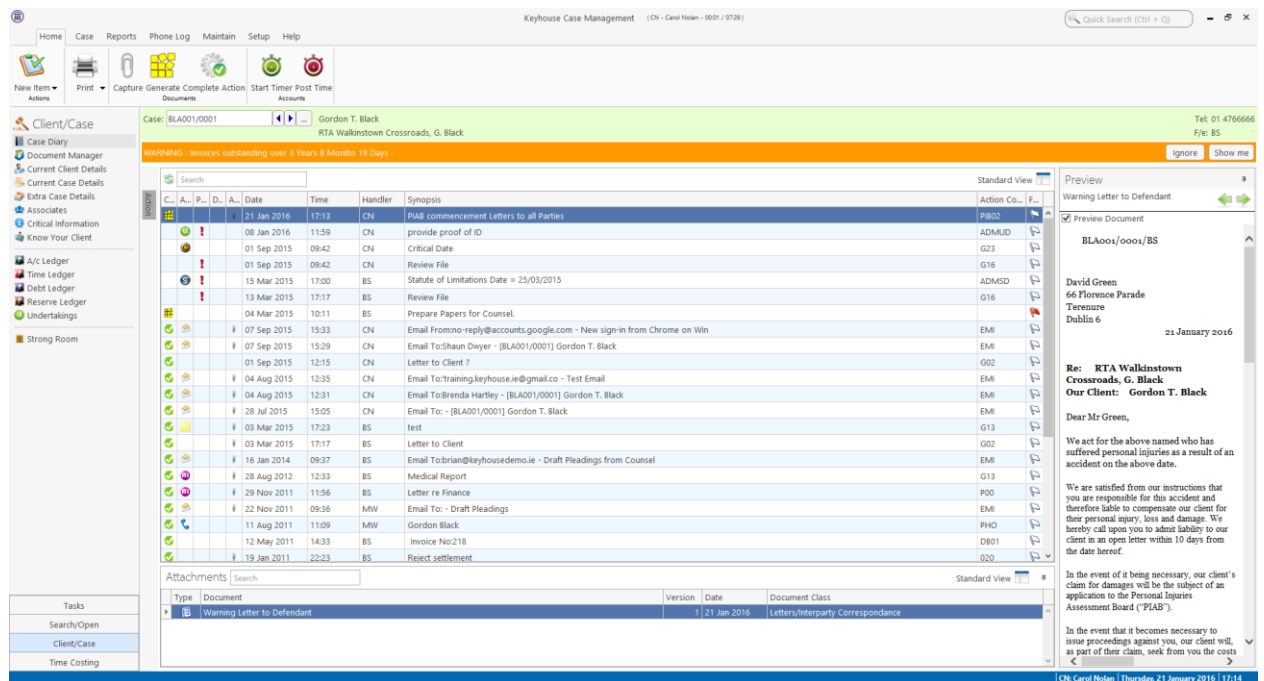


If the follow-up action has been setup to **“ask the user which action to process”** the user will be given a choice to insert in the case diary. The following dialogue box appears **tick the next task** and click **OK**. The task/s will appear in the case diary.


 **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

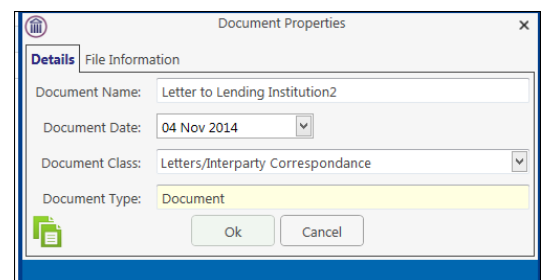
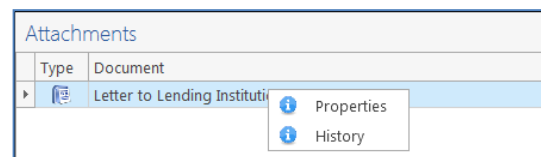


2. **Double Click** on the document in the attachment window. Word will launch and open the document.

 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

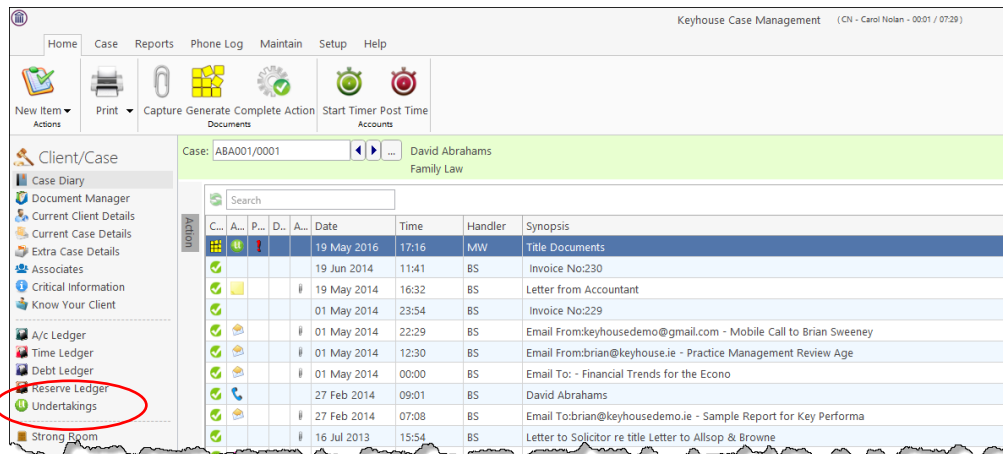
1. From the Attachment pane in the case diary. **Right Click** on the **Document**; the following menu will appear.
2. **Click on** properties and the following dialogue box will appear.
3. **Amend** the document name and class as required.
4. Click **OK** when complete.
5. A **message** will appear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



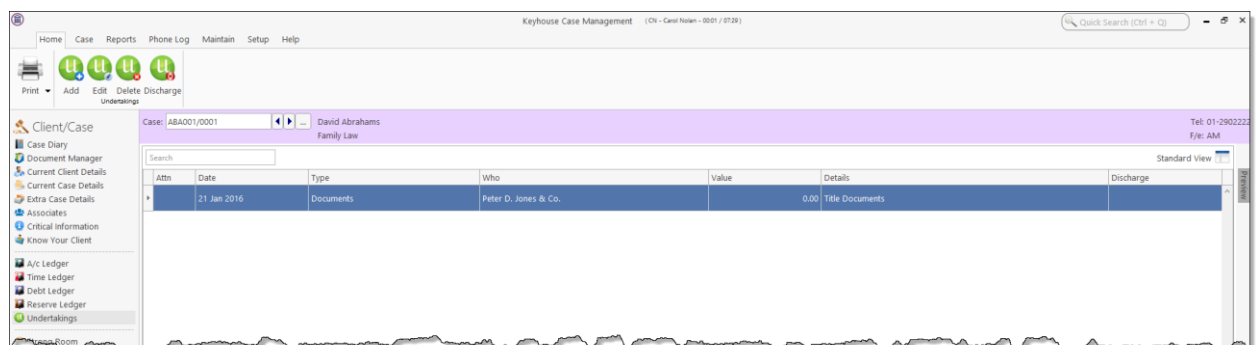
## Undertakings

### 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.

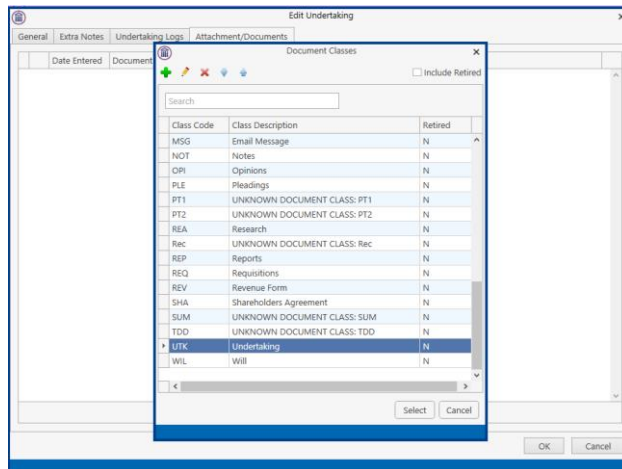
**How to Edit an Undertaking**

- 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.

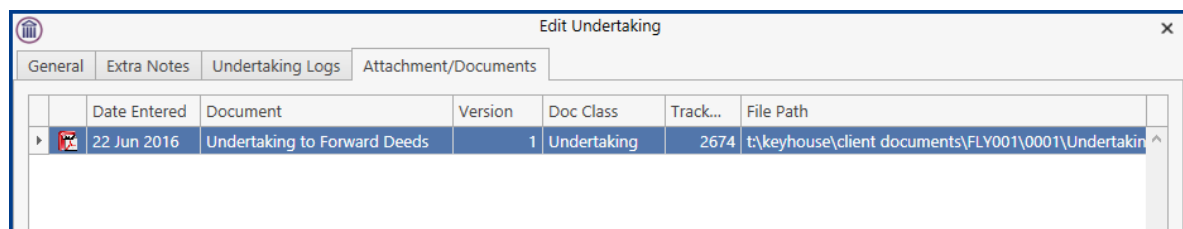
**How to Add a Document to an Undertaking**

- 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

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

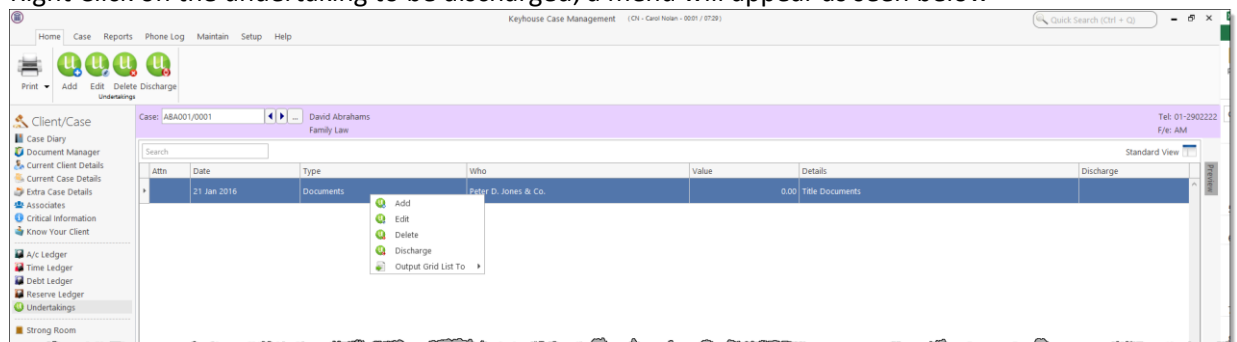


- The document is now visible on the Undertaking Screen.



## How to Discharge an Undertaking

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



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

## 4. Input a description in the discharge description box.

Discharge Undertaking

General Extra Notes Undertaking Logs

Client: Family Law Add as Comment to Ledger Needs Attention

Matter: 27 Jun 2014 Diary Warning Date: 19 Apr 2016

Type: Financial Documents Given or Received Commercial or Non-Commercial

Authorised Fee Earner: Undertaking To: Select undertaking to X

Who: Peter D. Jones & Co.

Details: Title Documents

Value: 0.00 Dealing Number: Enter dealing number

Status: Pre Registration Category: Select Category

Conditional: 19 Apr 2016

Discharge Date: 19 Apr 2016

Discharge Description:

OK Cancel

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.

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

Keyhouse Case Management - CN - Carol Nolan - 00001 (7/10)

Home Case Reports Partners Phone Log Maintain Setup Help

Print Add Edit Discharge Undertakings

Search/Open

Adm	Matter Ref	Client	Matter	Undertaking	Undertaking...	Discharge Date	Authorised By...	Value	Type	For Who	Status	Action...	Given	Discharge Descript...
	BAR001/0002	Tony Barry	Purchase 23 L...	First Active - Undertaking re Sa...	10 Mar 2010	21 Sep 2011	Justin Phelan	245400.00	F	First Active	NA	721	Given	
	BIL001/0001	Noel Billing	RTA Brennan...	VH - Refund medical expenses...	30 Jun 2010		Carol Nolan	105000.00	F	VH - Refund...	NA	722	Given	
	DEV001/0001	Noel Devlin	Credit Card D...	MBNA - repay credit card debt...	03 Apr 2011		Stephen Keogh	15124.26	F	MBNA credi...	NA	723	Given	
	DCH001/0003	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 Brights...	NAB - return title deeds & sale...	30 Jan 2010	30 Apr 2010	Carol Nolan	0.00	D	NAB Sale Proc...	NA	725	Given	
	CAM001/0002	Tony & Marie	Purchase 66 A...	Discharge balance of purchase...	20 Apr 2010	16 Feb 2012	Justin Phelan	202000.00	F	EOB Discharg...	NA	728	Given	
	CAM001/0001	Tony & Marie	Sale 6 Brights...	Redeem Mortgage to BOI	08 Apr 2010	16 Feb 2012	Justin Phelan	238342.50	F	BOI Redeem...	NA	729	Given	
	DEM001/0002	John Demonan	RTA - Donnyb...	Pay Church & General - Insuran...	28 Feb 2009	03 Apr 2009	Brian Sweeney	23500.00	F	Church & Gen...	NA	730	Given	
	FOX001/0001	Jennifer Fox	Redundancy a...	All personal loan	24 May 2010		Martina Winte...	45000.00	F	All personal L...	NA	732	Given	
	PUR001/0001	Mick Purcell	Lease renewal...	To furnish original life policy do...	12 May 2010		Brian Sweeney	0.00	D	AIB	NA	733	Given	
	KEL001/0001	Mary Keller	Loan - 96 Kilg...	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 Crum...	Redeem credit card debt	15 Jan 2009	22 Mar 2009	Justin Phelan	7891.00	F	MBNA Cred...	NA	760	Given	
	LYN001/0001	Roger Lynch	Sale 89 Crum...	Repay loan out of sale proceeds	15 Jan 2009	22 Mar 2009	Justin Phelan	12134.67	F	Crumlin & Dis...	NA	761	Given	
	LYN001/0001	Roger Lynch	Sale 89 Crum...	Pay loan and overdraft from sa...	15 Jan 2009	22 Mar 2009	Justin Phelan	3852.65	F	AIB	NA	762	Given	
	LYN001/0001	Roger Lynch	Sale 89 Crum...	Repay car loan out of sale proc...	15 Jan 2009	16 May 2009	Justin Phelan	23548.67	F	GE Money	NA	763	Given	
	ODV001/0001	Sean O'Dwyer	Re-mortgage...	Discharge stamp duty on remo...	25 Nov 2010		Justin Phelan	15000.00	F	Revenue Com...	NA	764	Given	
	ODV001/0001	Sean O'Dwyer	Re-mortgage...	Discharge Tax Liability for 2007...	23 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	
	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	
	QUO001/0001	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 Soms...	Title Deeds	19 Oct 2011	04 May 2011	Brian Sweeney	600000.00	D	First Active	Pre R...	795	Given	
	BUT001/0002	Noel Butler	Lease Agree...	Title Deeds	30 Nov 2011		Brian Sweeney	200000.00	D	EBB Bray	Pre R...	826	Given	
	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	
	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	
	RES001/0001	Business Time	Lease of Unit...	Title Deeds	12 Jul 2011		Brian Sweeney	670000.00	D	First Active	Pre R...	1203	Rece...	
	ABA001/0001	David Abrah...	Family Law	Title Documents	27 Jan 2014		Martina Winte...	0.00	D	Peter D. Jone...	Pre R...	1388	Rece...	
	TOR001/0001	Auril Tobin	Sale of The C...	Title Deeds	01 Dec 2011		Brian Sweeney	300000.00	F	Trustee Sav...	Pre R...	1412	Given	
	LAW001/0001	Liz Lawlor	Advice re rth...	Title Deeds	02 Feb 2012		Brian Sweeney	300000.00	D	EBB Bray	Pre R...	1553	Given	
	BLD001/0004	Joe Bliggs	Commercial...	Title Deeds	14 Feb 2012		Martina Winte...	0.00	D	Dun Laogha...	Pre R...	1582	Given	
	CLD01/0001	Bill Clinton	Unfair dismis...	overdraft	15 Mar 2012		Martina Winte...	6750.00	F	National Irish...	Pre R...	1609	Given	
	ABR001/0001	George J Abb...	Sale 45 Soms...	Title Deeds	27 Feb 2015		Brian Sweeney	450000.00	D	First Active pl...	Pre R...	2911	Given	
	DEA001/0002	James Deane	Sale 36 Green...	Title Deeds	21 Feb 2015		Brian Sweeney	350000.00	D	First Active pl...	Pre R...	2932	Rece...	

Count: 39

Tasks Search/Open Client/Case Time Costing

Preview

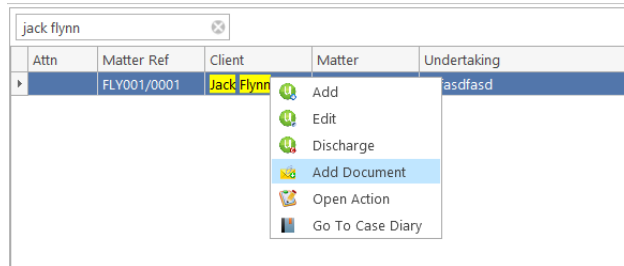
Undertaking changed by BRIANNS  
Date: 10/03/2009  
Type: Financial  
Given  
Authorised By: CN Carol Nolan  
Undertaking to: First Active plc/First Active  
Details: First Active - Undertaking re Sale of 17 Douglas Road Snafield Dublin 1 - redeem mortgage  
Comment: First Active  
Value: 245400  
Status: NA  
Dealing Number: TB298011

Undertaking Created:  
Date: 10/03/2009  
Type: Financial  
Given  
Authorised By: CN Carol Nolan  
Undertaking to: First Active - Undertaking re Sale of 17 Douglas Road Snafield Dublin 1 - redeem mortgage  
Comment: Problem with title monies in client a/c  
Value: 245400  
Status: NA  
Dealing Number: TB298011

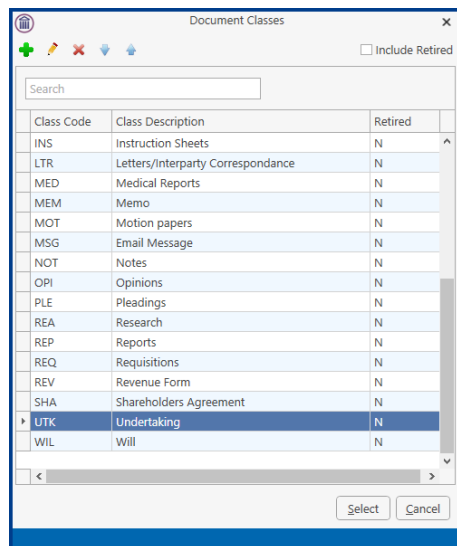
CN Carol Nolan | Monday, 09 May 2016 | 17:16

## Attaching Undertaking Documents using the Undertakings Register

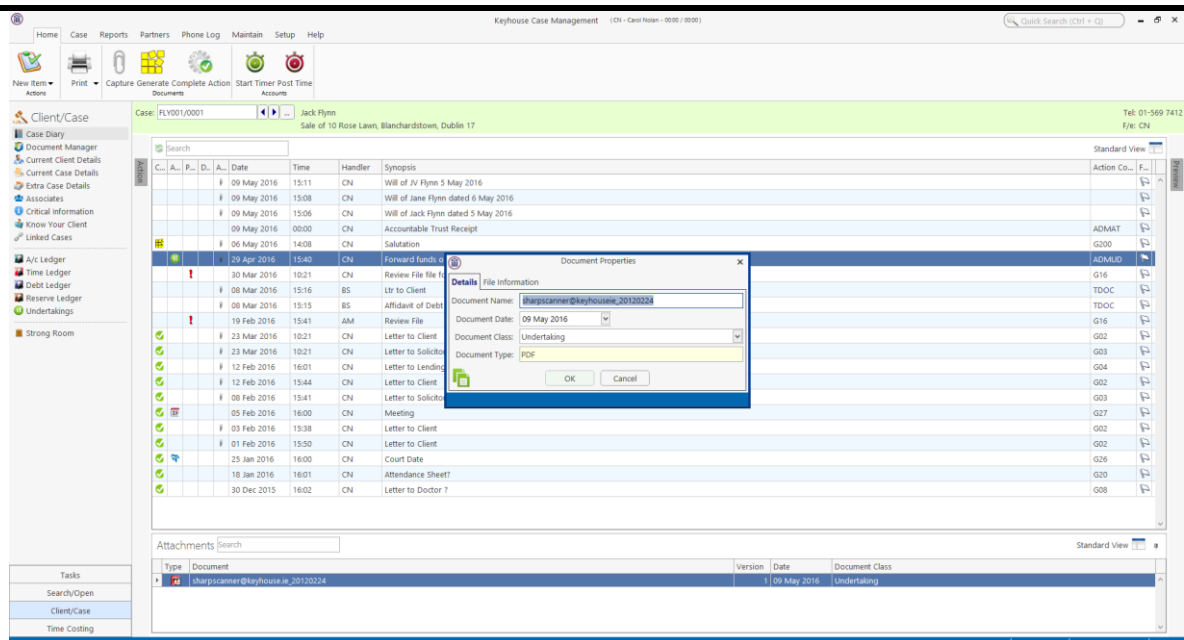
1. Go to **Search Open** and select **Firm Undertakings**.
2. Search for the required **Undertaking** and right click.



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**.

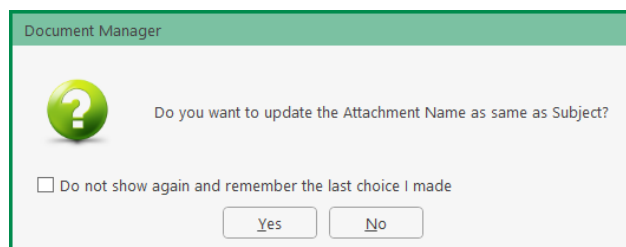


6. The document is now visible in the **Case Diary**. Go to the **Case Diary** and locate the **Undertaking**.
7. If the document needs to be renamed go to the **Attachment** Section, select the document and right click.
8. Select **Properties**.



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**.



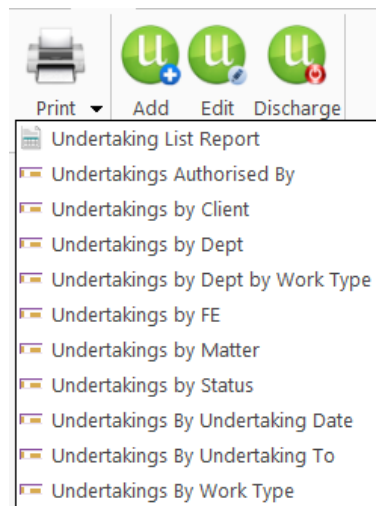
## Undertaking Reports

Reports on Undertakings can be created based on several 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.



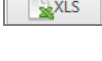
2. Select **Print** and a list of reports will appear.



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.

Dept	Client	Matter	Undertaking Date	Undertaking type	Auth. By	Sealing Number	Given Rec	Status	Value
COM	BE5001	Commercial Business Time Limited	12/07/2011	Document	BS	6789F	Received	Pre Registration	670,000.00
BS	BE5001/0001	Lease of Unit 33, Eastgate Avenue, Du		For : First Active Title Deeds				To: <a href="#">First Active etc</a>	
BL0001	SK	Joe Bloggs BLO001/0004	14/02/2012	Document	MW		Given	Pre Registration	0.00
		Commercial Work		For : Dun Laoghaire Rathdown County Council				To: <a href="#">Dun Laoghaire Rathdown Coun</a>	
				Title Deeds					
LAW001	BS	Liz Lawlor LAW001/0001	02/02/2012	Document	BS		Given	Pre Registration	300,000.00
		Advice re inheritance tax		For : EBS Gray Title Deeds				To: <a href="#">Educational Building Societ</a>	
PUR001	BS	Mick Purcell PUR001/0001	12/05/2010	Document	BS		Given	Pre Registration	0.00
		Lease renewal - rent review reduction		For : AIB To furnish original title policy documents to be received from Uistler Bank				To: <a href="#">AIB</a>	
BUT001	JP	Noel Butler BUT001/0002	30/11/2011	Document	BS	F567777	Given	Pre Registration	200,000.00
		Lease Agreement - Unit 2, Green Bust		For : EBS Gray Title Deeds				To: <a href="#">Educational Building Societ</a>	

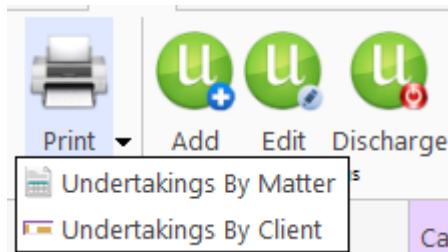
6. Click on print  or click on one of the following options available on the report toolbar:

- 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



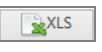
1. Click to **Case Diary** and select **Undertakings** from the Column on the left.
2. Click on the **Print** option on the Ribbon.



