



KEYHOUSE ADMINISTRATOR USER MANUAL

VERSION 5.4.2.14

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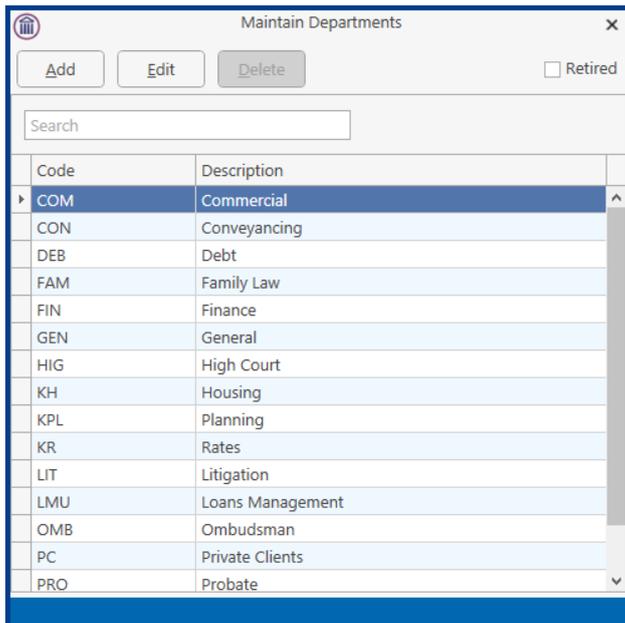
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PART 1: MAINTAIN

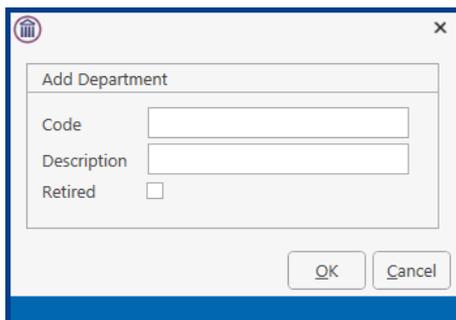
MAINTAIN DEPARTMENTS

Add A Department

1. Click **Maintain** from the list of Tabs
2. Click **Departments** from the ribbon. The following dialogue box appears.



3. Click the Add button to add a new department. The following dialogue box will appear.



Input the following details:

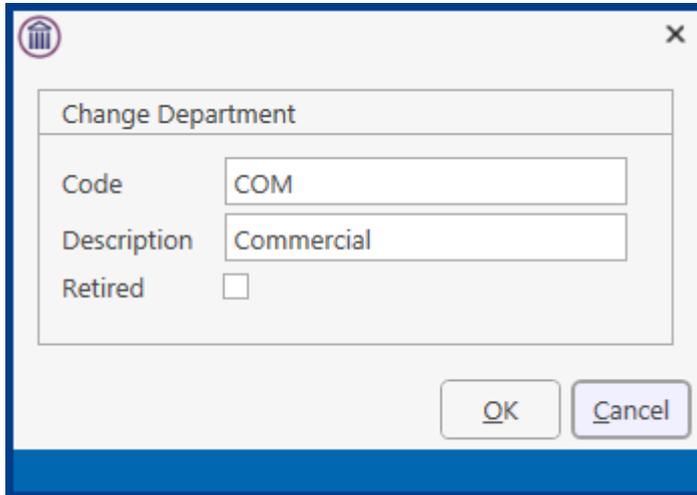
A three letter department code e.g. CON for conveyancing. In the Department Code Box.

Input a Description in the Description Box.

4. Click the **OK** Button. This department is now available for use.

Amend A Department

1. Open the **Department** Dialogue Box as before.
2. Select the department you want to amend. Click the **Edit** Button. The following dialogue box appears.



3. Make any changes required.
3. Click the **OK** Button and the changes take place.

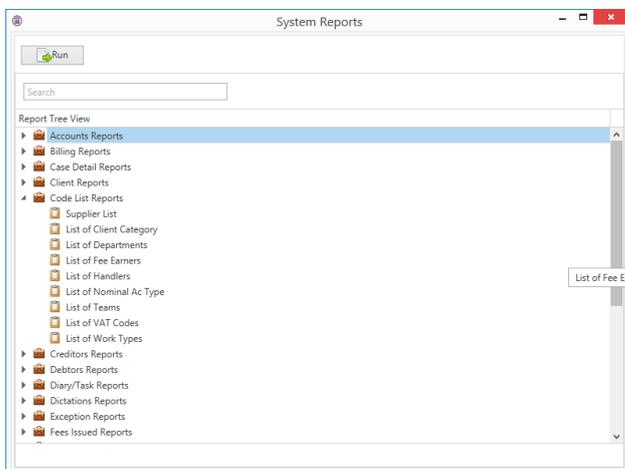
Retire A Department

1. Open the **Department** Dialogue Box as before.
2. Select the department you want to delete. Tick the **Retired** Box then click OK.