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

A screenshot of a dialog box titled 'Undertakings by Client'. Inside the dialog, there is a section titled 'Enter Report Criteria'. Below this title, there are several fields and dropdown menus: 'To Date' (09 May 2016), 'Discharge Status' (Not Discharged), 'From Client Code (Blank for All)' (FLY001), 'New Page Per Client' (checked), 'Open or Closed Matters' (Open), 'Given or Received' (All), 'From Date' (10 May 2015), 'Financial or Documentation' (All), 'Commercial or Non-Commercial' (All), and 'To Client Code (Blank for all)'. At the bottom right of the dialog, there are 'Run' and 'Close' buttons.

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

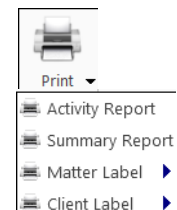
1. **Open** the required case in the Case Diary
2. Click on **Critical Information** on the **Navigation** panel. The following screen will appear displaying critical Information.

The screenshot displays the Keyhouse Case Management software interface. The top menu bar includes Home, Case, Reports, Phone Log, Maintain, Setup, and Help. The left-hand navigation panel shows various options like Case Diary, Document Manager, and Critical Information, with 'Critical Information' currently selected. The main window displays details for case BLA001/0001, including a client summary table, current matter details, case status, outstanding critical dates, and undertakings. The client summary table shows various financial and time-related metrics, while the current matter details section provides information on start dates, fee earners, and case status. The case status table lists actions and dates, and the outstanding critical dates table shows dates and descriptions. The undertakings table lists descriptions, values, and who/when given/received. At the bottom, there is a table for time by fee earner, showing work in progress and total time for various staff members.

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:

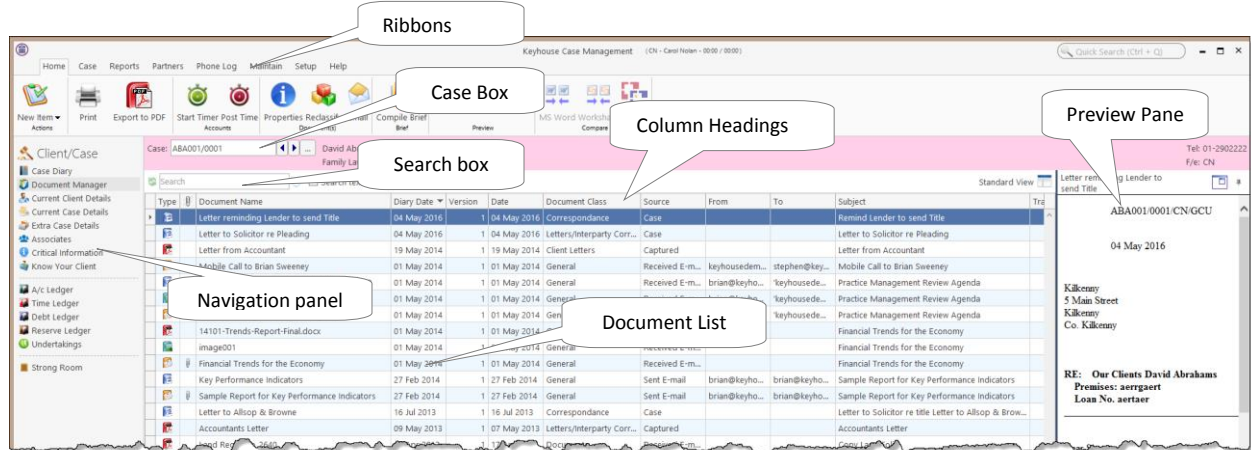
- Chapter 6 for the Keyhouse Capture
- Chapter 7 for the template Library
- Chapter 8 for the Conflict Search
- Chapter 10 for the Strong Room
- Chapter 11 for Time Recording
- Chapter 12 for Accounts
- Chapter 13 for the Debt Ledger
- Chapter 14 for the Reserve Ledger

## Chapter 5: Using the Document Manager

### Document Manager

#### Getting around Document Manager

Below is an image of the Document manager window.

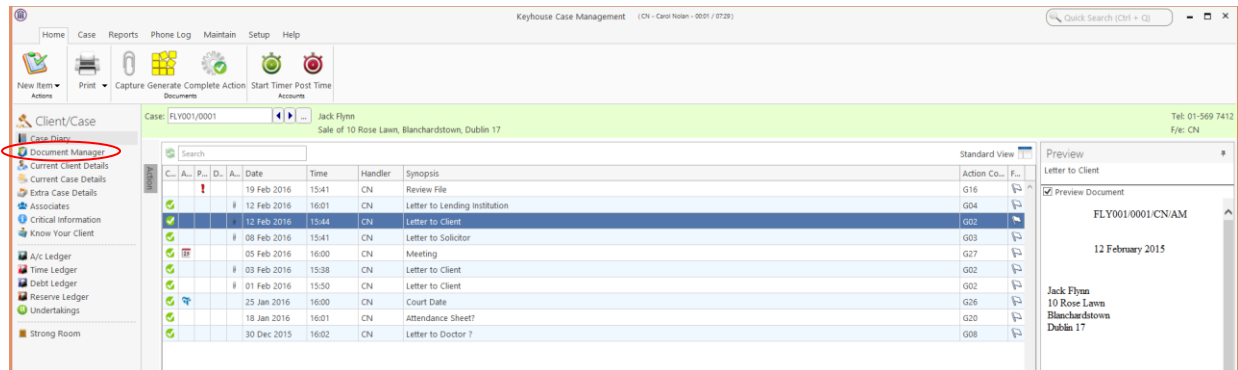


Window area	Description
Case Box	Input the case reference in this box or click the ... browse button and search for the required case.
Column Headings	Click the column headings to sort the list of documents by name, version, diary date, document date, document class, Source, From, To, Subject.
Document 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

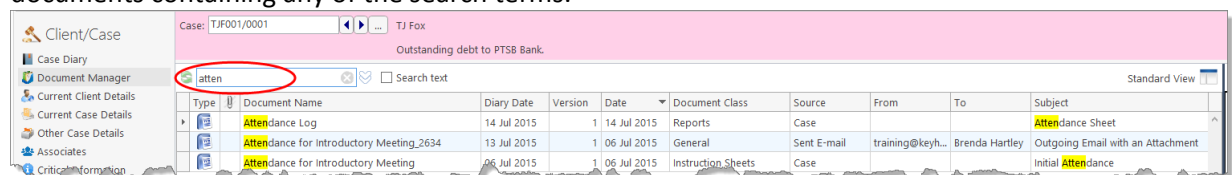
Home tab	Description
	Print
	Show document properties
	Reclassify: change the document class
	Click to email current document
	Compile Brief: If no Brief currently exists, this button launches the <b>Brief Wizard</b> . If there is an existing Brief, this button opens the existing Brief in the <b>Brief Maintenance</b> 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



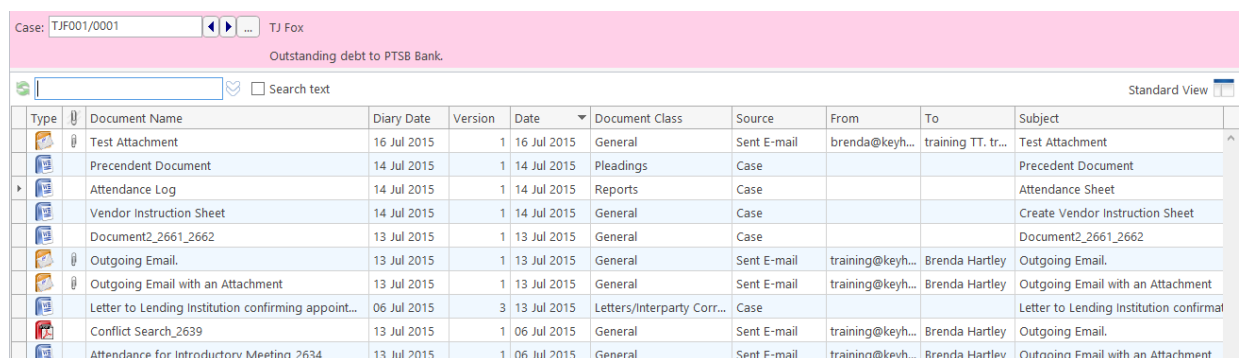
documents containing any of the search terms.



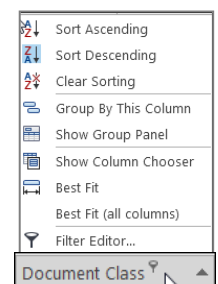
4. **Select** a document to see a preview. **Double click** to the open the document.

## 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.

Search  ☐ Search text

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
	Document2_2661_2662	13 Jul 2015	1	13 Jul 2015	General	Letters/Interparty Correspondance			Doc
	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
	Outgoing Email with an Attachment	13 Jul 2015	1	13 Jul 2015	General	Sent E-mail	training@keyh...	Brenda Hartley	Outc
	Conflict Search	06 Jul 2015	1	06 Jul 2015	Conflict Search	Case			Conf
	Attendance for Introductory Meeting	06 Jul 2015	1	06 Jul 2015	Instruction Sheets	Case			Initia
	Letter to Lending Institution confirming appoin...	06 Jul 2015	3	13 Jul 2015	Letters/Interparty Corr...	Case			Lette
	Letter to Lending Institution confirming appoin...	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	Versi
▶ Document Class: Attendance Sheet		
▶ Document Class: Letters/Interparty Correspondance		
▶ Document Class: Medical Reports		

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

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

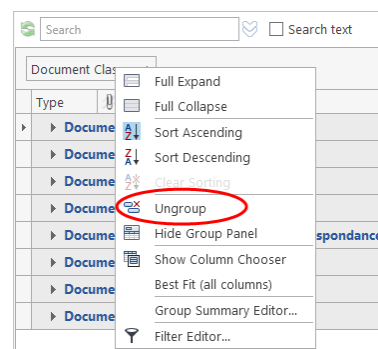
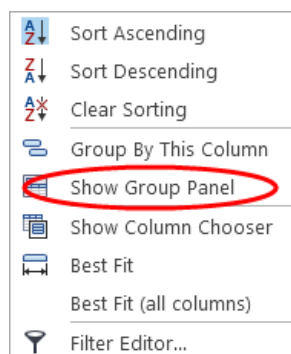
Type	Document Name	Version	Diary Date	Date	Source	From	To	Subject
▶ Document Class: Attendance Sheet								
▶ Document Class: Letters/Interparty Correspondance								
	Letter to Client	1	20 Apr 2010	29 Jan 2011	Case			Letter to Client re advice
	Letter to Solicitor	1	24 Apr 2010	29 Jan 2011	Case			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.

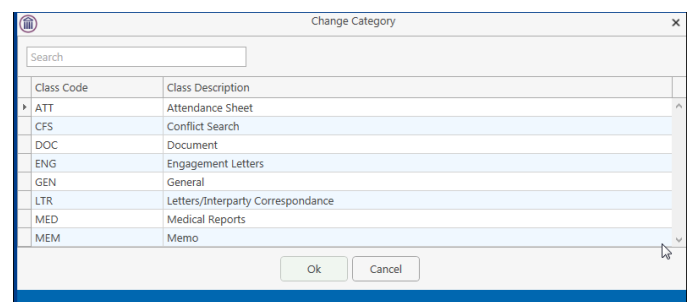


## How to reclassify Documents

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.

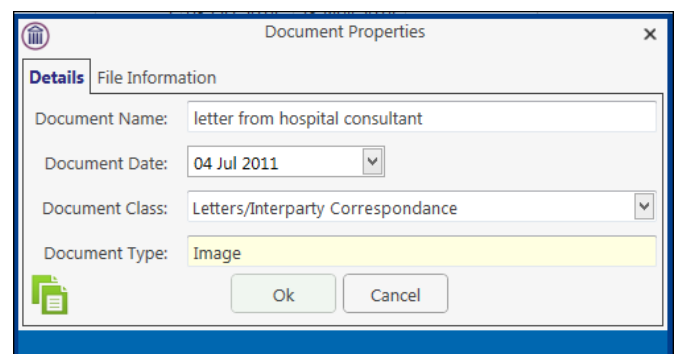
2. **Search** for the required category, if necessary, and select it.



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.



3. 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.
4. 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)

1. 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.

2. 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 Manager for each matter or it can be created on a matter by matter basis. 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.

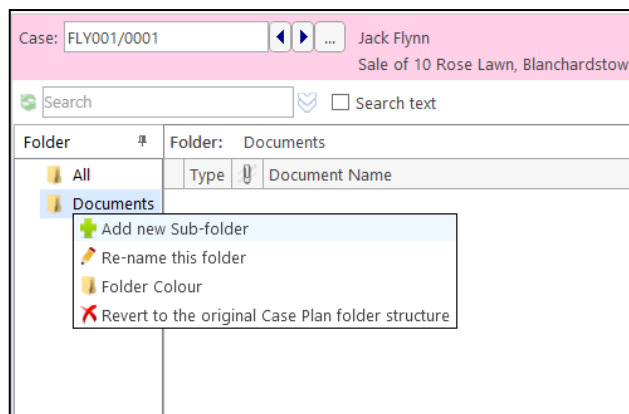
1. Go to the **Document Manager**.

Case: FLY001/0001 Jack Flynn Sale of 10 Rose Lawn, Blanchardstown, Dublin 17									
Search <input type="text"/> <input type="checkbox"/> Search text Standard View 									
Folder: All	Type	Document Name	Diary Date	Version	Date	Document Class	Source	From	To
		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

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

Case: FLY001/0001 Jack Flynn Sale of 10 Rose Lawn, Blanchardstown, Dublin 17									
Search <input type="text"/> <input type="checkbox"/> Search text									
Folder: All	Type	Document Name	Diary Date	Version	Date	Document Class	Source	From	To
All		Section 68 Letter	30 Dec 2015	1	24 May 2016	Correspondance	Case		
Documents		Ltr to Client re serches	30 Mar 2016	1	11 May 2016	Letters/Interparty Corr...	Capture		
		Letter to Doctor	10 May 2016	1	10 May 2016	Letters/Interparty Corr...	Case		
		Will of Jack Flynn dated 5 May 2016	30 May 2016	1	09 May 2016	Will	Capture		
		Will of JV Flynn 5 May 2016	09 May 2016	1	09 May 2016	Will	Capture		
		Will of Jane Flynn dated 6 May 2016	09 May 2016	1	09 May 2016	Will	Capture		
		Undertaking to forward funds	29 Apr 2016	1	09 May 2016	Undertaking	Capture		
		Letter to Solicitor	23 Mar 2016	1	23 Mar 2016	Letters/Interparty Corr...	Case		
		Letter to Client	23 Mar 2016	1	23 Mar 2016	Client Letters	Case		
		Ltr to Client	08 Mar 2016	1	08 Mar 2016	Letters/Interparty Corr...	Capture		
		Affidavit of Debt DMD	08 Mar 2016	1	08 Mar 2016	Documents	Capture		
		Letter to Lending Institution	12 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr...	Case		
		Letter to Client	12 Feb 2016	1	12 Feb 2016	Client Letters	Case		
		Letter to Solicitor	08 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr...	Case		
		Letter to Client	03 Feb 2016	1	12 Feb 2016	Client Letters	Case		
		Letter to Client	01 Feb 2016	1	12 Feb 2016	Client Letters	Case		

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	#	Folder:
All		Type   Document Name
Documents		Diary Date
Agreements		Section 68 Letter   30 Dec 2015
Tennancies		Ltr to Client re serches   30 Mar 2016
Reports		Cut and Paste   08 Mar 2016
		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**.

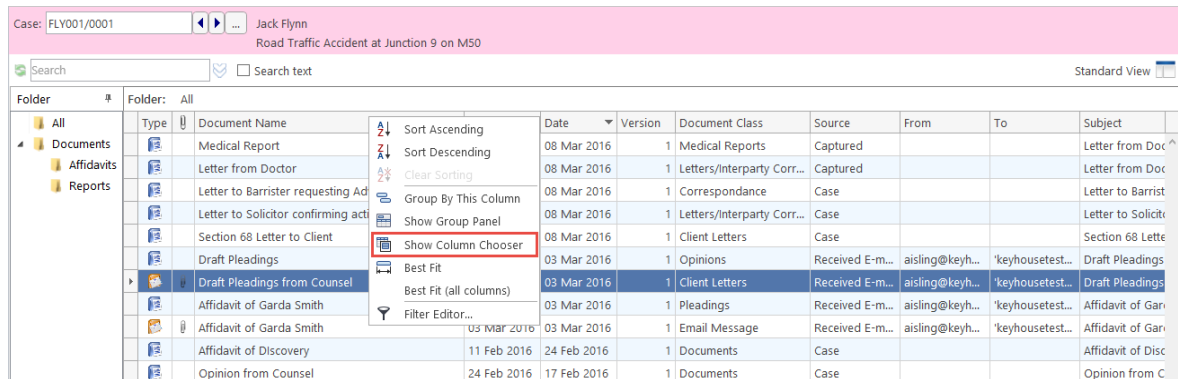
Folder	#	Folder:	Type	Document Name	Diary Date	Version	Date
All		Documents >>> Report					
Documents				Undertaking to forward funds	29 Apr 2016	1	09 May 2016
Agreements				Will of JV Flynn 5 May 2016	09 May 2016	1	09 May 2016
				Jane Flynn dated 6 May 2016	09 May 2016	1	09 May 2016
				Jack Flynn dated 5 May 2016	30 May 2016	1	09 May 2016
				Letter to Solicitor	23 Mar 2016	1	23 Mar 2016
				Letter to Client	23 Mar 2016	1	23 Mar 2016
				Ltr to Client	08 Mar 2016	1	08 Mar 2016

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**.

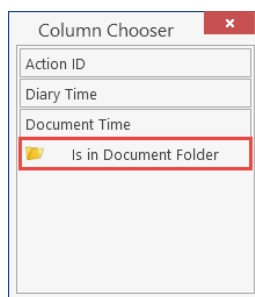
## Check if Document are Assigned to Folders

It may be necessary to check if all documents are assigned to folders. This can be done by adding a new field to the Header Row.

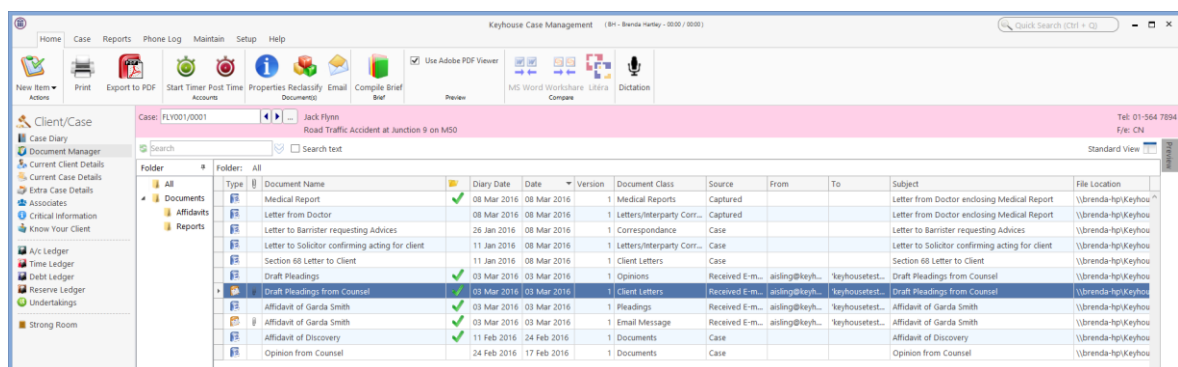
1. Right click on the Header Row and click on **Select Column Chooser**



2. Click on **Is in Document Folder**



3. Drag to the Header Row and place in the required location



4. To retain these settings, create a new view. See Pg 181 for notes on how to create a new view.

**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

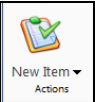

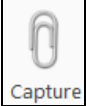
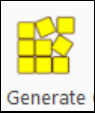

The screenshot displays the Keyhouse Task Manager interface. Callouts identify the following components:

- Toolbar:** Located at the top, containing icons for Home, Case, Reports, Phone Log, and Maintenance, along with buttons for 'New Item', 'Print', 'Capture', 'Generate', 'Complete', and 'Action'.
- Search Box:** A text input field for searching tasks, currently containing 'Carol Nolan'.
- Task views:** A sidebar on the left with filters for 'My tasks', 'Team tasks', 'Day's tasks', 'Next week's tasks', 'Next month's tasks', 'Overdue tasks' (selected), 'Outstanding tasks', 'Last week's tasks', 'Last month's tasks', 'All tasks', and 'My Overview'.
- Task list:** The main table displaying task details. The table has columns: Date, Time, Case Code, Handler, Team, From, Client/Case/Matter, Action, and Diary Date. It shows a list of tasks for 04 Nov 2014, including actions like 'Review File', 'Letter to Solicitor', 'Letter to Lending Institution', 'Instruction Received', and 'Letter to Client'.
- Document Preview Pane:** A panel on the right showing a preview of a document titled 'Letter to Lending Institution'. It includes a header with 'OUR REF', 'YOUR REF', and 'DATE', followed by a 'Re:' line with client details and a 'Dear Sir' salutation.

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 Institution	04 Nov 2...
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	17:03	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 Doctor	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	16:53	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...

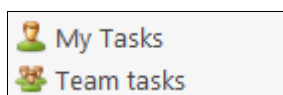
Count=60

## The Home Tab in Task Manager

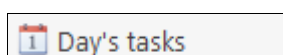
	<b>New</b>	Click on the New to add any of these tasks.	<ul style="list-style-type: none"> <li>Action</li> <li>Note</li> <li>Email</li> <li>Appointment</li> <li>Phone Message</li> <li>Dictation</li> <li>Draft Invoice</li> <li>Request Cheque</li> <li>Conflict Search</li> </ul>
	<b>Printer</b>	Click to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

## 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.



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



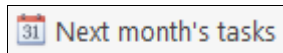
Click on this to view today's tasks.

From  To

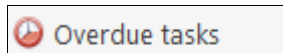
Select a range of dates.



Click to view next week's tasks.



Click to view next month's tasks



Click to view Overdue tasks



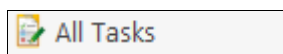
Click to view outstanding tasks i.e. past, present or future.



Click to view Last Week's outstanding tasks.



Click to view Last Month's outstanding tasks.



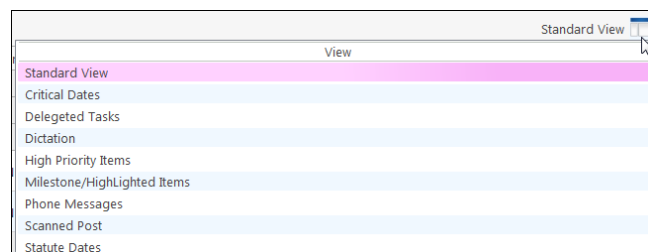
All Tasks shows all outstanding tasks





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.



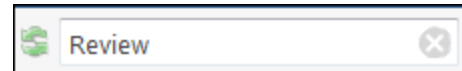
## How to Show/Hide the Preview Pane

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 <input type="text"/>											
Standard View <input type="checkbox"/>											
		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	14:53					Melinda Fitzgerald	Review		

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.