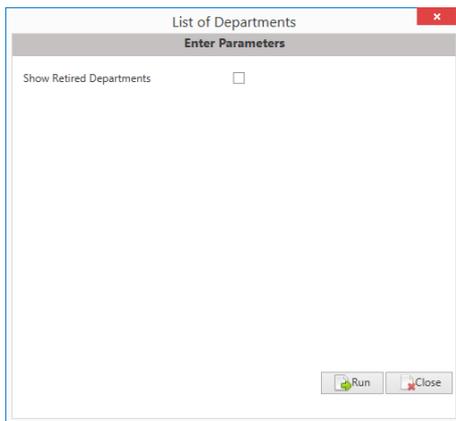
NOTE: If you have already assigned a department to a case matter you will not be able to remove that department record

Print A List Of Departments

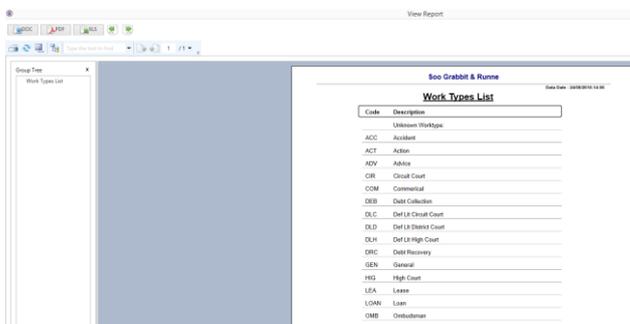
1. Click on the Report Tab and select System Reports
2. Click on the arrow beside Code List Reports



3. Select List of Departments. The following dialogue box will appear.



4. Tick the Show Retired Departments if you need to see old departments otherwise just click on Run.



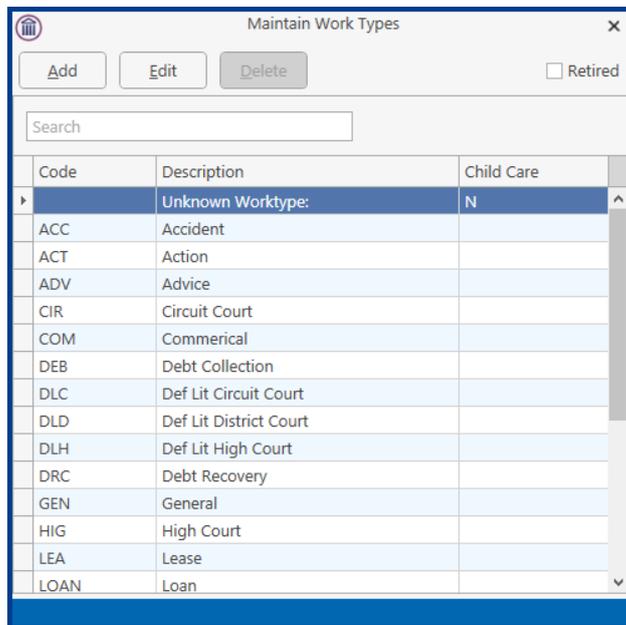
5. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN WORK TYPES

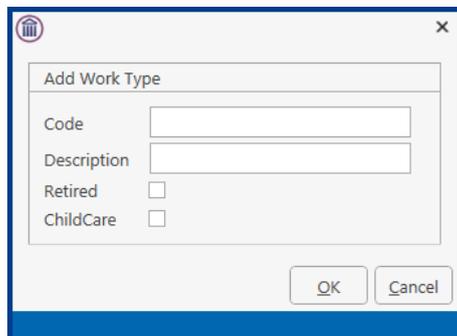
Work types are classification of work activities.

Add A Work Type

1. Click **Maintain** from the list of Tabs
2. Click **Work Types** from the ribbon. The following dialogue box appears



3. Click the **Add** button to add a work type. The following dialogue box appears.



Input a three letter work type code in the Code box.