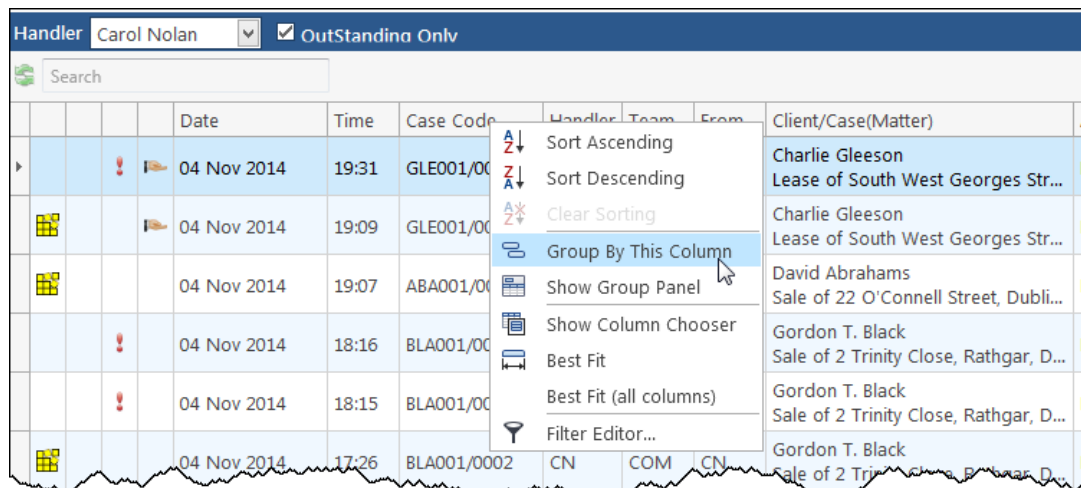
### How to Filter the Task Manager

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	From	Client/Case(Matter)	Action	Diary Date	
		04 Nov 2014	18:16	BLA001/0001	(Non blanks)						
		04 Nov 2014	18:15	BLA001/0001	AAA001/0001	M	CI				
		04 Nov 2014	17:26	BLA001/0001	AAA001/0003	M	CI				
		04 Nov 2014	17:25	BLA001/0001	AAA001/0003	M	CI				
		04 Nov 2014	17:25	BLA001/0001	AAA001/0003	M	CI				
		04 Nov 2014	17:24	BLA001/0001	AAA001/0003	M	CI				
		04 Nov 2014	17:24	BLA001/0001	AAA001/0003	M	CI				
		04 Nov 2014	17:19	BLA001/0001	AAA001/0003	M	CI				
		04 Nov 2014	17:11	BLA001/0001	AAA001/0003	M	CI				

## 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.

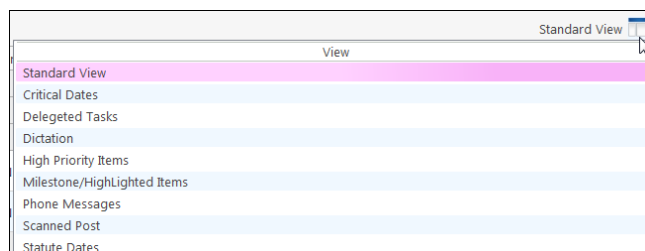


2. Click on **Group By This column**. See the following example of a grouping by fee earner

			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

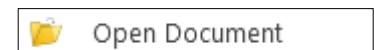
1. **Right click** on the task you want to generate, and select **Generate Documents** from the pop-up menu.



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

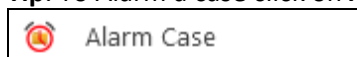
1. **Right click** on the task you want to alarm and select **Alarm Action** from the pop-up menu. The following screen will appear.
2. Using the drop-down arrow set a **Date**
3. Input a Time for the alarm.
4. Assign it to yourself or all delegates.
5. Click **OK**.



 A dialog box titled "Maintain TaskAlarm" with the following fields:
 

- MatterCode: BLA001/0001
- Alarm: Letter to Solicitor
- Date: 04 Nov 2014 (dropdown), Time: 5:15
- Text: Letter to Solicitor
- Assign To: Carol Nolan (selected), All Delegates (radio button)
- 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.
2. Select the **name** required from the list or enter it in the search box.

 A dropdown menu showing "Handler Carol Nolan" with a down arrow, and a checked checkbox labeled "Outstanding Only".

<input type="text"/>		Show Stats
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	

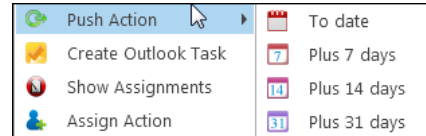
3. The Show Stats box details the tasks outstanding by each user.

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.

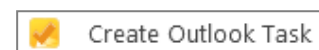
### How to Push a Task

- 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 an Outlook Task

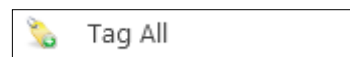
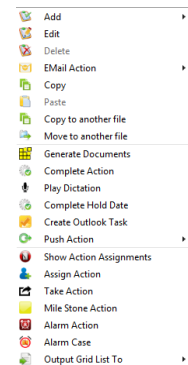
- Right click** on a task and select **Create Outlook Task** from the pop-up menu.
- A task will be created in your **Outlook** task list which you may edit as required.



### 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**.



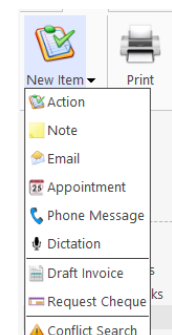
**Tip:** To UnTag right click and click on **UnTag All**,



- 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.

Change Action ( 3122 )

Action

Generate Document Post Time Note High Take Action Generate Save

Open Attachment Complete Email Normal Assign Action

Play Dictation Print Email (Template) Low

Default Actions Priority Assignment SDLT

General Properties Attachment/Documents Action Assignments Other Notes

Case HAR001/0001 RTA @ Dundrum Roundabout

Action Code G07 Letter to Barrister ?

Date 21 Sep 2016 Due Date 30 Sep 2016

Subject Letter to Barrister re Opinion

General Email Appointment Phone Message

FE/Handler Carol Nolan

Team Commercial

Letter to Barrister re Opinion

Ok Cancel

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

**NOTE:** When the Due Date is later than the Date, pushing out the action to a date prior to the Due Date will not change the Due Date. However, if the action is pushed out to a date later than the current Due Date, a message will ask if you want the Due Date to match the new date entered.

## 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

Release Action ☐ Ok Cancel

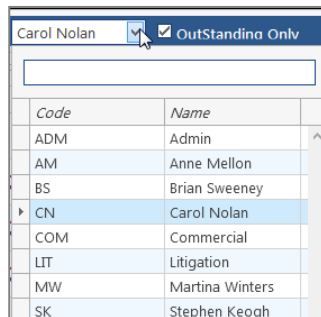
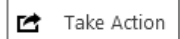
Only the owner of the task can change the Due Date on a delegated task.

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

#### 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:

**View Report**

DOC PDF XLS

Type the text to find

**Soo Grabbit & Runne**

**Handler Diary**

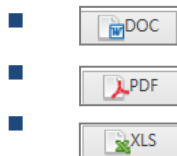
**Carol Nolan**

Data Date : 09/11/2014 : 15:43  
From Date: 02/03/2001 To Date: 09/11/2014  
Status: Outstanding  
Action Type: All

Matter Action Id	Date Time	Client Name Description	From Status	Diary Code Item Type	Diary Description
<b>High Priority</b>					
FIT002/0001 1903	19/12/2013 14:53:57	Melinda FitzGerald Sale of lands in wicklow	CN NA	G16 Action	Review File
Not Applicable					
KEL002/0001 1865	26/12/2013 12:04:37	Sarah Kelly Purchase of Property	CN NA	G16 Action	Review File
Not Applicable					
KEL002/0001 1861	07/05/2014 11:49:29	Sarah Kelly Purchase of Property	CN NA	G16 Action	Review File
Not Applicable					
BLA001/0001 1817	28/05/2014 08:36:03	Gordon T. Black RTA Walkinstown Crossroads, G. Black	CN NA	G16 Action	Review all contracts
Not Applicable					
BLA001/0001 1837	04/06/2014 17:12:35	Gordon T. Black RTA Walkinstown Crossroads, G. Black	CN NA	G16 Action	incoming copies doc
Not Applicable					
AAA001/0001 1932	27/10/2014 16:08:00	AAA Securities Ltd Landlord Dispute	CN NA	ADMSD Statute Date	Statute of Limitations Date =06 Nov 2014
Not Applicable					
BIL001/0001 1931	01/11/2014 11:49:41	Noel Billing RTA Brennanstown Valley Roundabout	CN NA	ADMUD Undertaking	Undertaking Created: Date: 01 Nov 2014 Type: Financial Given Authorised By: AM Anne Mellon
Not Applicable					
BLA001/0002 1961	04/11/2014 18:15:00	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Dublin 6	CN NA	G16 Action	Review File
Not Applicable					
BLA001/0002 1962	04/11/2014 18:18:39	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Dublin 6	CN NA	G16 Action	Review File
Not Applicable					

Page 1 of 4 | Main Report

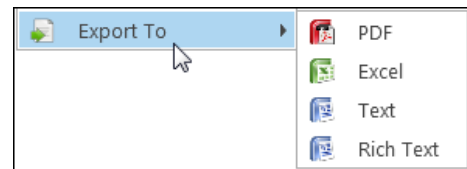
100%



Word;  
Adobe; or  
Excel.

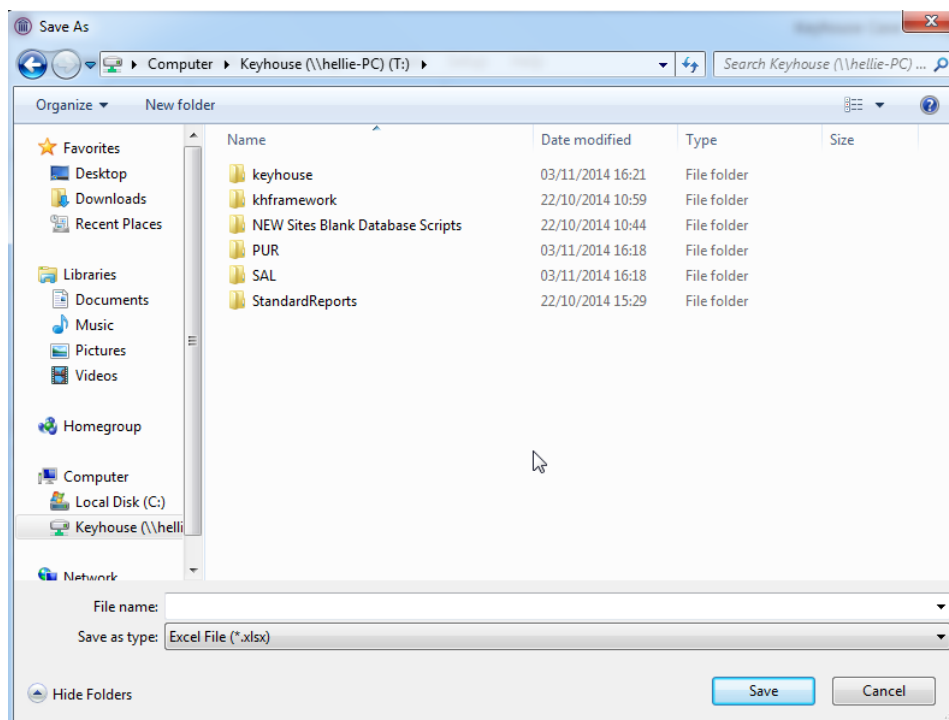
## How to Export a copy of your task list

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 several 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

The screenshot shows the Keyhouse Case Management interface. The main window displays the 'Know Your Client' screen for client 'David Abrahams' (Case: ABA001/0001). The 'General' tab is selected, showing client details and a list of categories. An 'Insert Contact Category' dialog box is open, allowing the user to add a new category. The dialog box contains fields for 'Client Name' (David Abrahams), 'Date' (Please select date), 'Category Type' (Select category type), and 'Category' (Select category type). Below these fields is an 'Extra Information' section with a table for additional details. The background screen shows a list of categories with columns for 'Category Type Description' and 'Category Description'. The 'Insert' button is visible at the bottom right of the main window.

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.

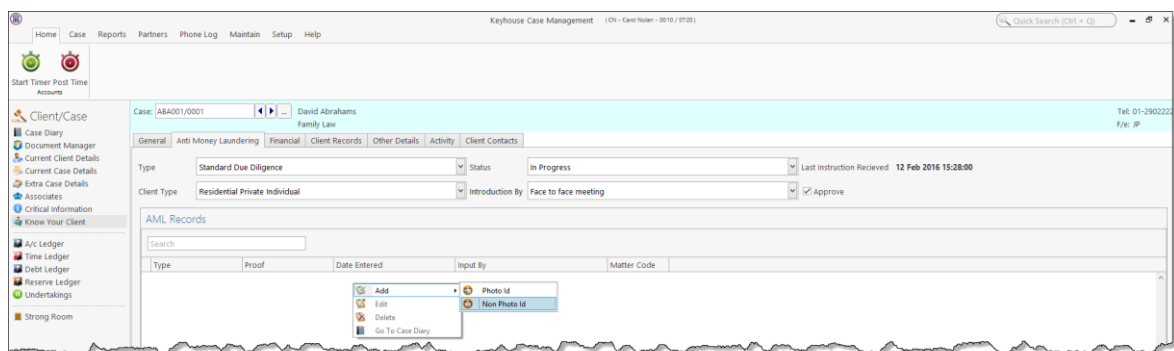
- Type:** The type of AML carried out e.g. Standard Due Diligence, Enhanced Due Diligence etc.  
**Client Type:** Relates to the client category e.g. Corporate, Charity, Public Sector etc.  
**Status:** Records where all checks are complete or are still in progress  
**Introduced By:** Records how the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

These categories are in line with Law Society Guidelines.

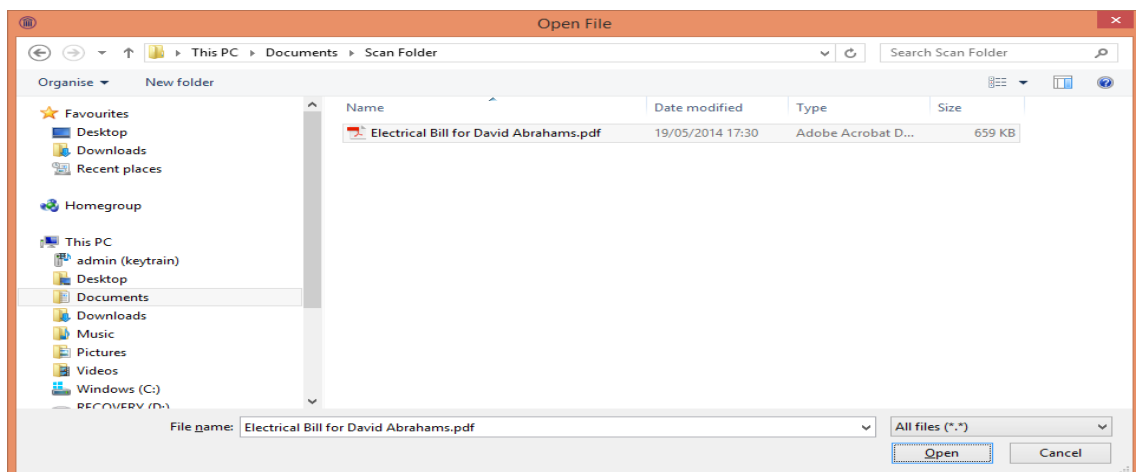
Click on the down arrow beside each option to select the required information.

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 screenshot shows the 'Know Your Client' section of the Keyhouse Case Management software. The 'ID Code' dropdown menu is open, displaying a list of ID types. The selected option is 'Gibb card accompanied by letter from Office...'. The list includes:

- Gibb card accompanied by letter from Office...
- Identification form with photo signed by a...
- International Passport
- Irish Passport
- National Identity Card
- Photo card driving license
- Social Welfare card with photo ID
- Bank statements, or credit/debit card state...
- Documentation/cards issued by the Depart...
- Documentation/cards issued by the Revenue...

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

The screenshot shows the 'Know Your Client' section of the Keyhouse Case Management software. The 'ID Code' dropdown menu is now closed, and the 'Non Photo ID' entry is visible in the 'AML Records' table. The table shows the following data:

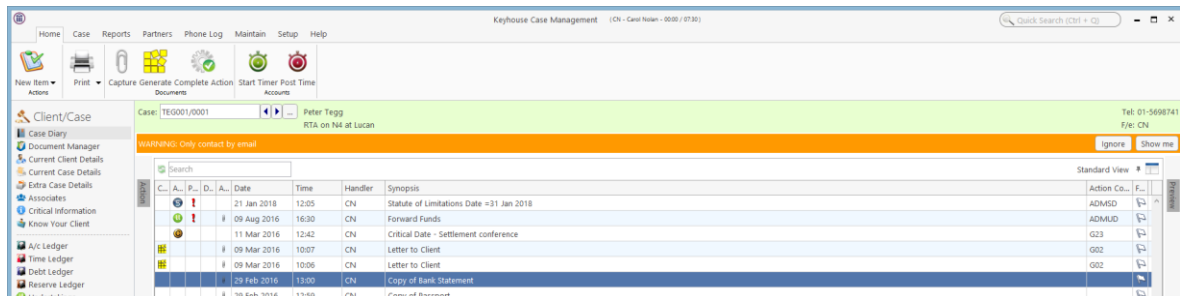
Type	Proof	Date Entered	Input By	Matter Code
Non Photo ID	Utility bills (including L...	23 May 2016	CN	ABA001/0001

The screenshot shows the 'Case Diary' section of the Keyhouse Case Management software. The 'Case Diary' table displays a list of actions. The table has columns for C., A., P., D., A., Date, Time, Handler, Synopsis, and Action Co. The actions listed include:

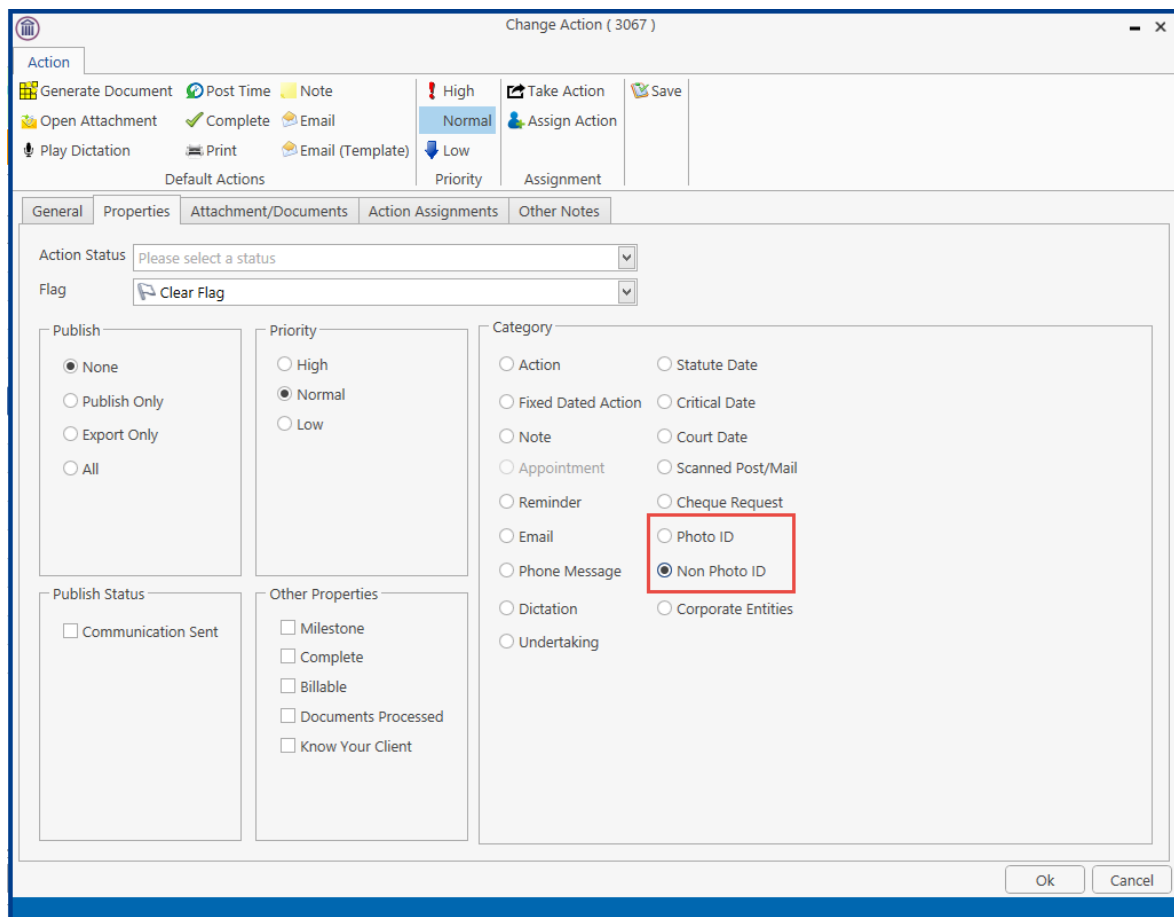
- Draft Bill Draft Bill No: 274
- Letter to Solicitor re Pleading
- Undertaking To AS Longford
- Entity info (company) note printed from the internet
- Remind Lender to send Title
- Invoice No:230
- Letter from Accountant
- Invoice No:229
- Email From:brian@keyhouse.ie - Practice Management Review Agenda
- Email To: Financial Trends for the Economy
- David Abrahams
- Email Tobrian@keyhousedemo.ie - Sample Report for Key Performance Indicators
- Letter to Solicitor re title Letter to Alltop & Browne
- Accountants Letter
- Brian
- Email To: Copy Land Folio
- David
- Innovation Ad

## 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.

Keyhouse Case Management (CN - Carol Nolan - 0000 / 0700)

Home Case Reports Partners Phone Log Maintain Setup Help

Start Timer Post Time Accounts

Client/Case

Case: TEG001/0001 Peter Tegg RTA on N4 at Lucan Tel: 01-5698741 F/r: CN

General Anti Money Laundering Financial Client Records Other Details Activity Client Contacts

Type: Standard Due Diligence Status: In Progress

Client Type: Residential Private Individual Introduction By: Face to face meeting ☒ Approve

AML Records

Type	Proof	Date Entered	Input By	Matter Code
Non Photo ID	Copy of Bank Statement	29 Feb 2016	CN	TEG001/0001

## 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. 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.

Change Action (2374)

Action: Generate Document, Post Time, Note, High, Take Action, Save, Normal, Assign Action, Low, Priority, Assignment

General Properties Attachment/Documents Action Assignments Other Notes

Action Status: NA Not Applicable

Flag: Clear Flag

Publish: ☒ None, ☐ Publish Only, ☐ Export Only, ☐ All

Publish Status: ☐ Communication Sent

Priority: ☐ High, ☒ Normal, ☐ Low

Other Properties: ☐ Milestone, ☒ Complete, ☐ Billable, ☐ Documents Processed, ☒ Know Your Client

Category: ☐ Action, ☐ Fixed Dated Action, ☐ Note, ☐ Appointment, ☐ Reminder, ☐ Email, ☒ Phone Message, ☐ Dictation, ☐ Undertaking, ☐ Statute Date, ☐ Court Date, ☐ Scanned Post/Mail, ☐ Cheque Request, ☐ Photo ID, ☐ Non Photo ID

OK Cancel

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

Keyhouse Case Management (CN - Carol Nolan - 0000 / 0700)

Home Case Reports Phone Log Maintain Setup Help

Start Timer Post Time Accounts

Client/Case

Case: ABAD01/0001 David Abrahams Tel: 01-2902222 F/r: CN

General Anti Money Laundering Financial Client Records Other Details Activity

Search

Other Documents	Matter	Date Entered	Fe	Handler
Call from: David Abrahams Phone No: +253-87-8768108...	0001	27 Feb 2014	CN	BS

Standard View

## 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.

Case: FLY001/0001 Jack Flynn  
Sale of 10 Rose Lawn, Blanchardstown, Dublin 17

General Anti Money Laundering Financial Client Records Other Details Activity Client Contacts

Form Credit Check

Enter the Client's Credit Rating

Enter the Risk

## 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.

Keyhouse Case Management (CH - Carol Nolan - 0001 / 0728)

Case: BOBUS/0002 Bing Oil Industries Business Banking  
Advice re Agreement

General Anti Money Laundering Financial Client Records Other Details Activity Client Contacts

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...					

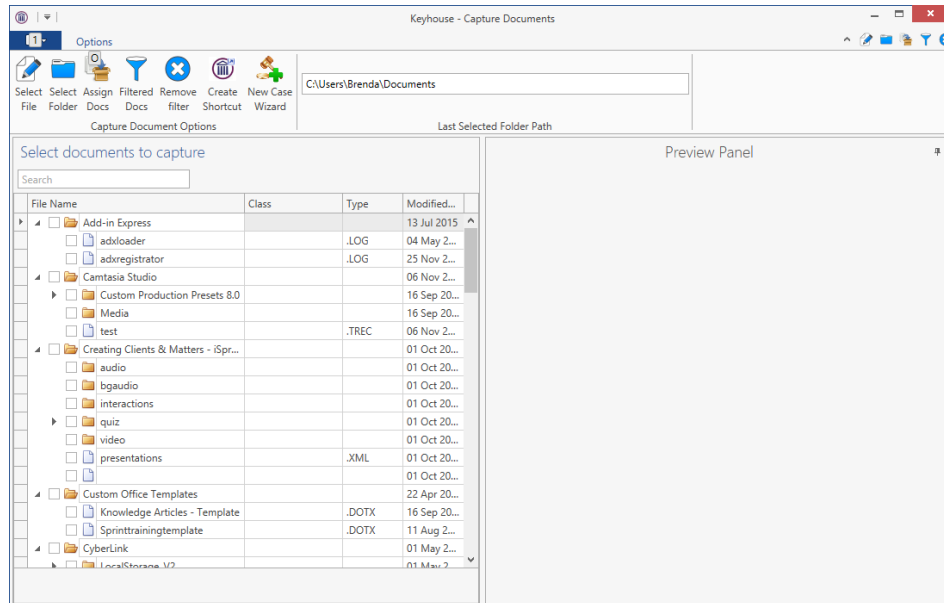
Insert Change Delete


CH: Carol Nolan | Monday, 15 February 2016 | 15:02

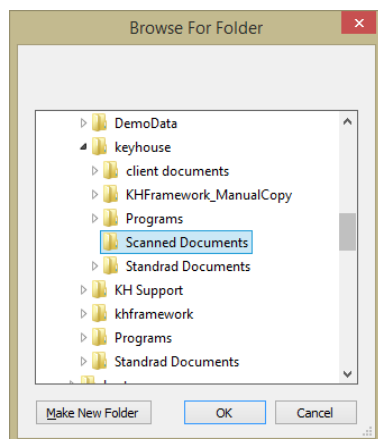
## Chapter 8: Keyhouse Capture

### How to Capture a Folder

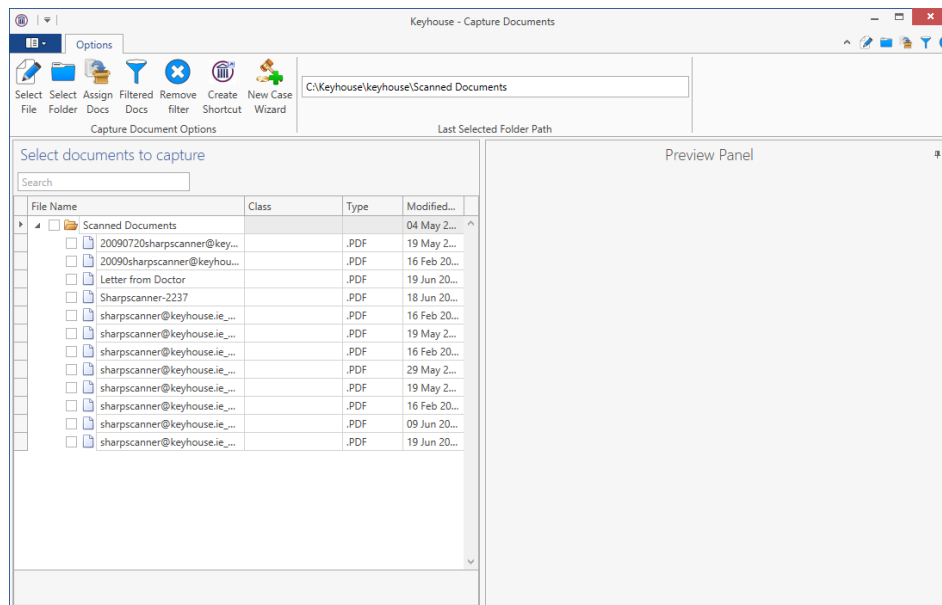
1. Click **Capture** button on the Home tab in either the Case Diary or Task List. The following screen will appear.



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: | \ / < > ; , \*



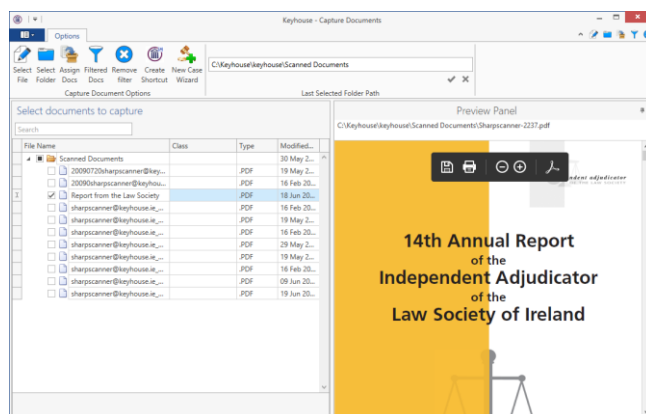
**Tip:**

**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.

Assign checked documents to Case/Matter

Case/Matter: BLA001/0002

Handler: Admin

Action Code:

Document Class: Please select a document class

Assign Date: Please select a date [OR] ☒ Use file date

Diary Description:

Note: Leave description blank to use document name as the description

Capture settings:

- ☐ Remove captured documents from original location
- ☐ Import documents to a single action
- ☐ Set captured document as complete
- ☐ Set action as generated

Save Settings Ok Cancel

- 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.

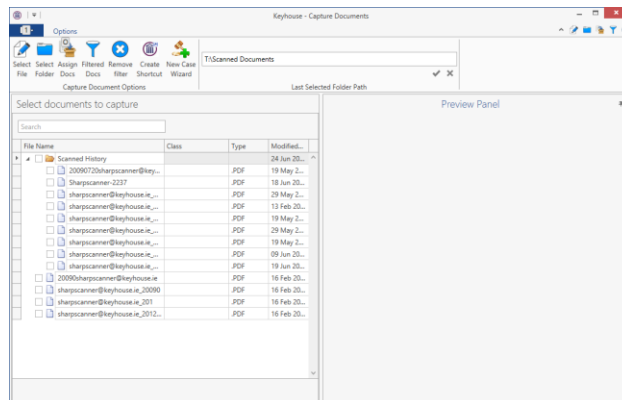


**Tip:** Click **Save Settings** to keep these settings for future documents captured.

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

## How to Capture a File

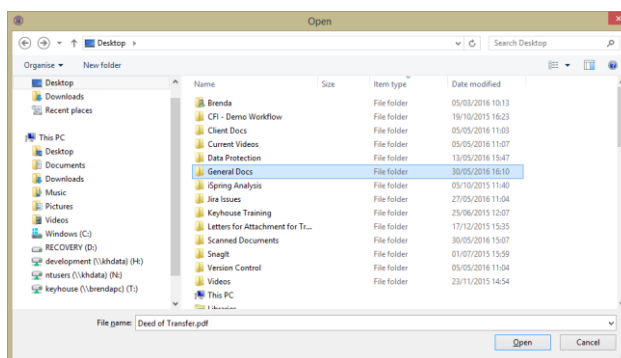
1. Click **Capture** on the Home tab in either the Case Diary or Task List. The following screen will appear.



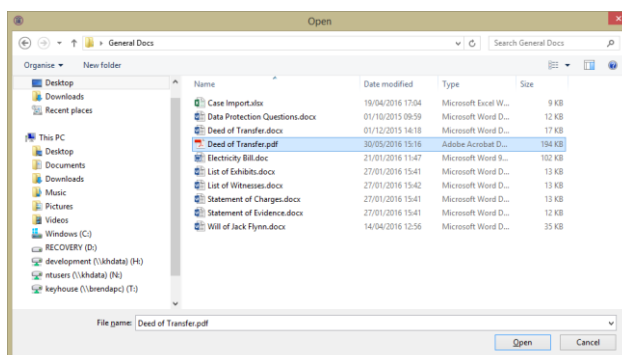
2. Click **Select File**.



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

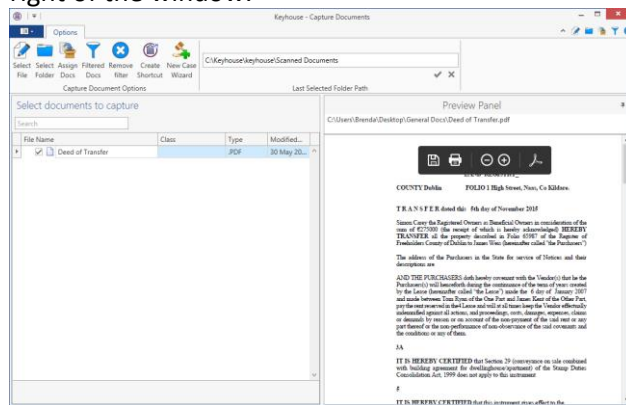


4. Click on the file and click on the Open button. The chosen document will be listed on the left-hand side of the **Capture Documents** window.






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.

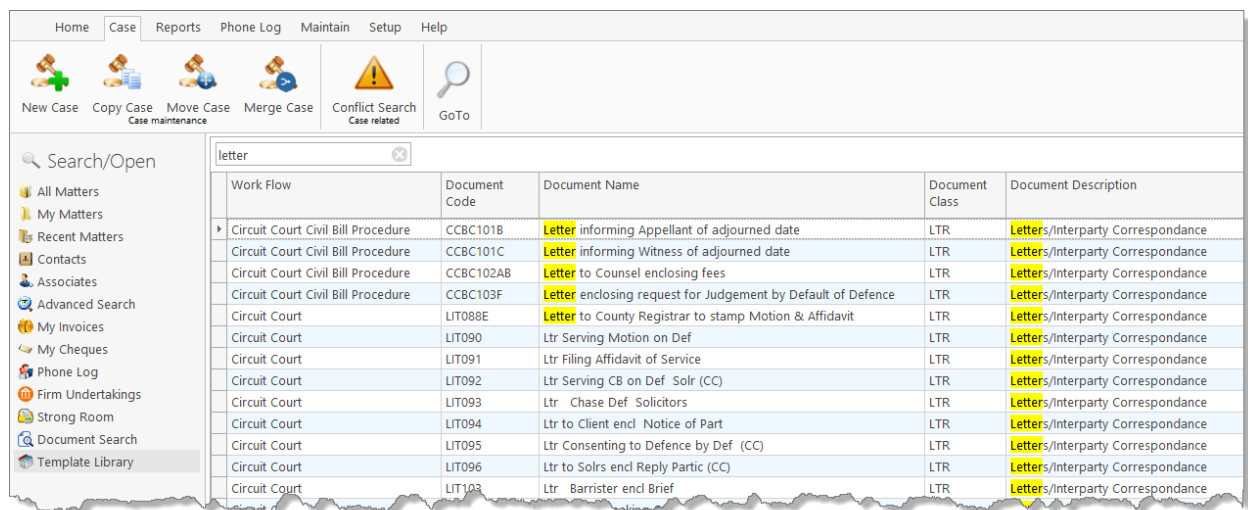
8. When finished click **OK**.
9. The files will appear in the case diary as a single action or multiple actions, depending on the options chosen.

## 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

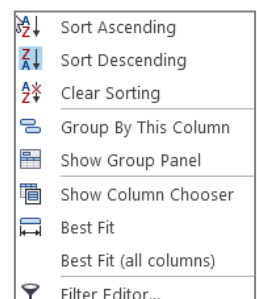
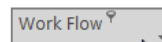
1. Click on **Search/Open**.
2. Click on **Template Library** the following screen will appear.



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.

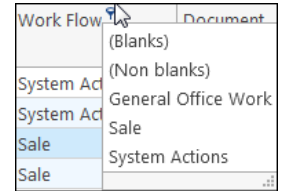
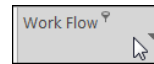
### How to sort Column Headings in the Template Library

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.



## How to apply a filter

1. 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.



2. Click on the **filter** required.
3. 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).



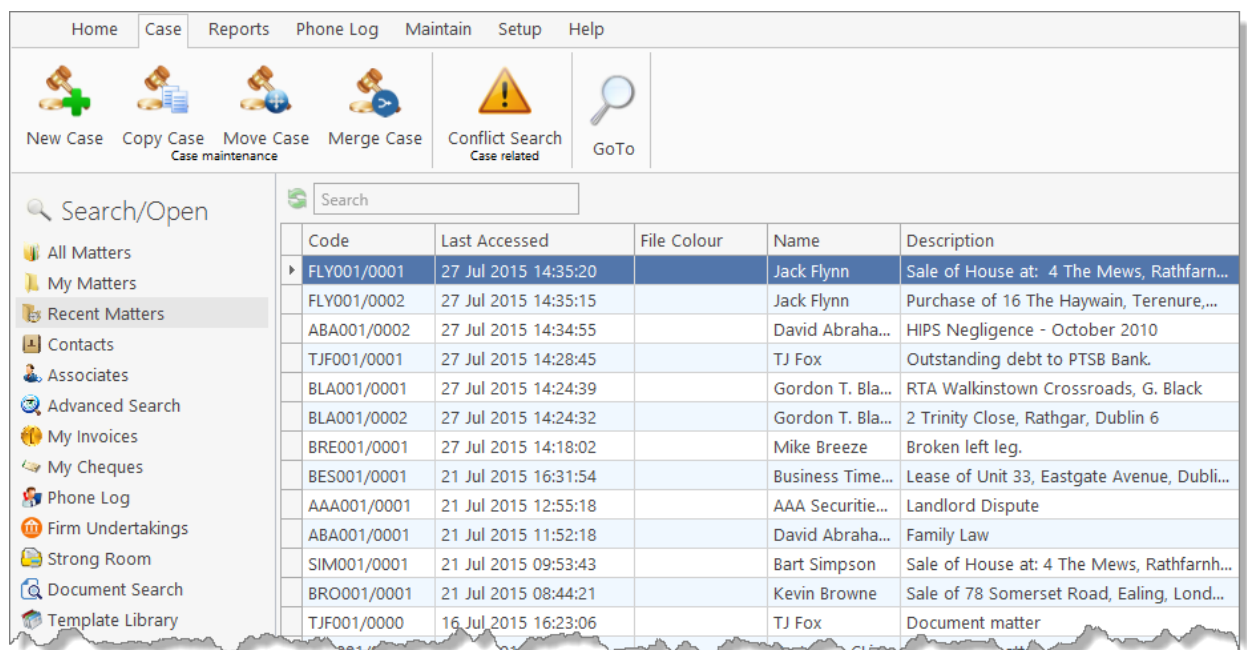
## Chapter 10: Conflict Search

### 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

1. 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.

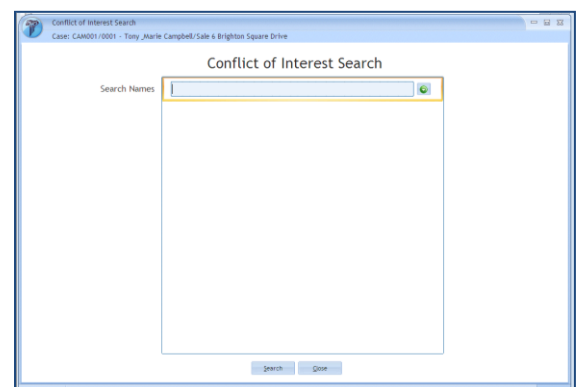



2. Click on **Conflict Search** icon on the Case tab.
3. A Conflict of Interest Search window will appear.
4. The types of information you can search for are the Name, PPS number, telephone number or address.
  - a. Click in the search box, **input** the first search criteria e.g. Stephen Keogh

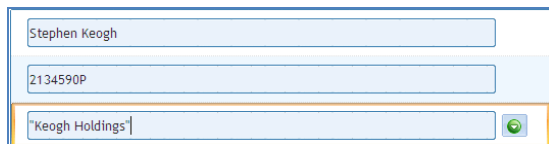
Stephen Keogh

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

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

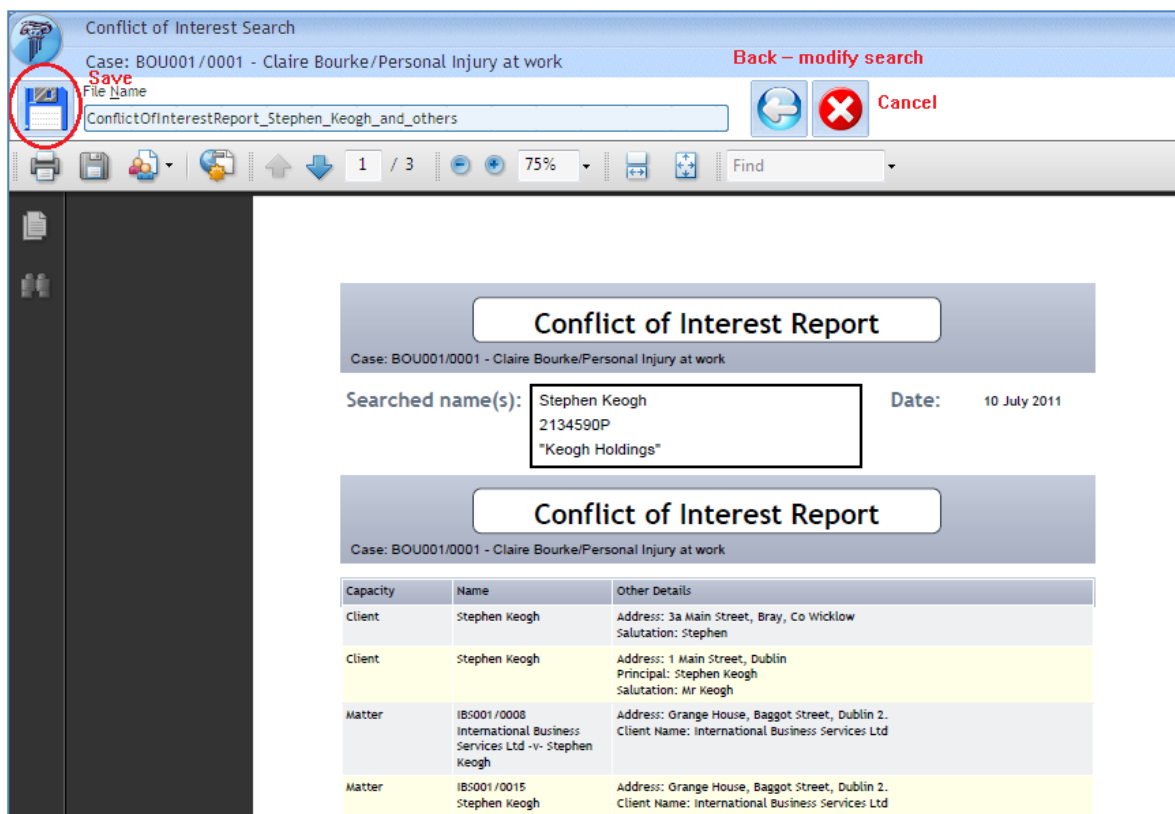


- b. To add a second criteria, click on the **down arrow**  Input the second search criteria. Repeat this process for a 3<sup>rd</sup>, 4<sup>th</sup> etc. See the following example



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


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

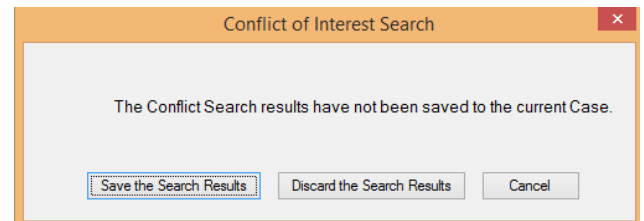
See the following example.

					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

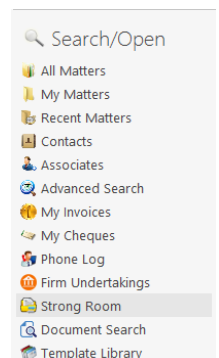
### What is the Strong Room used for?

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	TJF001/0001	DEE	TJ Fox/Outstanding debt to PT58 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.

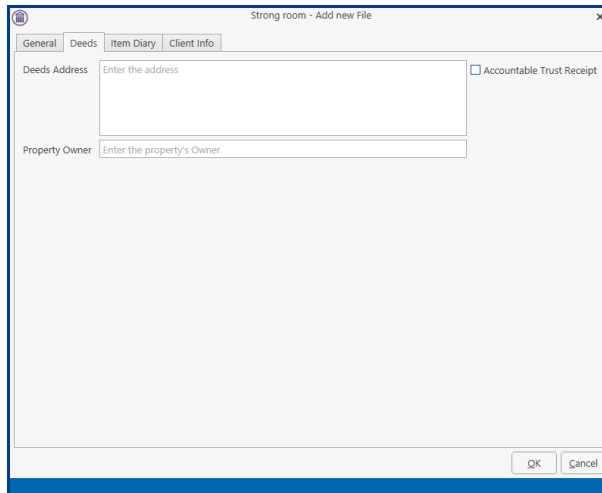
**Open/Closed:** This will **default** to open.

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.

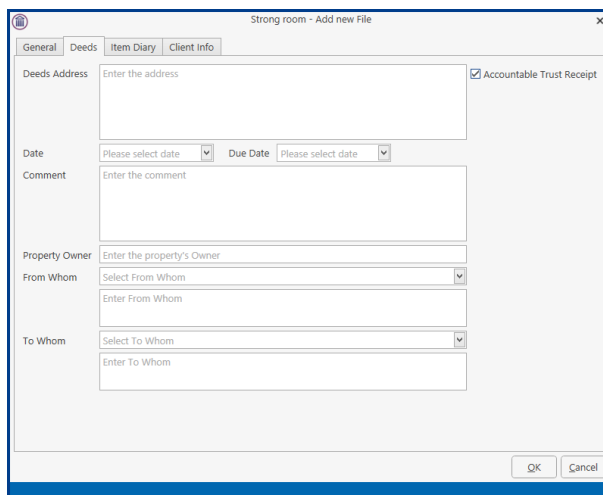
## Entering Deeds in the Strong Room

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



The screenshot shows the 'Strong room - Add new File' dialog box with the 'Deeds' tab selected. The 'Deeds Address' field is active, with a 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 a 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.



This screenshot shows the same dialog box but with more fields visible. The 'Deeds Address' field is still active. The 'Accountable Trust Receipt' checkbox is now checked. Below the address field, there are two date pickers labeled 'Date' and 'Due Date', both with the placeholder text 'Please select date'. Below these is a 'Comment' field with a placeholder text 'Enter the comment'. Below the comment field is the 'Property Owner' field with a placeholder text 'Enter the property's Owner'. Below the property owner field are two dropdown menus labeled 'From Whom' and 'To Whom', both with the placeholder text 'Select From Whom' and 'Select To Whom' respectively. Below each dropdown menu is a text input field with a placeholder text 'Enter From Whom' and 'Enter To Whom' respectively. 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.

The screenshot shows a dialog box titled "Strong room - Add new File" with a close button (X) in the top right corner. It has four tabs: "General", "Wills", "Item Diary", and "Client Info". The "Wills" tab is selected. The form contains the following fields:

- Testator:** A text box labeled "Enter the testator" and a larger text box labeled "Enter the testator address".
- Will Date:** A dropdown menu with the text "Please select date".
- Est Estate:** A text box containing "0.00".
- Date of death:** A dropdown menu with the text "Please select date".
- Executor 1:** A text box labeled "Enter the executor 1" and a larger text box labeled "Enter the executor 1 address".
- Executor 2:** A text box labeled "Enter the executor 2" and a larger text box labeled "Enter the executor 2 address".
- Executor 3:** A text box labeled "Enter the executor 3" and a larger text box labeled "Enter the executor 3 address".
- Executor 4:** A text box labeled "Enter the executor 4" and a larger text box labeled "Enter the executor 4 address".