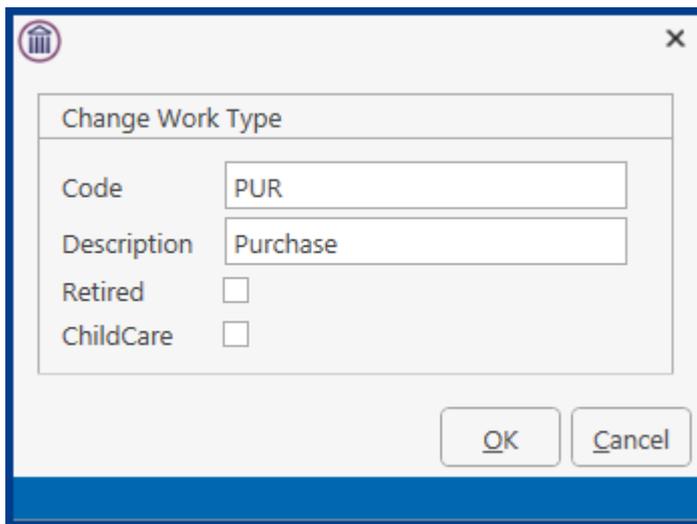
Input a description in the description box.

4. Click the **OK** Button to make this work type available for use.

Amend A Work Type

1. Open the **Work Type** Dialogue Box as before.
2. Select the **Work Type** you want to amend

3. Click the **Edit** Button. The following dialogue box will appear.



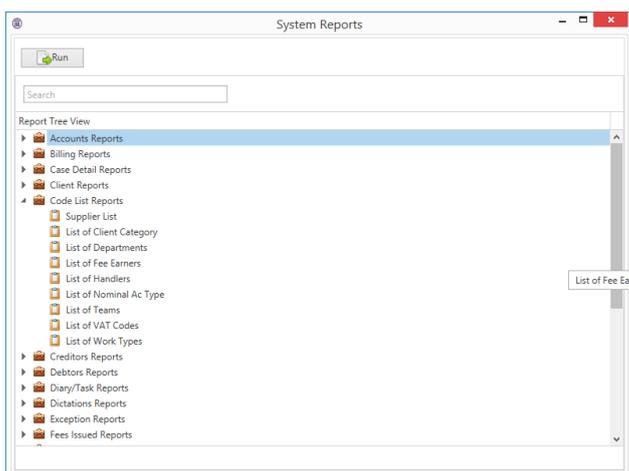
Retire A Work Type

1. Open the **Work Type** Dialogue Box as before.
2. Select the **Work Type** you no longer require and select **Edit**. Tick the **Retired** Box and click **OK**.

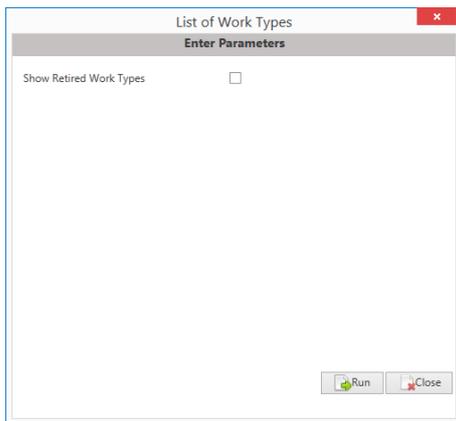
Note: If you have already assigned a work type to a case matter you will not be able to delete that work type.

Print A List of Work Types

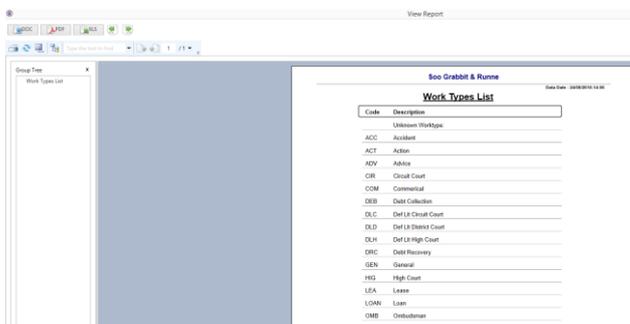
1. Click on the Report Tab and select System Reports
2. Click on the arrow beside Code List Reports



3. Select List of Work Types. The following dialogue box will appear.



4. Tick the Show Retired Work Types if you need to see old work type otherwise just click on Run.



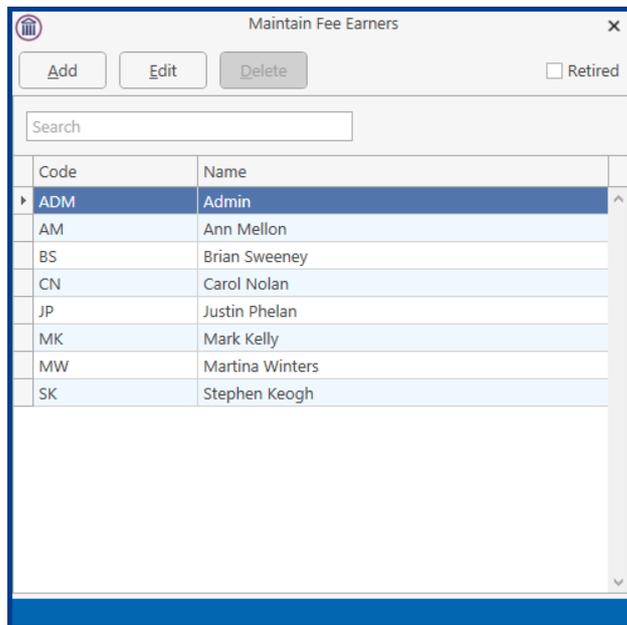
5. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN FEE EARNER CODES

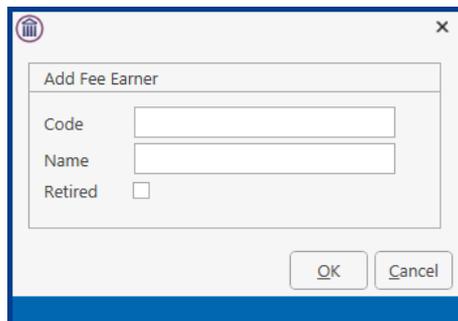
Fee Earners are the people within your firm who generate income.

Add A Fee Earner Code

1. Click **Maintain** from the Tabs
2. Click **Fee Earners** from the Ribbon and the following Dialogue Box appears.



3. Click the **Add** button. The following Dialogue Box appears.



Input their initials in the Code Box

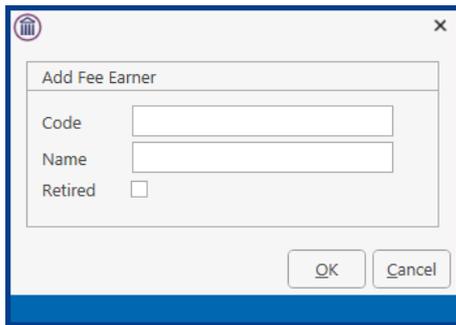
Input the Name in the Name Box

4. Click the **OK** Button and this Fee Earner is available for use.

Amend A Fee Earner Code

1. Open the **Fee Earner** Dialogue Box as before.
2. Select the **Fee Earner** you want to amend

3. Click the **Edit** button. The following Dialogue Box will appear.



4. Make any changes required
4. Click the **OK** button

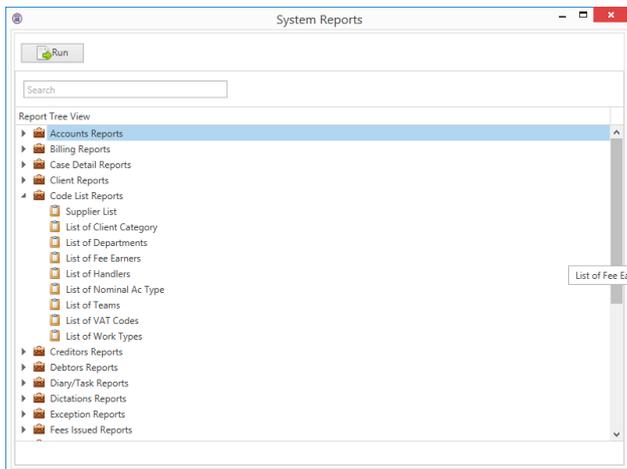
Retire A Fee Earner

1. Open the **Fee Earner** Dialogue Box
2. Select the **Fee Earner** you want to retire and select **Edit**. Tick the **Retired** box. Click **OK**

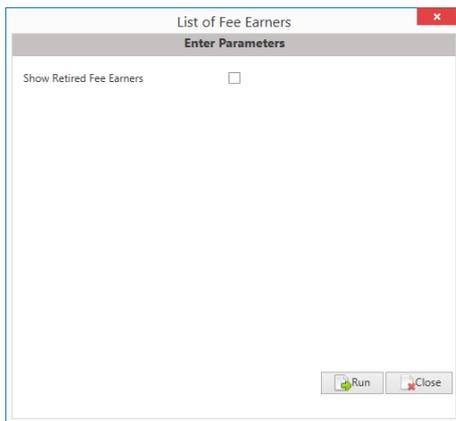
Note: If you have already assigned a Fee Earner to a case matter you will not be able to delete that Fee Earner.