At the bottom right, there are "OK" and "Cancel" buttons.

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.

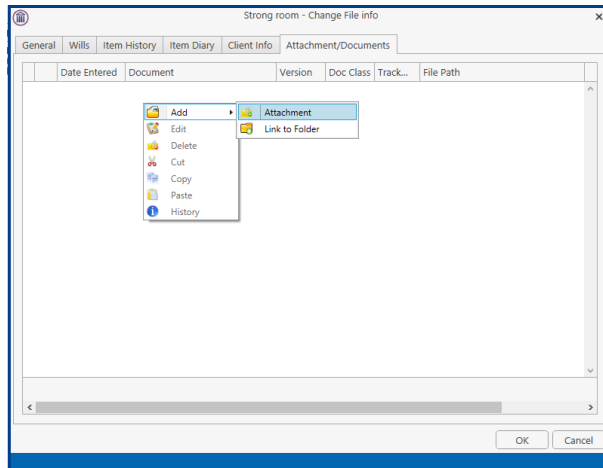
## Attach a Document to a Strong Room Entry

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.

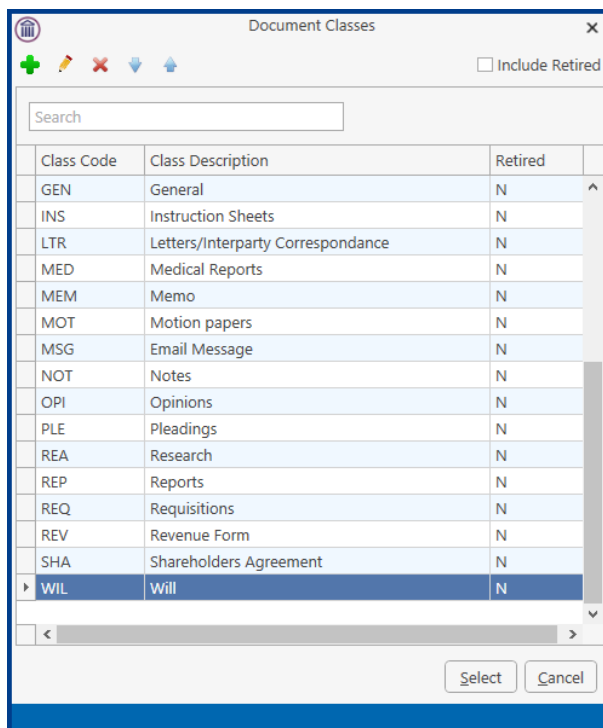
The screenshot shows a dialog box titled "Strong room - Change File info" with a close button (X) in the top right corner. It has five tabs: "General", "Wills", "Item History", "Item Diary", "Client Info", and "Attachment/Documents". The "Attachment/Documents" tab is selected. The form contains a table with the following columns: "Date Entered", "Document", "Version", "Doc Class", "Track...", and "File Path". The table is currently empty. At the bottom right, there are "OK" and "Cancel" buttons.

5. Right click and select **Add** and then select **Attachment**



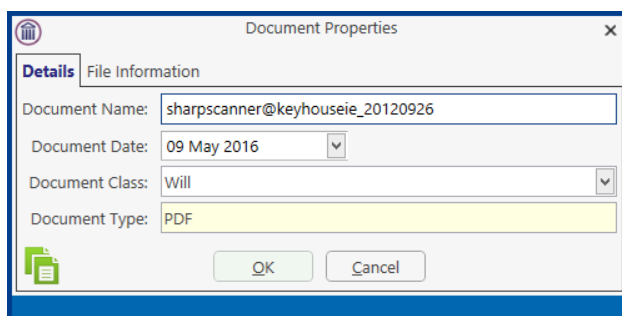
6. **Navigate** to the file location e.g. Scan Folder and select the document.

7. Click **Open**. The following dialog box will appear.

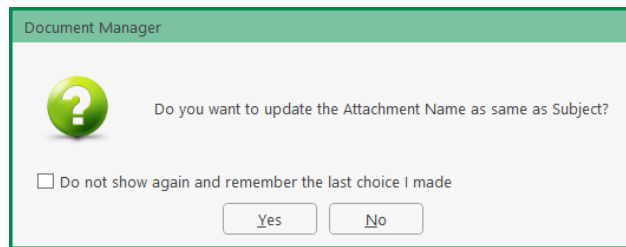


8. Select the appropriate **Document Class** and click Select.

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.

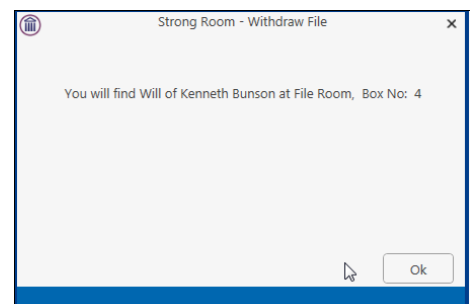
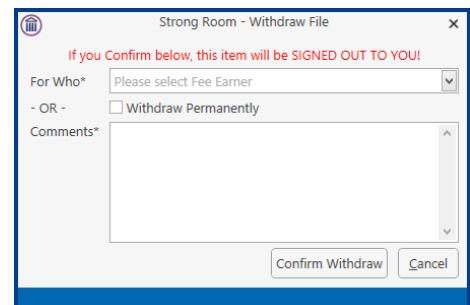
 **Note** if you tick the Withdraw Permanently it will not be possible to replace the document. A new entry will need to be created.

### 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**.

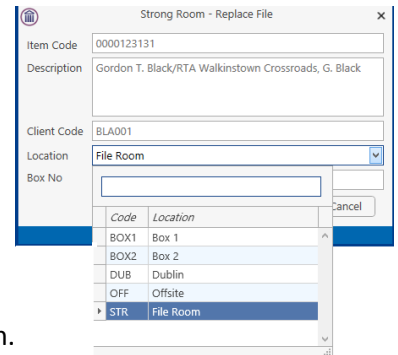


## How to Replace/Return an Item

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**.



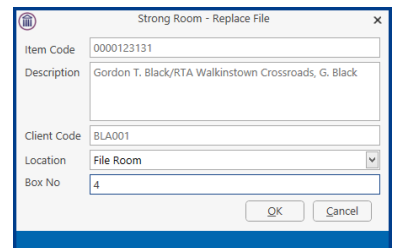
Strong Room - Replace File

Item Code: 0000123131  
 Description: Gordon T. Black/RTA Walkinstown Crossroads, G. Black

Client Code: BLA001  
 Location: File Room  
 Box No: [ ]

Code Location  
 BOX1 Box 1  
 BOX2 Box 2  
 DUB Dublin  
 OFF Offsite  
 STR File Room

Cancel

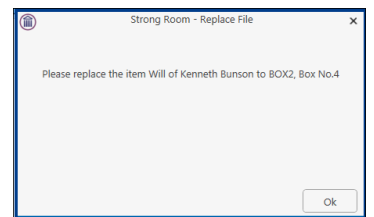


Strong Room - Replace File

Item Code: 0000123131  
 Description: Gordon T. Black/RTA Walkinstown Crossroads, G. Black

Client Code: BLA001  
 Location: File Room  
 Box No: 4

OK Cancel



Strong Room - Replace File

Please replace the item Will of Kenneth Bunson to BOX2, Box No.4

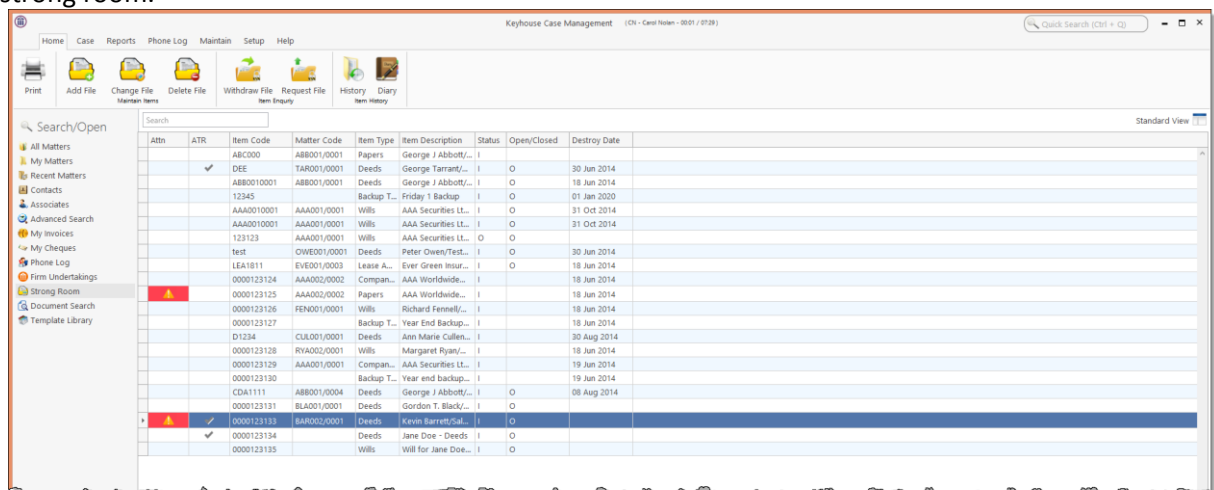
Ok

## 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
		ABB001/0001	ABB001/0001	Deeds	George J Abbott/...	I	O	18 Jun 2014
		12345	AAA001/0001	Backup T...	Friday T Backup	I	O	01 Jan 2020
		AAA001/0001	AAA001/0001	Wills	AAA Securities Lt...	I	O	31 Oct 2014
		AAA001/0001	AAA001/0001	Wills	AAA Securities Lt...	I	O	31 Oct 2014
		123123	AAA001/0001	Wills	AAA Securities Lt...	O	O	
		test	OIVE001/0001	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	CLB001/0001	Deeds	Jam Marie Cullen...	I	O	30 Aug 2014
		0000123128	RYA001/0001	Wills	Margaret Ryan/...	I	O	18 Jun 2014
		0000123129	AAA001/0001	Compan...	AAA Securities Lt...	I	O	19 Jun 2014
		0000123130		Backup T...	Year end backup...	I	O	19 Jun 2014
		CD41111	ABB001/0004	Deeds	George J Abbott/...	I	O	08 Aug 2014
		0000123131	BLA001/0001	Deeds	Gordon T. Black/...	I	O	
		0000123132	SAP002/0001	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. 179).

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

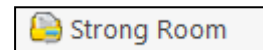
By Who	For Who	Out Date	Out Time	In Date	In Time	Comment	Item Code
Brian Sweeney	Brian Sweeney	18 Jun 2014	17:05:06	18 Jun 2014	17:09:50	Work on the file	0000123125
Brian Sweeney	Martina Wint...	18 Jun 2014	17:07:06	18 Jun 2014	17:09:50	Working on the file	0000123125
Brian Sweeney	Brian Sweeney	18 Jun 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 - 8021 / 0738)

Home Case Reports Phone Log Maintain Setup Help

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

Search/Open

Search

Standard View

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 Jan 2020
		12345		Backup T...	Friday 1 Backup	I	O	31 Oct 2014
		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/Test...	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		18 Jun 2014
		0000123125	AAA002/0002	Papers	AAA Worldwide...	I		18 Jun 2014
		0000123126	FEN001/0001	Wills	Richard Fennell/...	I		18 Jun 2014
		0000123127		Backup T...	Year End Backup...	I		18 Jun 2014
		D1234	CUL001/0001	Deeds	Ann Marie Cullen...	I		30 Aug 2014
		0000123128	RYA002/0001	Wills	Margaret Ryan/...	I		18 Jun 2014
		0000123129	AAA001/0001	Compan...	AAA Securities Lt...	I		19 Jun 2014
		0000123130		Backup T...	Year end backup...	I		19 Jun 2014
		CDA1111	ABB001/0004	Deeds	George J Abbott/...	I	O	08 Aug 2014
		0000123131	BLA001/0001	Deeds	Gordon T. Black/...	I	O	
		0000123133	BAR002/0001	Deeds	Kevin Barrett/Lat...	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. 116). However, you will not be able to add a Client/Matter details.

Strong room - Add new File

General Deeds Item Diary Client Info

Item Type \* **Deeds** Item Code \*

Client Code  Matter Code

Client Name  Description

Description \*

Location  Box No

Search Code  Fee Earner

Entry & Destroy Date

Entry Date  Destroy Date

☒ Open ☐ Closed

OK Cancel

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	FEN001/0001	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 is in or out the Strong Room.

**NOTE:** The process for withdrawing (p. 120) and Viewing the History of a document (p. 121) 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

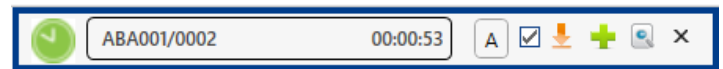
Both tools can be found on the Home tab.

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.

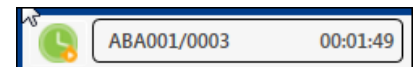
## How to Record Time Using the Timer

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. 

FLY001/0002		00:17:02		<div> <div>A</div> <div>✓</div> <div>↑</div> <div>+</div> <div>🔍</div> <div>✕</div> </div>			
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.

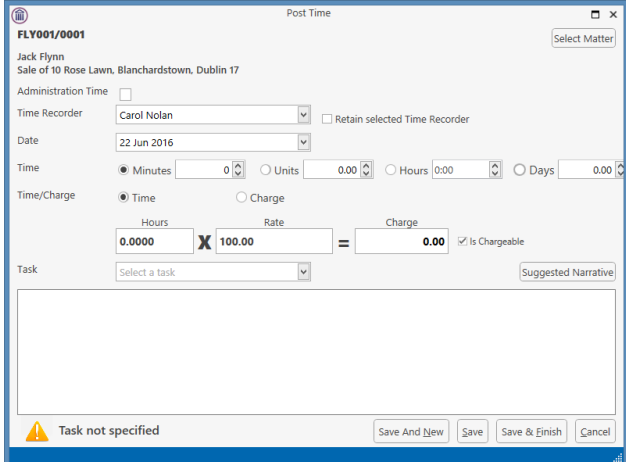
**Chargeable:** Check the box if this time is chargeable or uncheck it if it is not. This can be set as a default setting by the System Administrator.

**Task:**

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

**Comment:**

Input a narrative to describe the time entry

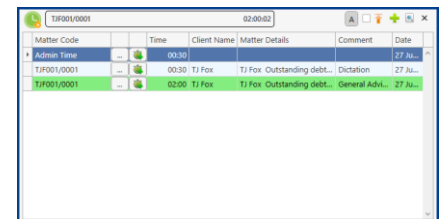
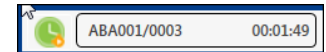
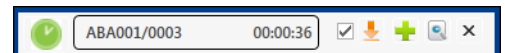


4. Click on **Save** to save the changes **or** click on **Save and Finish** to remove the entry from the list of timers.

 **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.



**FLY001/0001**  
Jack Flynn  
Sale of 10 Rose Lawn, Blanchardstown, Dublin 17

Administration Time ☐

Time Recorder: Carol Nolan ☐ Retain selected Time Recorder

Date: 22 Jun 2016

Time: ☐ Minutes 0 ☐ Units 0.00 ☐ Hours 0:00 ☐ Days 0.00

Time/Charge: ☒ Time ☐ Charge

Hours: 0.0000 X Rate: 100.00 = Charge: 0.00 ☒ Is Chargeable

Task: Select a task

Suggested Narrative

Task not specified

Save And New Save Save & Finish Cancel

**FLY001/0001**  
Jack Flynn  
Sale of 10 Rose Lawn, Blanchardstown, Dublin 17

Administration Time ☒

Non Chargeable Code: Select non chargeable code

Time Recorder: Carol Nolan ☐ Retain selected Time Recorder

Date: 22 Jun 2016

Time: ☒ Minutes 0 ☐ Units 0.00 ☐ Hours 0:00 ☐ Days 0.00

Time/Charge: ☒ Time ☐ Charge

Hours: 0.0000 X Rate: 100.00 = Charge: 0.00 ☒ Is Chargeable

Task: Select a task

Suggested Narrative

Task not specified

Save And New Save Save & Finish Cancel

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

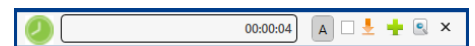
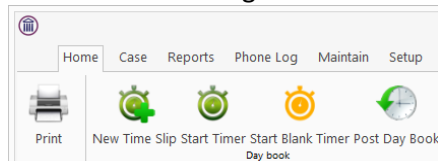
- Click on **Save and Finish**. This time entry is then transferred to the daybook ready for posting to time ledger.

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


## How to create an Empty Timer

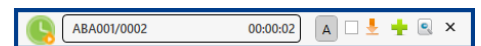
At certain times, you may want to start recording without first selecting a case. It is possible to create an empty timer which can later be allocated to a particular case.

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

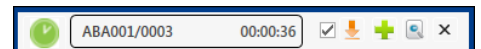


- To pause the timer, click on the clock.

 **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. 129 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 based on 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

**Post Time**

**FLY001/0001**

Jack Flynn  
Sale of 10 Rose Lawn, Blanchardstown, Dublin 17

Administration Time ☐

Time Recorder: Carol Nolan ☐ Retain selected Time Recorder

Date: 22 Jun 2016

Time: ☐ Minutes 0 ☐ Units 0.00 ☒ Hours 0:00 ☐ Days 0.00

Time/Charge: ☒ Time ☐ Charge

Hours: 0.0000 X Rate: 100.00 = Charge: 0.00 ☒ Is Chargeable

Task: Select a task

Suggested Narrative

Task not specified

Save And New Save Save & Finish Cancel

- 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

4. 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

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

The screenshot shows the 'Post Time' window. The 'Administration Time' checkbox is checked and circled in red. Below it is a 'Non Chargeable Code' dropdown menu. The 'Time Recorder' is set to 'Carol Nolan' with a 'Retain selected Time Recorder' checkbox. The 'Date' is set to '22 Jun 2016'. The 'Time' section has radio buttons for 'Minutes', 'Units', 'Hours' (selected), and 'Days'. Below these are input fields for '0', '0.00', '0:00', and '0.00'. A 'Suggested Narrative' text area is at the bottom. A warning icon and 'Task not specified' message are at the bottom left. Buttons for 'Save And New', 'Save', 'Save & Finish', and 'Cancel' are at the bottom right.

4. Add the following details:


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

**Minutes/Hours/Days:** Input the number 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.

Home

Case

Reports

Phone Log

Maintain

Setup

Help

Print

New Time Slip

Start Timer

Start Blank Timer

Post Day Book

Day book

Time Costing

My Day Book

Time Report

My WIP by Bill Date

My Top WIP

Dashboard

Tasks

Search/Open

Client/Case

Time Coding

Day Book Summary

Chargeable 09:06 Non-Chargeable 00:00 Total 09:06 Remaining 00:00

Handler Carol Nolan

Date	Matter Code	Client Name	Matter Details	Comment	Case Time	Charge
27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox: Outstanding debt to PTSS Bank.	Demand & Draft Proceedings.	00:01	2.50
27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox: Outstanding debt to PTSS Bank.	General Advice	00:30	75.00
27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox: Outstanding debt to PTSS Bank.	Court Attendance	01:00	150.00
27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox: Outstanding debt to PTSS Bank.	Dictation	00:30	75.00
27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox: Outstanding debt to PTSS 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

Keyhouse Case Management

ICN - Carol Nolan - 09:06 / 09:00

Quick Search (Ctrl + Q)

ICN: Carol Nolan | Friday, 31 July 2015 | 15:54

## 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. 129 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. 129 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

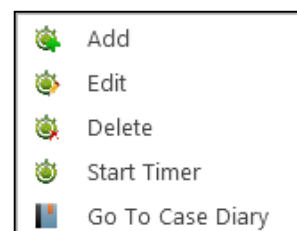
1. Click on **New Time Slip** on the Home tab in **My Day Book**. The Post Time dialogue box will appear.
2. Check the Administration Time box. The screen will change to display the options for Administration time (see How to create an Admin Time slip, p. 130 above).
3. Complete the details of Date, Time, Non-Chargeable Code and Comment as above, How to create an Admin Time slip, (p. 130).
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 Aug 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	62.50	0.00	0	General Advice	Danahan, Kianoh.

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



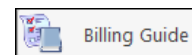
**NOTE:** The current balances on the matter are displayed on the right of the screen.

- 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 Earning'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 : 87466750D					
			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 FLY001/0002	YourRef 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 (Date/Time)					
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

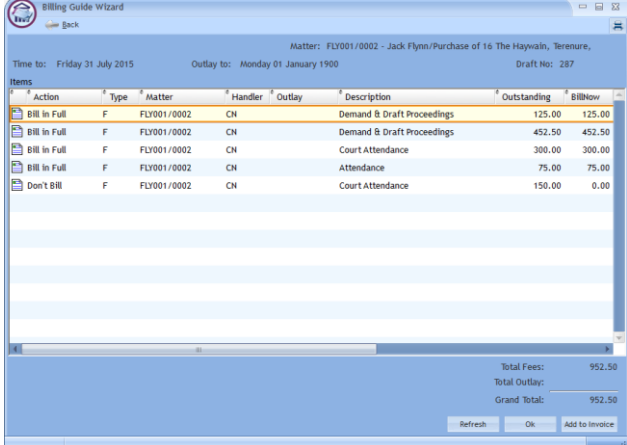
- Click the item to be excluded.

 **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



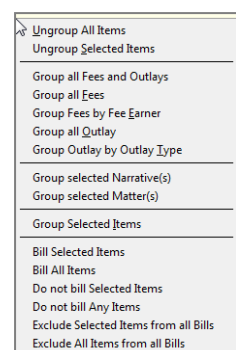
Action	Type	Matter	Handler	Outlay	Description	Outstanding	Bill Now
Bill In Full	F	FLY001/0002	CN		Demand & Draft Proceedings	125.00	125.00
Bill In Full	F	FLY001/0002	CN		Demand & Draft Proceedings	452.50	452.50
Bill In Full	F	FLY001/0002	CN		Court Attendance	300.00	300.00
Bill In Full	F	FLY001/0002	CN		Attendance	75.00	75.00
Don't Bill	F	FLY001/0002	CN		Court Attendance	150.00	0.00

Total Fees: 952.50  
Total Outlay: 952.50  
Grand Total: 952.50



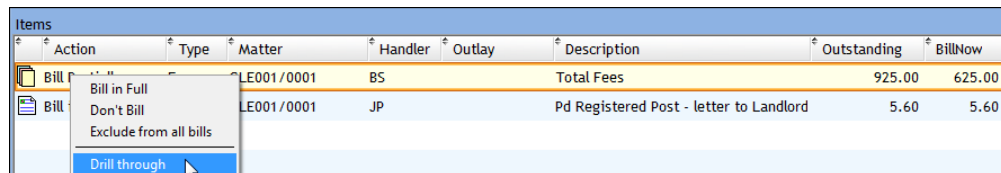
Action	Type	Matter	Handler	Outlay	Description	Outstanding	Bill Now
Bill Partially	F	FLY001/0002	BH		Registration of title	600.00	300.00

Total Fees: 300.00  
Total Outlay: 300.00  
Grand Total: 300.00



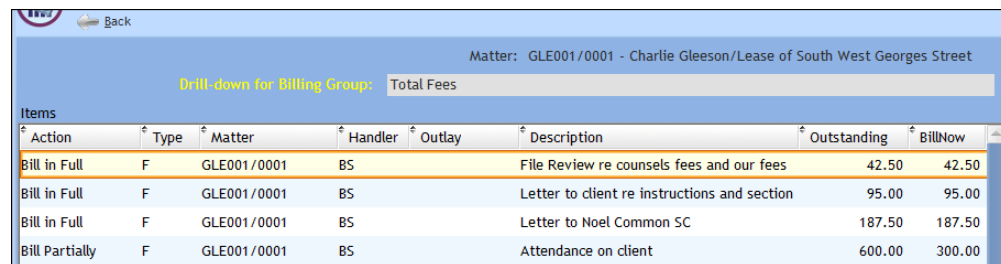
## How to Drill down to view all items in a group

- 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.



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

**Draft Invoice**

Message: \_\_\_\_\_

Request Type: ☒ Invoice ☐ Open Invoice ☐ Bill Sent Invoice / Bill No: (not invoiced)

**Matter Details**

Matter: FLY001/0001 Jack Flynn

Fee Earner: 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

**Summary**

Bills: 0.00  
Outlay: 0.00  
Client: 0.00  
Charges: 282.50  
Time (HH:MM): 1:53

**Invoice Details**

Type	Narrative	Net	VAT Value	Fee Earner
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

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.

**Add or edit Bill Detail Line**

Jack Flynn

Sale of House at: 4 The Mews, Rathfarnham, Dublin 6

☒ Fees ☐ Outlays ☐ Miscellaneous Outlays

Fee Earner: Carol Nolan

Nominal: Fees Issued - Carol Nolan

Narrative: \_\_\_\_\_

Net: 0.00 VAT Code: U VAT Value: 0.00 ☐ Override VAT

Ok Cancel

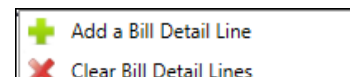
Line No: (new)

iv) Click **OK** to add to the invoice. Repeat the process for each additional line required.

## c. How to amend the Fee Earner Breakdown

i) Click the **Fee Earner Breakdown** Tab.

Invoice Details		Fee Earner Breakdown			
Fee Earner	Percentage	Value	VAT	VAT Amount	



The breakdown will have been calculated automatically, based on time charged in the invoice in respect of each fee earner.

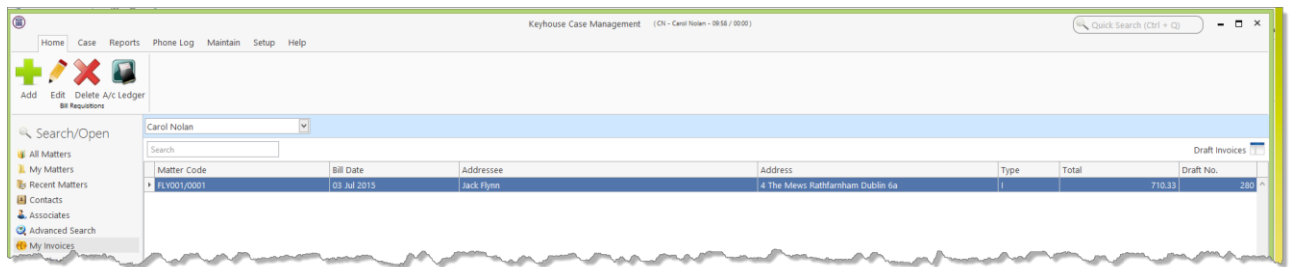
ii) To amend right-click and select **Maintain Fee Earner Breakdown**.

- 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.

Fee Earner	Percentage	Value
Carol Nolan	65.36797	867.76
Brian Sweeney	34.63203	459.74

- 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





## Change the Billing Layout

1. Create the Invoice as normal
2. Click on the drop-down arrow to the right of Billing Layout

3. Select the required Billing Layout and process the Invoice as normal.

## 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
<b>TOTAL</b>					<b>1 : 53</b>				<b>282.50</b>

**Summary WIP Fee Earner**

Fee Earner	Time (Hrs:min)	Charge
Carol Nolan	1 : 53	282.50
<b>WIP Totals</b>	<b>1 : 53</b>	<b>282.50</b>

**Unbilled Outlay**

Date	Ref	Narrative	UnBilled Outlay	Cumulative UnBilled Outlay
<b>UnBilled Total</b>				

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**.

Time Ledger for Fe between dates

Enter Parameters

Handler Code: CN

From Date: 01 Jul 2015

To Date: 31 Jul 2015

Chargeable or NonChargeable Items: All

Run Close

**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.

View Report

Soo Grabbit & Runne

**Time Entry For FE Between Dates Report**

CN : Carol Nolan

Date Date : 10/08/2015 9:00  
From Date : 01/07/2015  
To Date : 31/07/2015

Matter	Client	Matter Description	Hrs:min	Rate	Charge	Task	Comment
<b>Time Entry Date : 03/07/2015</b>							
Admin Time			0 : 10	60.00	60.00		Golf Tournament
			3 : 00	60.00	60.00		
			30 : 01	60.00	60.00		
AIG001/0002	Allied Investment Group	Garry Barlow -> Hired Talent	2 : 00	€150.00	€300.00	DIC : Dictation	Dictation
BLA001/0001	Gordon T. Black	RTA Walskinstown Crossroads, G. Black	0 : 30	€150.00	€75.00	ATT : Attendance	Attendance
BL0001/0005	Joe Bloggs	Advice File	0 : 00	60.00	€570.00		obituary
BRE001/0001	Miss Breece	Broken left leg.	1 : 00	€150.00	€150.00	ADV : Advice	Talked with Mike re options for settlement
			1 : 00	€150.00	€150.00	DIC : Dictation	Dictation to Doctor and Opposing Counsel
			0 : 30	€150.00	€75.00	REV : File Review	Review Medical Report
			1 : 00	€150.00	€150.00	INS : Instructions received	Instructions received - Meeting with Client
FLY001/0001	Jack Flynn	Sale of House at : 4 The Meus, Rathfarnham, Dublin 6	1 : 00	€150.00	€150.00	COU : Court Attendance	Court Attendance
			0 : 11	€150.00	€27.50	PHO : Phone Call	Phone Call
			1 : 00	€150.00	€150.00	DRA : Document Drafting	Document Drafting
			0 : 10	€150.00	€25.00	PHO : Phone Call	Phone Call
			0 : 30	€150.00	€75.00	DRA : Document Drafting	Draft Bill No274
FLY001/0002	Jack Flynn	Purchase of 15 The Hayman, Terenure, Dublin 6	0 : 02	€150.00	€5.00	ATT : Attendance	Attendance
			0 : 50	€150.00	€125.00	DEM : Demand & Draft Proceedings	Demand & Draft Proceedings
			1 : 00	€150.00	€150.00	COU : Court Attendance	Court Attendance
			0 : 30	€150.00	€75.00	ATT : Attendance	Attendance
			3 : 01	€150.00	€450.50	DEM : Demand & Draft Proceedings	Demand & Draft Proceedings
			2 : 00	€150.00	€300.00	COU : Court Attendance	Court Attendance
<b>03/07/2015</b>							
<b>Daily Time</b>			<b>Daily Value</b>				
Daily Recorded Mins: 49 : 25			€3,005.00		Admin (Hrs): 33 : 11		
Chargeable (Hrs): 16 : 14			€0.00		Unassigned (Hrs): 0 : 00		
Non-Chargeable (Hrs): 0 : 00			€0.00		Write Offs (Hrs): 0 : 00		
			€3,005.00				

Page 1 of 2 : Main Report

## 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
<b>CN Carol Nolan</b>						
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
<b>2011 May</b>						
08/05/2010	12/05/2011	BLA001/0001	Gordon T. Black	RTA Walkinstown Crossroads, G. Black	0.02	1,075.00
<b>December</b>						
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
<b>2012 January</b>						
02/05/2012	31/01/2012	LOW001/0002	Lowery Developments	Receivership - Nama Properties No 2 Sandyford Estate	(925.00)	225.00
<b>March</b>						
10/11/2011	06/03/2012	LAW001/0001	Liz Lawlor	Advice re Inheritance tax	(5,000.00)	147.00
<b>2014 June</b>						
20/05/2011	19/06/2014	ABA001/0001	David Abrahams	Family Law	(7,737.17)	4.00
					<b>Chargeable WIP</b>	<b>9,961.70</b>
					<b>Non-Chargeable WIP</b>	<b>-</b>
					<b>Report WIP Totals :</b>	<b>9,961.70</b>
* Non-Chargeable Time						

2. The same options are available for printing, export and searching as in the case of the **Time Report** and **Billing Guide** report.

Soo Grabbit & Runne						
WIP for Fee Earner by Last Bill Date						
Data Date : 12/11/2014:21:14						
Started	Last Bill Date	Matter	Client Name	Description	Client A/C	WIP
<b>CN Carol Nolan</b>						
08/05/2004		ABB001/0001	George J Abbott	Sale 45 Somerset Road, Dublin 6	(345,000.00)	437.50
31/01/2012		ABB002/0002	Abbey & Procter	Share Holding Agreement	0.00	300.00
02/12/2005		BES001/0001	Business Time Limited	Lease of Unit 33, Eastgate Avenue, Dublin 12.	0.00	161.20
24/05/2011		FIN001/0002	Finance Department	Damages - 21 Main Street	0.00	3.00
11/12/2013		KEL002/0001	Sarah Kelly	Purchase of Property	0.00	4.50
02/05/2012		LOW001/0003	Lowery Developments	Receivership - Nama Properties - No 3 Sandyford Estate	(925.00)	500.00
01/01/2010		QUI002/0001	Niall Quinn	Accident at work	(2,000.00)	300.00
23/09/2010		SHA001/0003	John Shaw	Jones Trust	0.00	49.50
<b>2009 April</b>						
03/06/2010	20/04/2009	QUI001/0005	Alan Quinn	Sale of 12 Main Street, Bray, Co. Wicklow	0.00	600.00
<b>May</b>						
14/01/2011	30/05/2009	FIT001/0001	Scott Fitzpatrick	Estate of Joan Fitzpatrick	(480.75)	3.00
					<b>Chargeable WIP</b>	<b>2,358.70</b>
					<b>Non-Chargeable WIP</b>	<b>-</b>
					<b>Report WIP Totals :</b>	<b>2,358.70</b>
* Non-Chargeable Time						

## My Top WIP

1. Click **My Top WIP** on the Navigation panel in **Time Costing**.

**Soo Grabbit & Runne**

**Top Work In Progress By Fee Earner**

Data Date : 10/08/2015: 9:42

Fee Earner : CN

Including chargeable and nonchargeable time

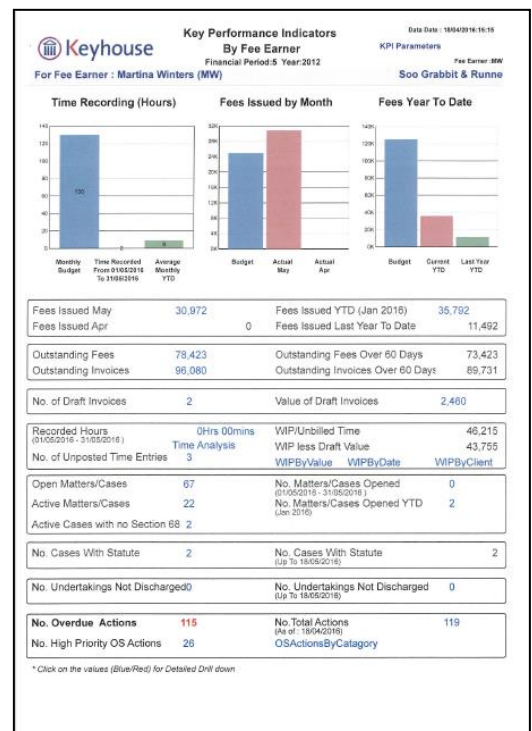
Matter	Last Bill Date	Client Name	Matter Description	Client A/c	WIP
<b>CN</b>	<b>Carol Nolan</b>				
LOW001/0001		Lowery Developments	Receivership - Nama Properties 1 Sandyford Estate	(2,100.00)	2,105.00
FLY001/0002		Jack Flynn	Purchase of 16 The Haywain, Terenure, Dublin 6	0.00	1,102.50
BLA001/0001	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 Sale of 12 Main Street, Bray, Co. Wicklow	(1,000.00)	667.50
QUI001/0005	05/06/2010	Alan Quinn	Receivership - Nama Properties - No 3 Sandyford Estate	0.00	663.00
LOW001/0003		Lowery Developments	RTA Whites Cross, Stillorgan	(925.00)	625.00
DEA001/0001	03/08/2010	James Deane	Accident at work	0.00	375.00
QUI002/0001		Niall Quinn	Outstanding debt to PTSB Bank.	(2,000.00)	363.00
TJF001/0001		TJ Fox	Lease of Unit 33, Eastgate Avenue, Dublin 12	0.00	312.50
BES001/0001		Business Time Limited	Share Holding Agreement	0.00	301.20
ABB002/0002		Abbie Lynch	Garry Barlow -v- Hired Talent Services	0.00	300.00
AIG001/0002		Allied Investment Group	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6	0.00	300.00
FLY001/0001		Jack Flynn	Receivership - Nama Properties No 2 Sandyford Estate	0.00	282.50
LOW001/0002	31/01/2012	Lowery Developments	Receivership - Nama Properties - No 81 Sandyford Business Park	(925.00)	225.00
LOW001/0004	31/12/2011	Lowery Developments	Advice re Inheritance tax	(925.00)	192.00
LAW001/0001	06/03/2012	Liz Lawlor	Legal Advice re Repatriation	(5,000.00)	147.00
BRO002/0001		Thomas Brolin	Jones Trust	(200.00)	110.00
SHA001/0003		John Shaw	Drunk Driving Arrest - 6th September 2009	0.00	49.50
TAL001/0001	16/11/2010	Deirdre Talbot	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6	0.00	42.50
SIM001/0001	25/04/2010	Bart Simpson	Debt collection against husband	0.00	25.50
LAW002/0001		Margaret Lawlor	Damages - 21 Main Street	0.00	10.00
FIN001/0002		Finance Department	Family Law	0.00	6.00
ABA001/0001	19/06/2014	David Abrahams	Estate of Joan Fitzpatrick	(7,737.17)	4.00
FIT001/0001	06/06/2010	Scott Fitzpatrick		(480.75)	3.00
<b>Report Totals</b>					<b>9,961.70</b>

- 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.

Type the text to find					
Preview FeesYTD x					
Key Performance Indicators					
Breakdown of Fees Issued Year To Date					
For Fee Earner : Brian Sweeney (BS)					
Bill Date	Matter	Client Name	Entry Date	Invoice Ref	VAT Value



## 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.

Date	Ref	Narrative	Billing A/c	Outlay A/c
30 Jun 2011	pc	Pd Registered Post		5.50
03 Jul 2011	5012368	Pd Brady & Co Search Fees		57.50
12 Jul 2011	pc	Pd Commissioner for Oaths swearing affidavit of debt		40.00

**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

Minimum Value (0 for All)

Open or Closed Matters

Show Details ☒

View Report

DOC PDF XLS

Type the text to find

**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
<b>Total Matters: 3</b>				<b>Total Balances:</b>	<b>6,619.38</b>	<b>0.00</b>	<b>0.00</b>

\* = 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.



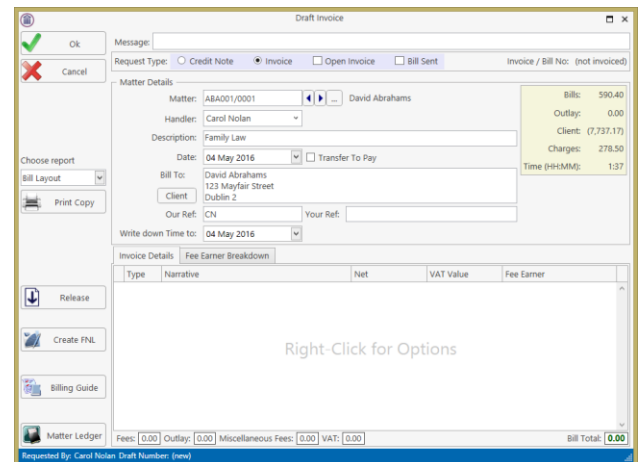
## How to Create a Draft Invoice

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.

**Client**

**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 (pg 124) above for particulars of how to use the Billing Guide wizard, 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. 148 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

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.

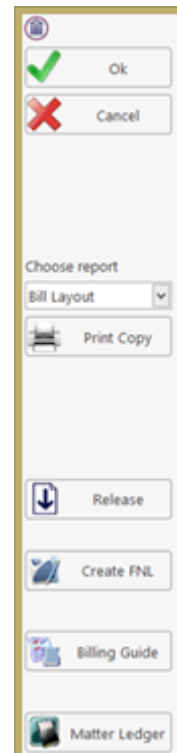
- Click on **Delete** on the Home tab or press **Delete** on your keyboard; you will be asked to confirm the deletion.
- Click **OK** to delete.

### How to Release a Draft Bill to Accounts

- Go to **My Invoices**.
- Double click** on the invoice to be released; the draft bill will appear.
- Click on the **Release** button on the left-hand panel to send to Accounts for approval.

### How to Print a Draft Bill

- Go to **My Invoices**
- Double click** on the bill you want to Print; the draft bill will appear.
- Click on the **Print Copy** button.
- 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 South West Georges Street Dublin 2	15 Nov 2014	
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	
E&OE		
<b>SUBTOTALS</b>	5.60	925.00
<b>925.00 @ 23.00 % VAT</b>		212.76
<i>Add total not subject to VAT</i>		5.60
<b>INVOICE TOTAL:</b>		<b>1,143.36</b>

### 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

RTA Walkinstown Crossroads, G. Black

Tel: 01 4766666

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 Airticity		106.61		
07 Aug 2015		FNI: 500.00 Gordon T. BL... Fees: 500.00 Outlay: 0.00 Vat: 0.00				
Client A/c Reserve			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 Sale of 10 Rose Lawn, Blanchardstown, Dublin 17		Tel: 01-569 7412 F/e: CN										
Original Debt Amount	<input type="text" value="0.00"/>			Total Collected To-date	<input type="text" value="0.00"/>									
Interest To-date	<input type="text" value="0.00"/>	<input type="button" value="Post Interest"/>		<input type="button" value="Post Payment"/>										
Recoverable Cost To-date	<input type="text" value="0.00"/>	<input type="button" value="Post Costs"/>		<b>Outstanding</b> <input type="text" value="0.00"/>										
Start Date	<input type="text" value="12 Feb 2016"/>	Record No	Comments:											
Your ref		Matter Status												
User3		Charge Arrangement				<input type="text" value="NIL"/>								
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	Post Payment
Interest To-date	2,652.05	Post Interest		
Recoverable Cost To-date	60.00	Post Costs		
		<b>Outstanding</b>	<b>47,112.05</b>	

Input the following information on the **Post Payment** dialogue box:

**Post payment**

Payment Properties Allocation

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

Save Cancel

**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.



**Post payment**

Payment Properties Allocation

Entry Date: 13 Jun 2016

Enter By: CN

Posting Ref: 45

Remitted:

Date Remitted: Please select date

Held Date: Please select date

☐ Bounced

Save Cancel

- 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**.

**Post Interest**

Calculate Interest Based On The Following

Monthly

Rate at: 5.00%

From: 01 Jan 2016 To: 31 Mar 2016

On: 1700.00

Description: 1st Quarter

Calculate Interest: 255.00

Save Cancel

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.

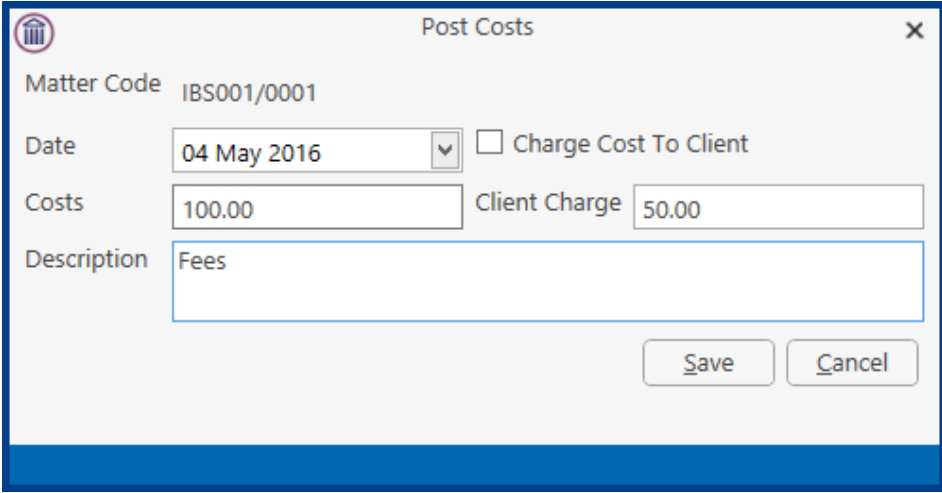
**On:** **Input** the amount on which the interest is to be calculated.

 **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 image shows a 'Post Costs' dialog box with a blue border and a close button (X) in the top right corner. It contains the following fields and controls:

- Matter Code:** IBS001/0001
- Date:** 04 May 2016 (with a dropdown arrow)
- ☐ **Charge Cost To Client**
- Costs:** 100.00
- Client Charge:** 50.00
- Description:** Fees
- 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.

- Click **Save** to post the cost, the balance will update.

## How to Amend an Entry

- Click **Debt Ledger** on the **Case Diary** navigation panel.
- Double click on the entry you want to amend.
- Amend as required and click **Save** to post the change.

## How to Print a Debt Ledger Report

- Click on **Debt Ledger** on the **Case Diary** navigation panel.
- Click on **Print** on the Home tab. The following dialogue box will appear.
- Click on the Run Button a report will be generated see the following example.

Type the text to find

View Report

## Debt Costing Ledger

Matter	IBS001/0001	International Business Services Ltd	
Original Debt	50,000.00	Debt Interest	2,852.00
Recoverable Costs	60.00	Collected to Date	5,800.00
		Outstanding	47,112.00

Date	Method	Type	Value	Premium Paid	Costs	Costs Paid	Interest	Interest Paid
25/06/2008		Costs	0.00	0.00	80.00	0.00	0.00	0.00
26/06/2008		Interest	0.00	0.00	0.00	0.00	2,852.00	0.00
26/06/2008	Cheque	Receipt	5,000.00	5,000.00	0.00	0.00	0.00	0.00
26/06/2008	Cheque	Receipt	800.00	800.00	0.00	0.00	0.00	0.00

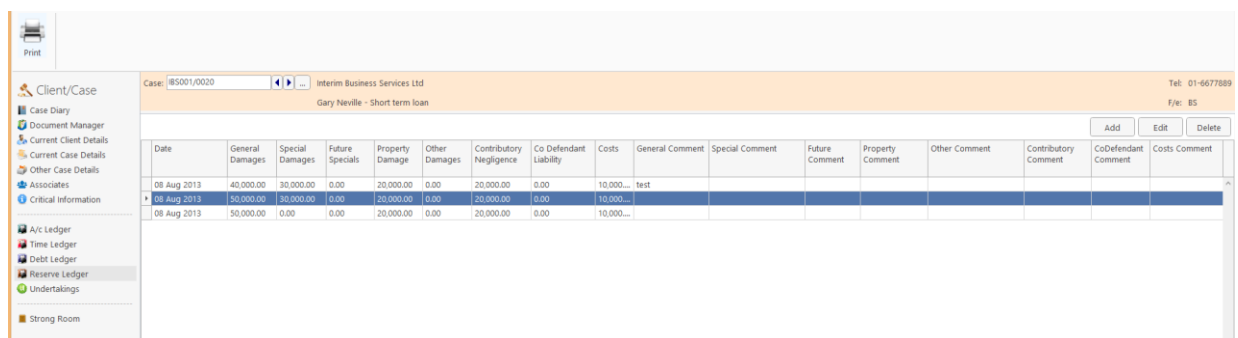
- Click **Print** on the Report Toolbar to send the report to the printer.

## 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.

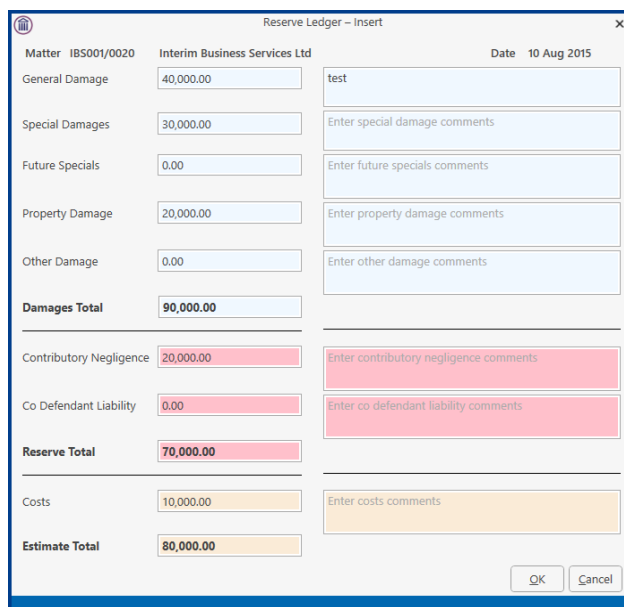


The screenshot shows the 'Reserve Ledger' window for Case IBS001/0020, Interim Business Services Ltd. The table displays the following data:

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 'Reserve Ledger - Insert' dialogue box is shown with the following fields and values:

- Matter:** IBS001/0020
- Interim Business Services Ltd**
- Date:** 10 Aug 2015
- General Damage:** 40,000.00
- Special Damages:** 30,000.00
- Future Specials:** 0.00
- Property Damage:** 20,000.00
- Other Damage:** 0.00
- Damages Total:** 90,000.00
- Contributory Negligence:** 20,000.00
- Co Defendant Liability:** 0.00
- Reserve Total:** 70,000.00
- Costs:** 10,000.00
- 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.

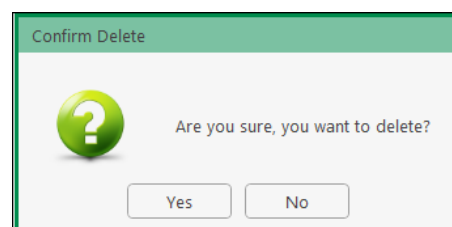
3. Click **OK** to add the entry.

## 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 D 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: PTSB - Branch Manager Branch Manager called to say a payment was rece...	Outstanding debt to PTSB 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 PTSB Bank.
BRE001/0001	03 Jul 2015	Mike Breeze	CN	Caller: Mike Breeze Wants to discuss settlement options with Defendant. Wants to...	Broken left leg.
FLV001/0002	03 Jul 2015	Jack Flynn	CN	Caller: James Bay Draft Contracts are ready for review.	Purchase of 16 The Haywain, Terenure, Dublin 6
SAH001/0001	02 Jul 2015	Bart Simpson	CN	Called client to remind him to send back the papers	Sale of House at: 4 The Mees, Rathfarnham, Dublin 6
FLV001/0001	02 Jul 2015	Jack Flynn	CN	Called client to remind him to send back the papers	Sale of House at: 4 The Mees, 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
ABR001/0001	08 Aug 2014	George J Abbott	MK	Telcon with etc etc	Sale 45 Somerset Road, Dublin 6
AIG001/0004	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
AIG001/0003	29 May 2014	Allied Investment Group	BS	Frank phoned Claims team to follow up on file details	Zara Kennedy -> Carl Indigo
AIG001/0002	27 May 2014	Allied Investment Group	BS	Alan phoned regarding uncompleted claims form	Garry Barlow -> Hired Talent Services
BEC001/0006	20 May 2014	Angela Beck	BS	Phone lender for redemption statement - Any note	14 Windy Arbour, Sunning, Surrey SU1 2BW
DUG001/0001	19 May 2014	Paul Duggan	BS	Phone buyers' solicitors, check buyers' full names	21 Clonard Village, Chiswick, London W5 8NH
BL0002/0001	19 May 2014	David Bloggs	BS	Phone lender for redemption statement	6 Hill Street, Cork, Surrey ST56 6Y
DUG001/0001	09 May 2014	Paul Duggan	BS	Phone buyers' solicitors, check buyers' full names	21 Clonard Village, Chiswick, London W5 8NH
DUG001/0001	07 May 2014	Paul Duggan	BS	Phone lender for redemption statement	21 Clonard Village, Chiswick, London W5 8NH
AIG001/0001	29 Apr 2014	Allied Investment Group	BS	Phone Call to discuss potential damages and costs.	Noel Brown -> Jones Services Ltd
ABR002/0001	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.
FLV001/0002	14 Mar 2014	Jack Flynn	BS	Phone Call from Jack Flynn re: the H... & Safa...	Phone Call from Jack Flynn re: the H... & Safa...

3. The **Phone Log** will open displaying all recorded calls.



**Tip** to refresh the phone log click **Phone Log** on the Home tab.

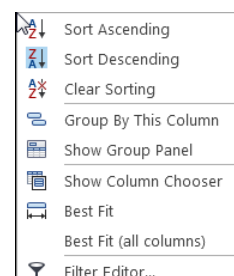
#### Search the Phone Log

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.



## 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	Bill Clinton		test test test
✓	ABB001/0001	08 Aug 2014	Paula		Telcon with etc etc
✓	AIG001/0004	29 May 2014	Bob Murphy		Sean enquired about third party cover. I informed him t
✓	AIG001/0003	29 May 2014	Georg		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	Chow Ming Zhang		Phone lender for redemption statement - Any note
✓	DUG001/0001	19 May 2014	Claire Bourke		Phone buyers' solicitors, check buyers' full names
✓	BLO002/0001	19 May 2014	Angel		Phone lender for redemption statement
✓	DUG001/0001	09 May 2014	David		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).

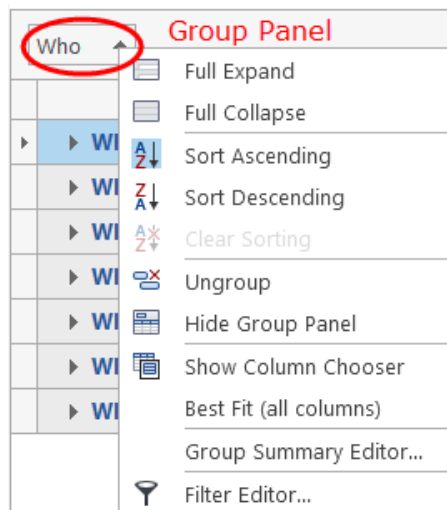
## How to Group column headings in the Phone Log

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 ZZZZZZ/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

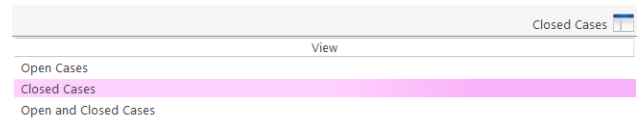
1. **Open** the phone log.
2. Select the message you want to delete.
3. Click **Delete** on the Phone Log tab. You will be asked to confirm the deletion.
4. Click **Yes**.

 **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.



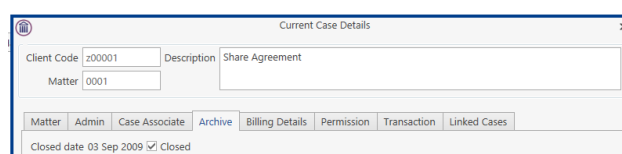
### How to view the Archived Diary & Ledger of a closed case

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.

**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

Fee Earner: Carol Nolan    File Ref: FLY002/001  
Secretary: Anne Mellon    Enter  
Partner: Stephen Keogh    Enter  
Department: Conveyancing    Enter  
Work Type: Purchase    ☐ Mark as Important    ☐ Statement  
Old Reference: FLY001/001    Branch: Dublin Office

**Case Plan & Status**

Case Plan/Type: Property Purchase    File Colour: Select file colour    Clear  
Case Status: Loan approval received    Record No: Enter record no

File Number: 362    OK    Cancel

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

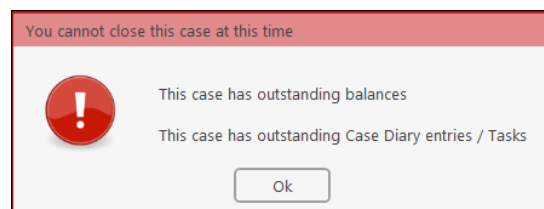
**Archive** | Matter | Admin | Additional Details | Case Associate | Billing Details | Permission | Linked Cases

☒ 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

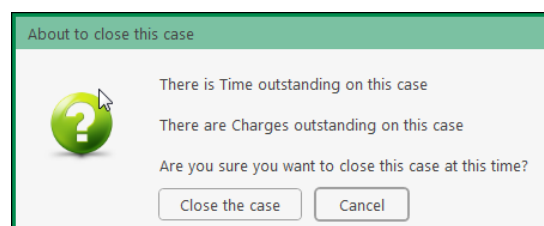
File Number: 362   

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.

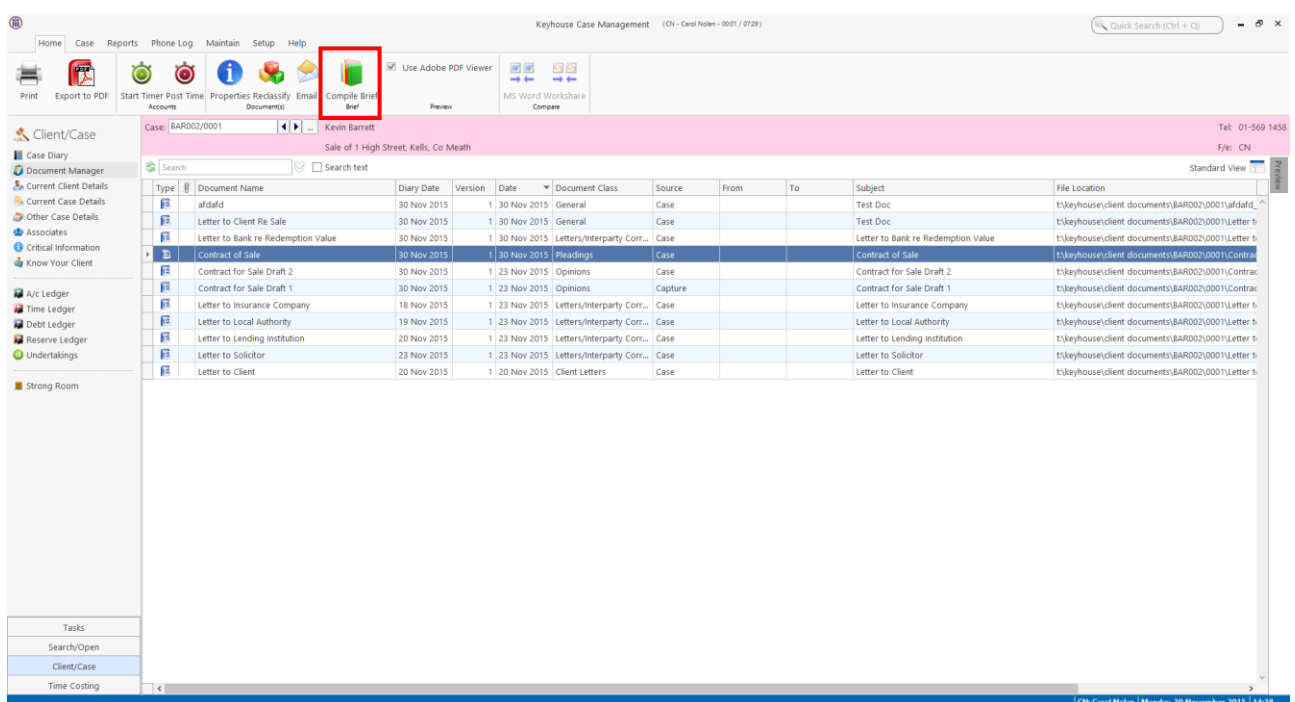
### Important Steps for preparing your Brief

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](mailto:support@keyhouse.assist.com)

### Assembling a Brief

1. **Open** a case in the Case Diary.
2. Click **Document Manager** on the Navigation panel.



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**.

The screenshot shows the 'New Brief Wizard' window with the 'Brief Assembly Wizard' title. The main heading is 'Using a Brief Template'. On the left, there is a list of 'Brief Template' options: 'Booklet of Title' and 'Personal Injury Litigation' (which is highlighted in pink). Below this list is a checkbox labeled 'Do not use a Brief Template'. On the right, there is a table with columns 'Type', 'Sequence', and 'Section'. The table contains three rows: '-1 Interparty Correspondance', '3 Pleadings', and '4 Reports' (highlighted in pink). At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.

Type	Sequence	Section
📁	-1	Interparty Correspondance
📁	3	Pleadings
📁	4	Reports

6. There are three options for populating the brief with documents:

The screenshot shows the 'New Brief Wizard' window with the 'Brief Assembly Wizard' title. The main heading is 'Populating the Brief'. There are three radio button options: 'Do not copy any documents into the Brief', 'Copy documents into the Brief when their Class matches a Brief Section' (which is selected), and 'Copy all documents into the Brief and create Sections as required'. To the right of these options are three question mark icons. Below the options is a small asterisk note: '\* You can manually Drag and Drop documents listed under "Not included in this Brief" into your Brief after completing the Assembly Wizard'. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.

- **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

Published: 06 Jan 2015

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 - 04/24 / 03/06)

Home Case Reports Phone Log Maintain Setup Help

Use Adobe PDF Viewer Show Preview Stay in original section

Preview Drag and Drop Brief Sections Create List Brief Templates New Brief Open Brief Re-order Brief Properties Finalise (Re)generate Open in Word Open in Adobe

Client/Case Case Diary Document Manager Current Case Details Other Case Details Associates Critical Information

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

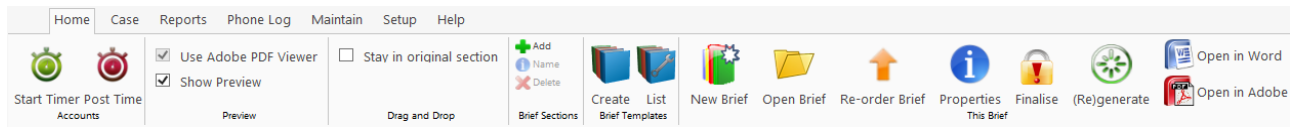
Type	Document Name	Class	Document...	Action Pri...	Action Type
Section: 001	Client Correspondence (3 documents)				
Section: 002	Letters/Interparty Correspondence (9 documents)				
Section: 999	Documents Not Included in this Brief (25 documents)				



8. The sections in the brief will be displayed.

## Brief Home tab

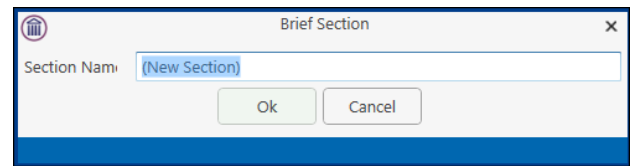
The Home tab in the Brief:



## Brief Sections

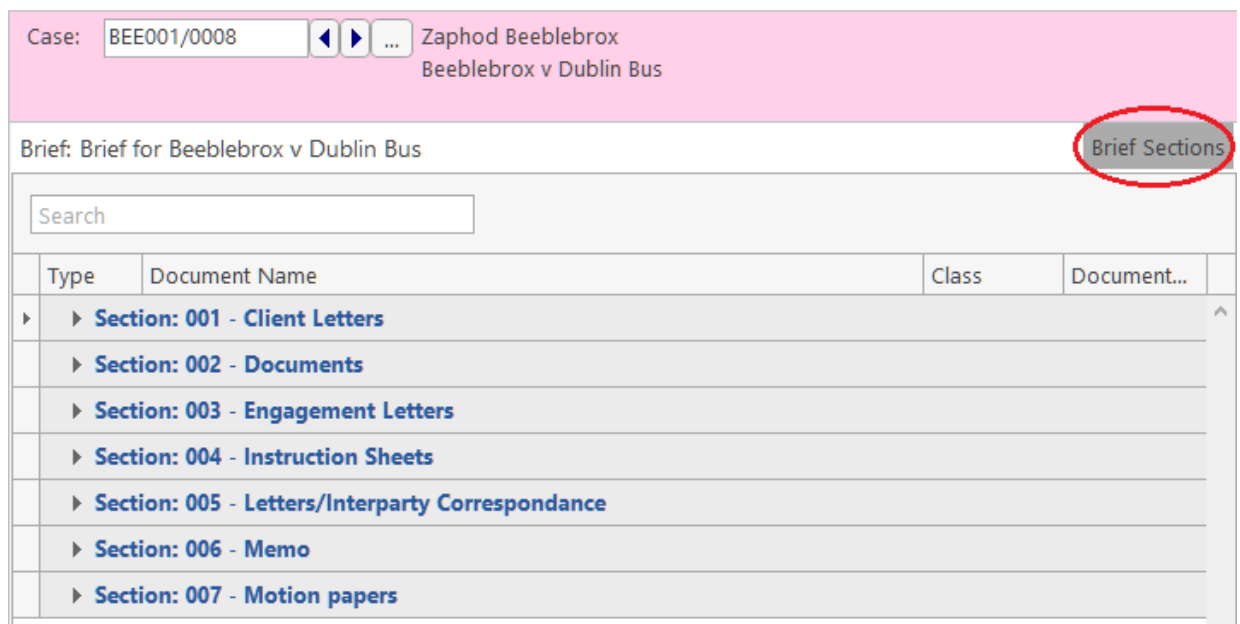
### How to Add a Section

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

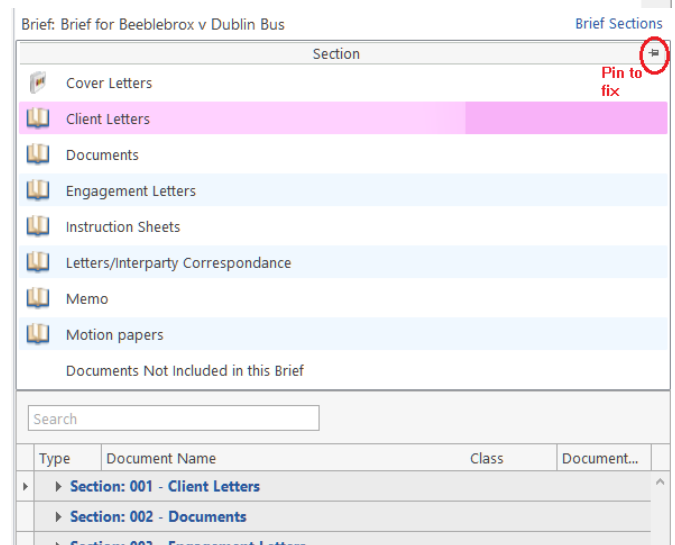
1. Click **Brief Sections** on the right of the brief screen



2. A list of sections will be expanded.

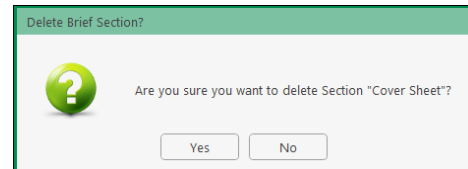
 **Tip:** To Show the list permanently click the pin.

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. 173 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. 173 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.

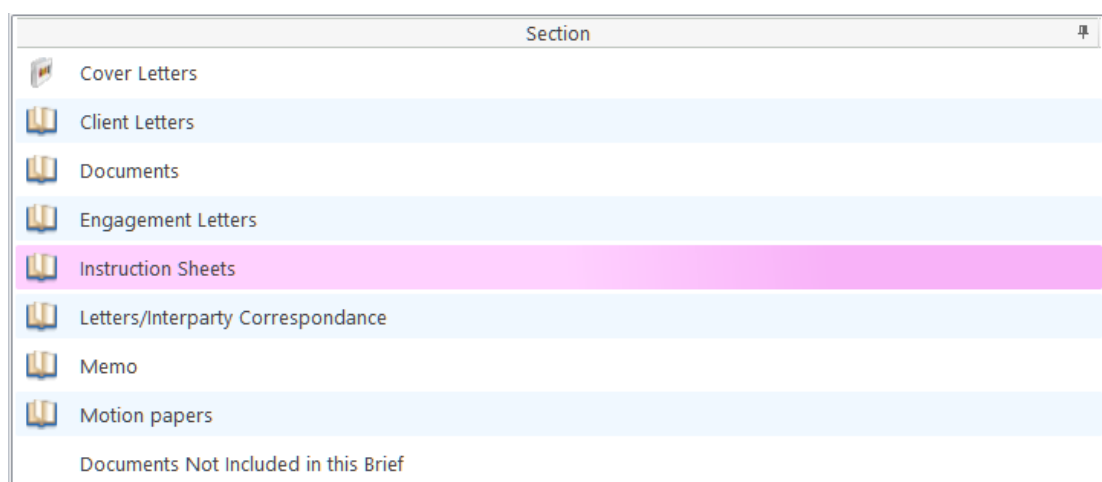
Move the selected section **up one position**.

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. 173 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.

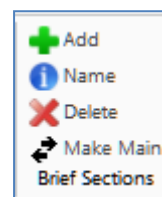



4. **Drag** the document to the upper part of the window and **drop** it into the required section. In the example above, one might select the document **Terms of Engagement** and drag it into **Instruction Sheets** (which is selected in the upper part of the window).

Search				
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. 173 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.

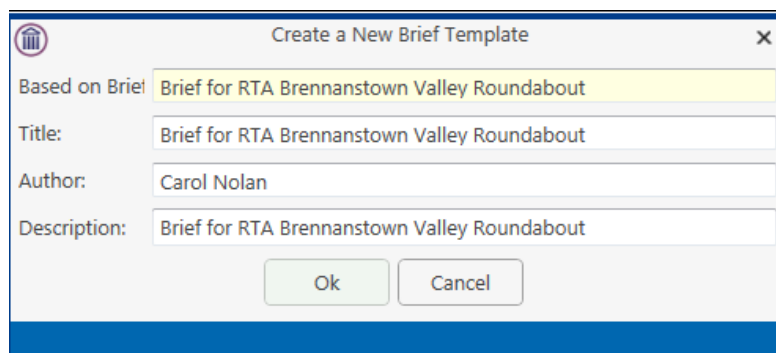


 **Main** sections are included in the Table of Contents; **Cover** sections are intended to contain cover letters and similar preliminary material.

## 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**



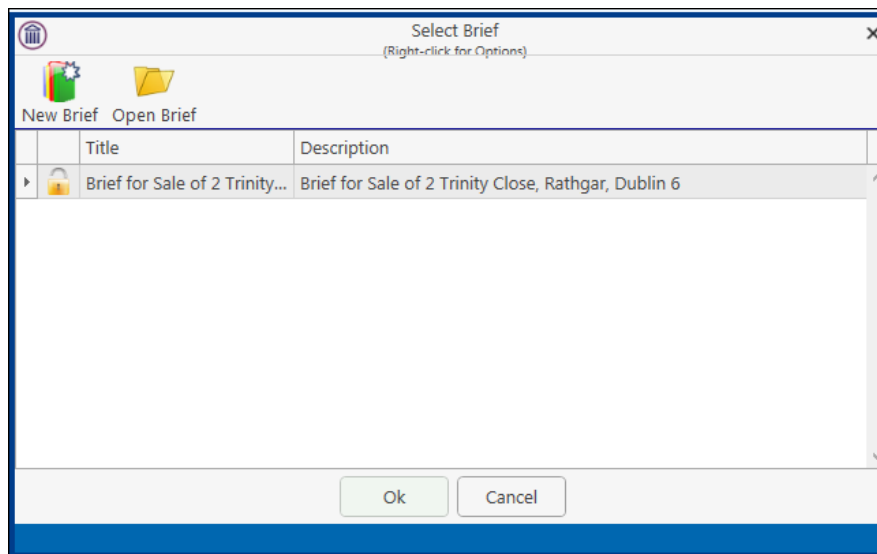
By default, the template title will be the same as the title of the Brief on which it is based. As it is to be

used as a template, it may be advisable to change it to something more generic.

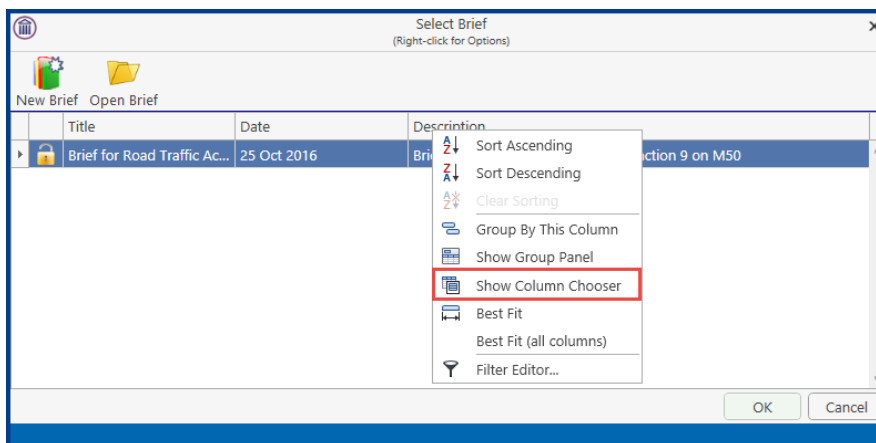
3. Click OK.

## How to Open a Brief

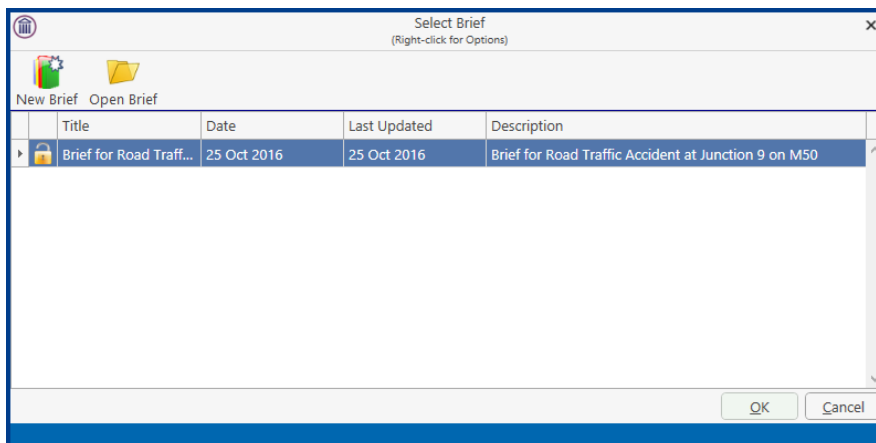
1. **Open** a case in the Case Diary.
2. Then click **Document Manager** on the Navigation panel to view the Document Manager.
3. Click **Compile Brief** on the Home tab in **Document Manager**. The **Select Brief** screen will appear.



4. Select the brief to open and click **Open Brief**.
5. To see when the brief was last updated, right click on the Header Row and right click.





6. Select **Last Updated** and drag to the Header Row, placing it in the required location.



**Note** if you are already working in the brief screen, you may click **Open Brief** on the Home tab.

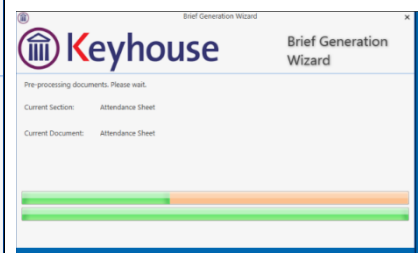
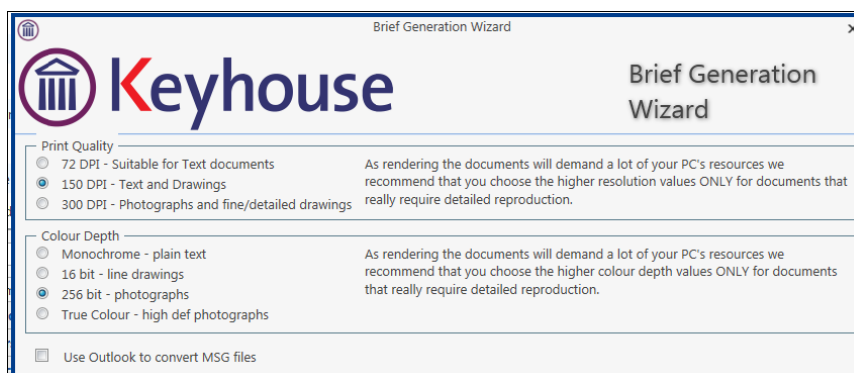
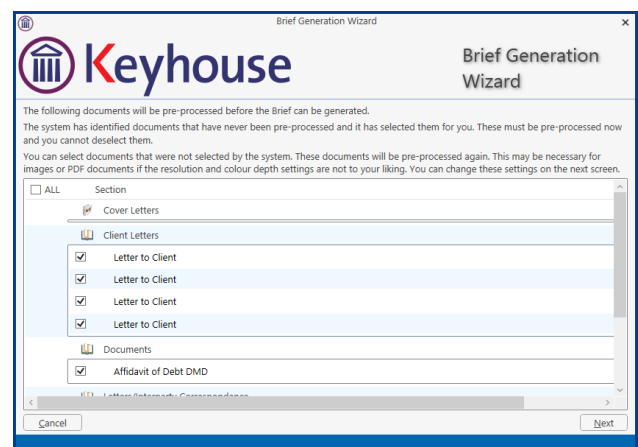
## Generate the Brief

-  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.

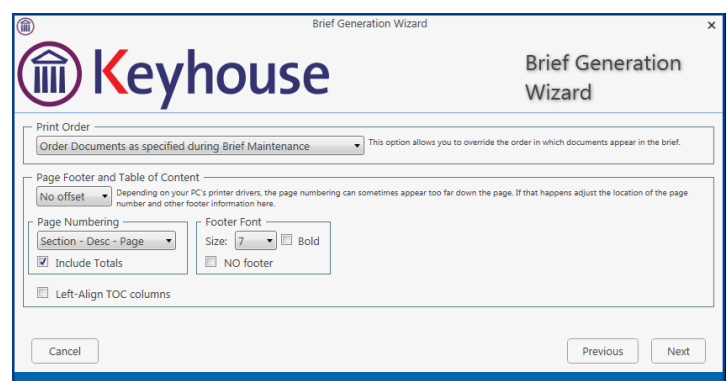
## How to (Re) Generate a Brief

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.



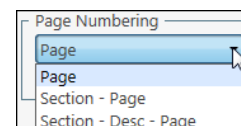
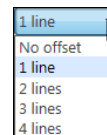
Check the box to use Outlook to convert MSG files.

5. Click **Next**. A screen will show the progress of the document pre-processing.
6. When pre-processing has been completed, you will have the opportunity to set the print order of the brief, the contents and position

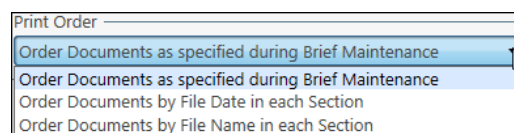


of the footer and the alignment of columns in the table of contents.

- 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”).

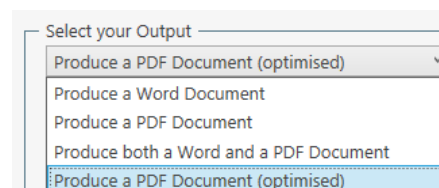


- You can set the footer font size and weight, or provide that there should be no footer.
- You may check the box to Left-Align the Table of Contents columns; if you leave the box unchecked, the page numbers will be right-aligned.



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. You may also choose to produce a folder of documents instead of a single document.

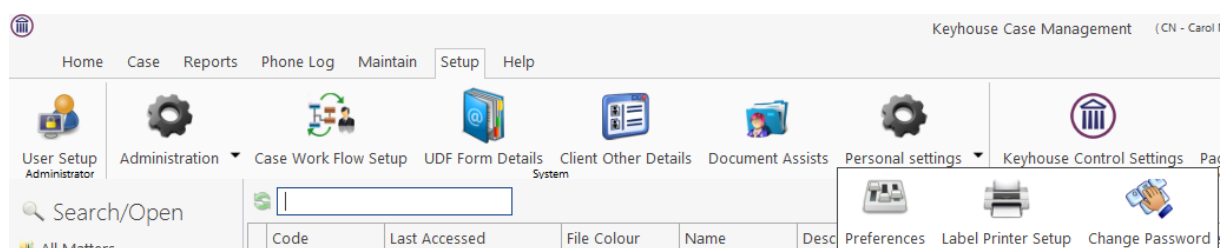


9. Click Finish. The brief will now be generated. This may take some time to complete.

## Setting your Preferences

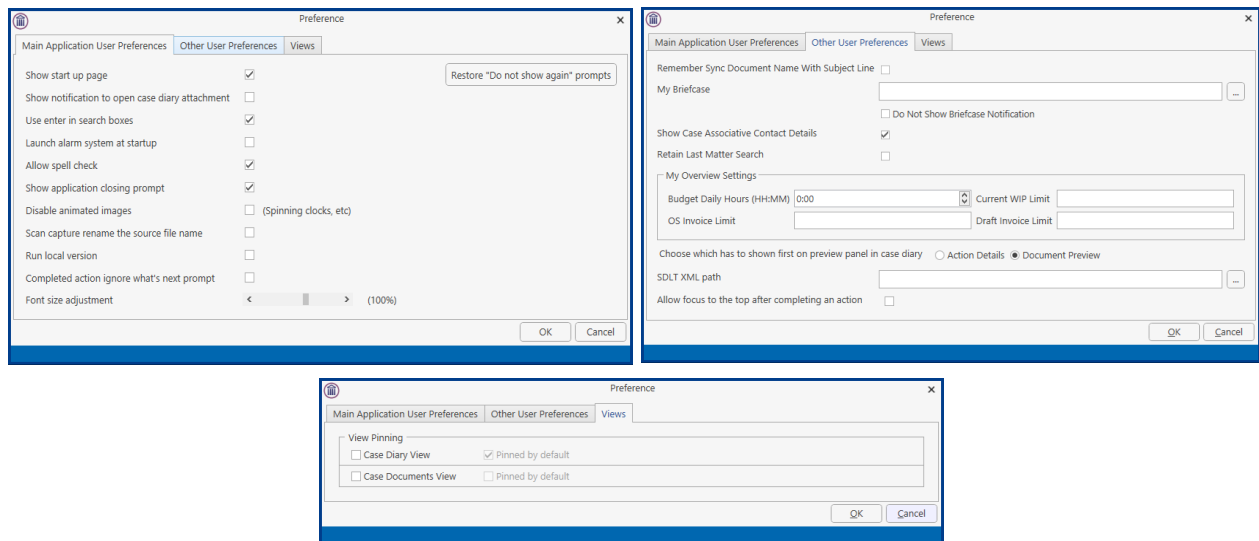
Users can set system preference on their computers. To do this:

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 clicks 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.

Restore 'Do not show again' prompts

Will restore all prompts that were previously deactivated.

### 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

To ensure that the cursor stays at the top of the Case Diary when an action is completed, tick this box.

Allow focus to the top after completing an action


### 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 to the default view as they move from matter to matter.

- Set the Preferences required and click OK.

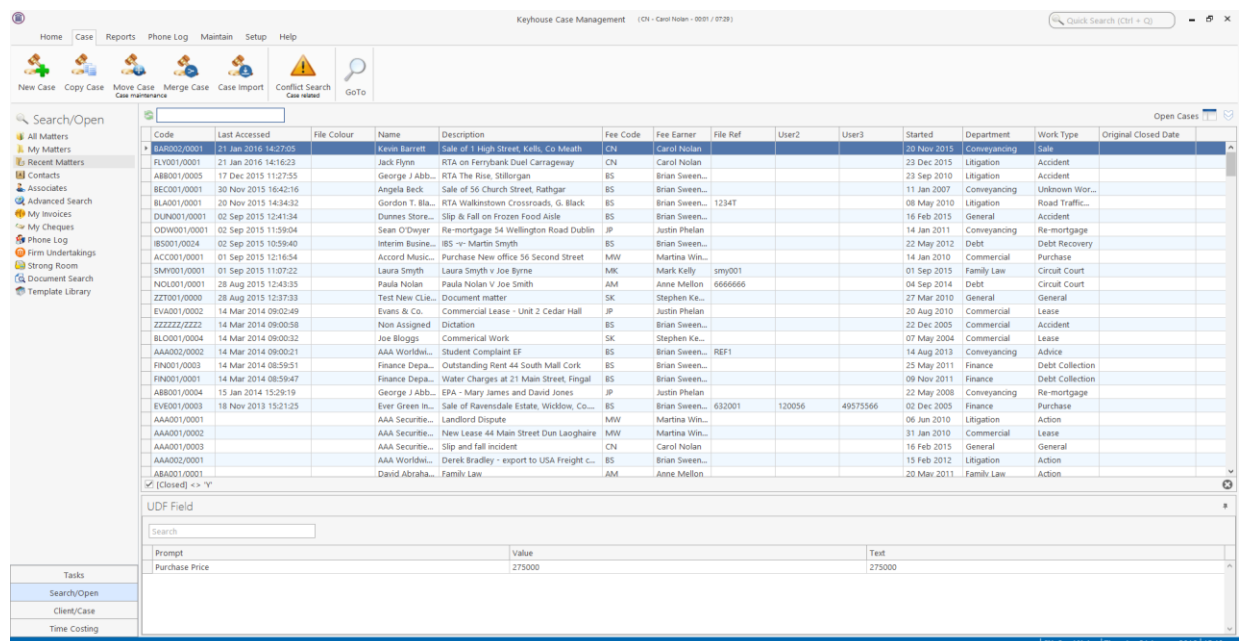
## Creating User Views

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 to the original view when you leave the screen. View can be created where ever

you see this icon. 

## Creating a View

- Go to the screen where the view is to be created



The screenshot displays the Keyhouse Case Management application. The top navigation bar includes Home, Case, Reports, Phone Log, Maintain, Setup, and Help. A search bar is located on the right. The left sidebar shows a 'Search/Open' menu with options like All Matters, My Matters, Recent Matters, Contacts, Associates, Advanced Search, My Invoices, My Cheques, Phone Log, View Underlings, Strong Room, Document Search, and Template Library. The main area shows a table of cases with columns: Code, Last Accessed, File Colour, Name, Description, Fee Code, Fee Earning, File Ref, User2, User3, Started, Department, Work Type, and Original Closed Date. Below the table, there is a 'UDF Field' configuration section with a search bar and a table for defining fields. The table has columns for Prompt, Value, and Text. The first row shows 'Purchase Price' with a value of '275000' and a text of '275000'.

Code	Last Accessed	File Colour	Name	Description	Fee Code	Fee Earning	File Ref	User2	User3	Started	Department	Work Type	Original Closed Date
BAR002/0001	21 Jan 2016 14:27:05		Kevin Barrett	Sale of 1 High Street, Kells, Co Meath	CN	Carol Nolan				20 Nov 2015	Conveyancing	Sale	
FLV001/0001	21 Jan 2016 14:16:23		Jack Flynn	RTA on Ferrybank Dual Carriageway	CN	Carol Nolan				23 Dec 2015	Litigation	Accident	
AB8001/0005	17 Dec 2015 11:27:55		George J Abbs	RTA The Rise, Stillorgan	BS	Brian Sween				23 Sep 2010	Litigation	Accident	
BE0001/0001	30 Nov 2015 16:42:16		Angela Beck	Sale of 56 Church Street, Rathgar	BS	Brian Sween				11 Jan 2007	Conveyancing	Unknown Wor...	
BLA001/0001	20 Nov 2015 14:34:32		Gordon T. Bla...	RTA Walkinstown Crossroads, G. Black	BS	Brian Sween	1234T			08 May 2010	Litigation	Road Traffic...	
DUN001/0001	02 Sep 2015 12:41:34		Dunnes Store...	Slip & Fall on Frozen Food Aisle	BS	Brian Sween				16 Feb 2015	General	Accident	
ODW001/0001	02 Sep 2015 11:59:04		Sean O'Dwyer	Re-mortgage 54 Wellington Road Dublin	JP	Justin Phelan				14 Jan 2011	Conveyancing	Re-mortgage	
IBS001/0024	02 Sep 2015 10:59:40		Interim Busine...	IBS - Martin Smyth	BS	Brian Sween				22 May 2012	Debt	Debt Recovery	
ACC001/0001	01 Sep 2015 12:16:54		Accord Music...	Purchase New office 56 Second Street	MW	Martina Win...				14 Jan 2010	Commercial	Purchase	
SAH001/0001	01 Sep 2015 11:07:22		Laura Smyth	Laura Smyth v Joe Byrne	AK	Mark Kelly	jmj001			01 Sep 2015	Family Law	Circuit Court	
NOL001/0001	28 Aug 2015 12:43:35		Paula Nolan	Paula Nolan v Joe Smith	AM	Anne Mellon	6666666			04 Sep 2014	Debt	Circuit Court	
ZZT001/0000	28 Aug 2015 12:37:33		Test New Clie...	Document matter	SK	Stephen Ka...				27 Mar 2010	General	General	
EVA001/0002	14 Mar 2014 09:02:49		Evans & Co.	Commercial Lease - Unit 2 Cedar Hall	JP	Justin Phelan				20 Aug 2010	Commercial	Lease	
ZZZZZZ/ZZZZ	14 Mar 2014 09:00:58		Non Assigned	Dictation	BS	Brian Sween				22 Dec 2005	Commercial	Accident	
BL0001/0004	14 Mar 2014 09:00:32		Joe Bloggs	Commercial Work	SK	Stephen Ka...				07 May 2004	Commercial	Lease	
AAA002/0002	14 Mar 2014 09:00:21		AAA Worlde...	Student Complaint EP	BS	Brian Sween	REF1			14 Aug 2013	Conveyancing	Advice	
FIN001/0003	14 Mar 2014 08:59:51		Finance Depa...	Outstanding Rent 44 South Mall Cork	BS	Brian Sween				25 May 2011	Finance	Debt Collection	
FIN001/0001	14 Mar 2014 08:59:47		Finance Depa...	Water Charges at 21 Main Street, Fingal	BS	Brian Sween				09 Nov 2011	Finance	Debt Collection	
AB8001/0004	15 Jan 2014 15:29:19		George J Abbs	EPA - Mary James and David Jones	JP	Justin Phelan				22 May 2008	Conveyancing	Re-mortgage	
EVE001/0003	18 Nov 2013 15:21:25		Ever Green In...	Sale of Ravensdale Estate, Wicklow, Co...	BS	Brian Sween	632001	120056	49575566	02 Dec 2005	Finance	Purchase	
AAA001/0001			AAA Securite...	Landlord Dispute	MW	Martina Win...				06 Jun 2010	Litigation	Action	
AAA001/0002			AAA Securite...	New Lease 44 Main Street Dun Laoghaire	MW	Martina Win...				31 Jan 2010	Commercial	Lease	
AAA001/0003			AAA Securite...	Slip and fall incident	CN	Carol Nolan				16 Feb 2015	General	General	
AAA002/0001			AAA Worldwid...	Derek Bradley - export to USA Freight C...	BS	Brian Sween				15 Feb 2012	Litigation	Action	
ABA001/0001			David Abbrah...	Family Law	AM	Anne Mellon				20 Mar 2011	Family Law	Action	

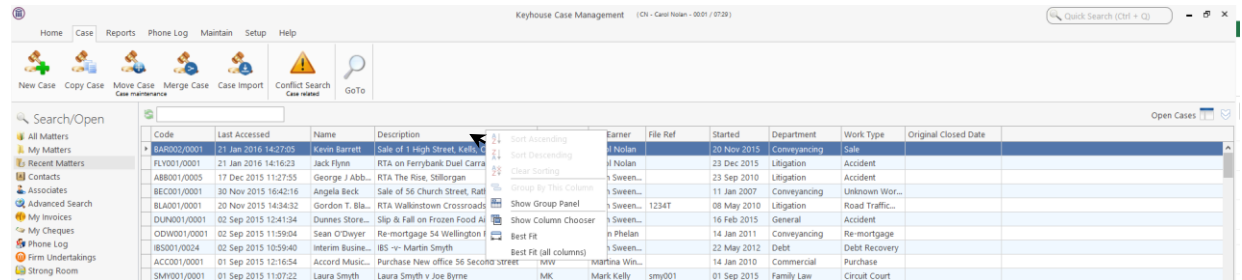
UDF Field

Prompt	Value	Text
Purchase Price	275000	275000

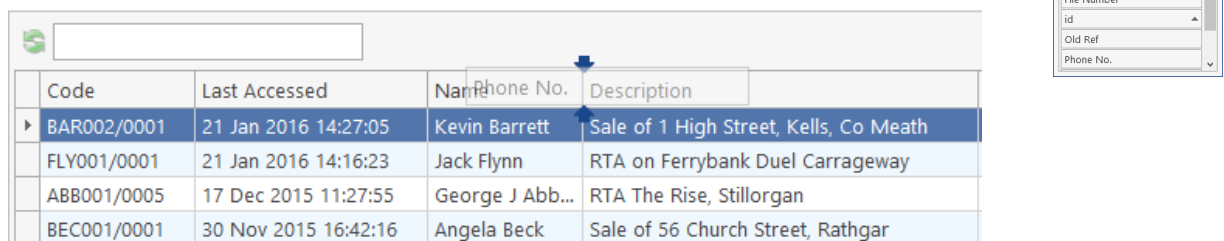
## 2. Make the changes to the screen:

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.

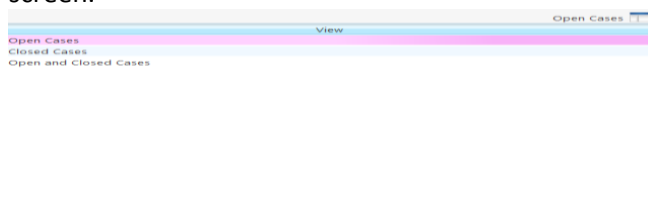


## 3. Select the required heading and drag it to the Header Row ensuring it is place between existing headings. Use the blue arrows as a guide.



## 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.

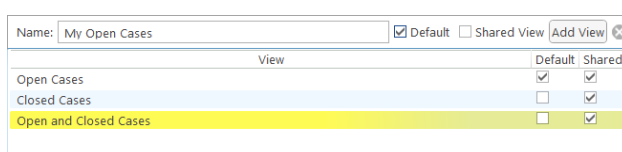



## 6. Right click on **View** and click on **Add or Edit**.

## 7. In the Name box enter the name of the view.

## 8. 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

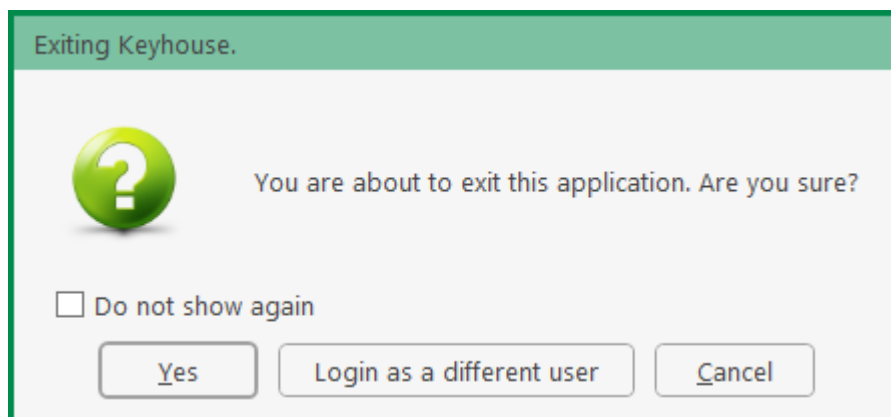
1. Go to the View icon and select the view required as a Default View.
2. Right click on the view and select **Make this your default view**.
3. This view will be the view visible each time you return to the screen.

## Chapter 19 – Closing Case Management

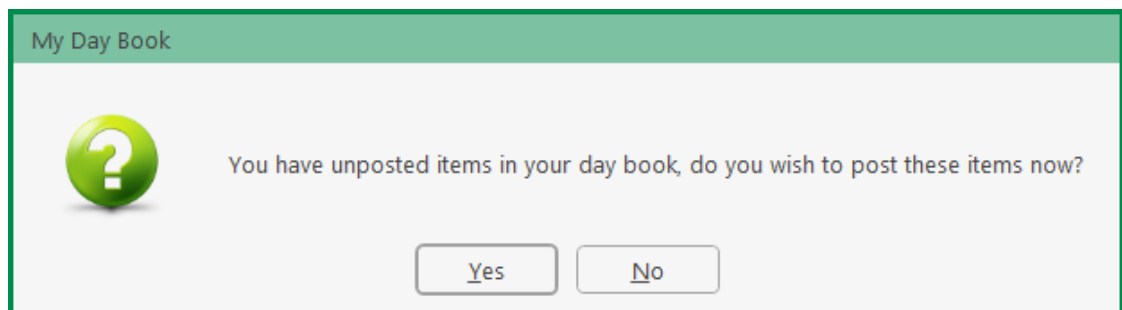
### Closing Keyhouse

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.