Print A List of Fee Earners

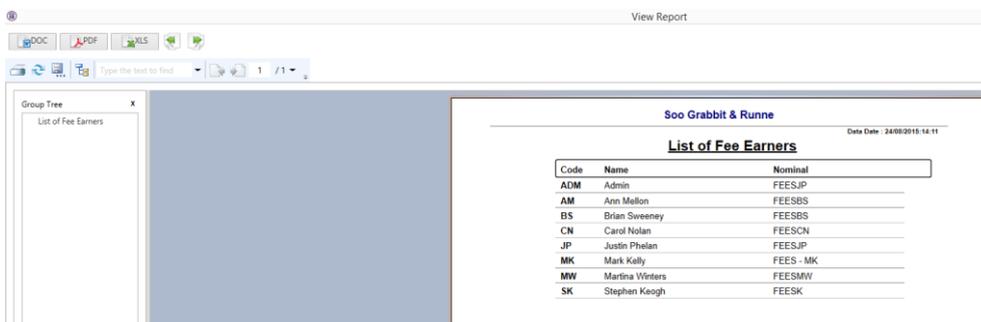
1. Click on the Report Tab and select System Reports
2. Click on the arrow beside Code List Reports



3. Select List of Fee Earners. The following dialogue box will appear



4. Tick the Show Retired Fee Earners if you need to see old fee earners otherwise just click on Run.



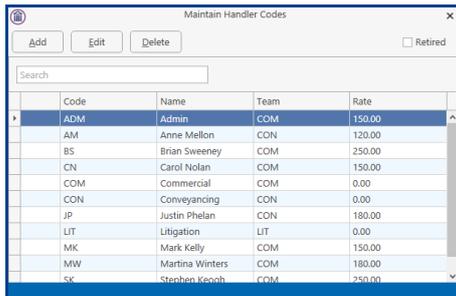
5. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN HANDLERS

Handlers are people who carry out actions in the case diary and may record their time for billing purposes. Each Handler is a member of a team and must specify a Fee Earner Code.

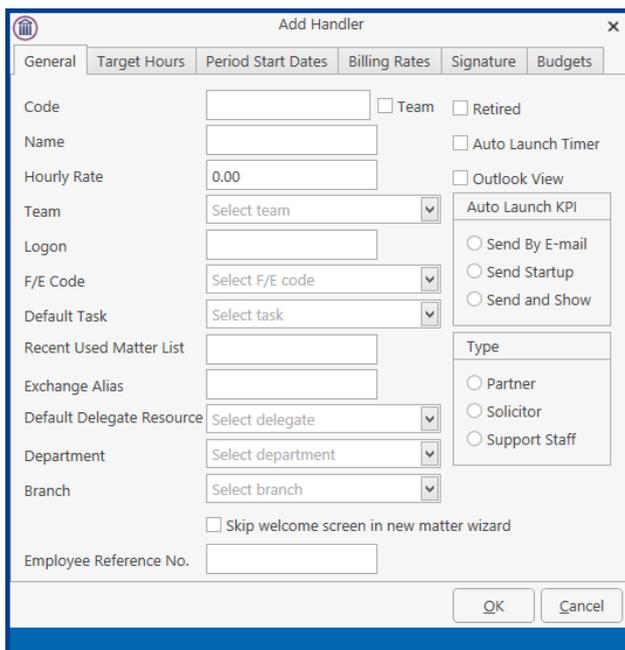
Add A Handler

1. Select **Maintain** from Tabs.
2. Select **Handler** from the Ribbon and the following dialogue box appears.



Code	Name	Team	Rate
ADM	Admin	COM	150.00
AM	Anne Mellon	CON	120.00
BS	Brian Sweeney	COM	250.00
CN	Carol Nolan	COM	150.00
COM	Commercial	COM	0.00
CON	Conveyancing	CON	0.00
JP	Justin Phelan	CON	180.00
LIT	Litigation	LIT	0.00
MK	Mark Kelly	COM	150.00
MW	Martina Winters	COM	180.00
SK	Stephen Kenoh	COM	250.00

3. Click the **Add** button, the following dialogue box appears.



4. Input the following details:
 - Code:** Input two/three letter code e.g. HK for Helen Johnson
 - Name:** Input the name of the handler
 - Retired:** Leave this unchecked until the handler either retires or leaves the firm.
 - Team:** Click on the Down Arrow to reveal a list of teams. Select the applicable team and click the select button.
 - Outlook View:** Ensure that this is checked for the new view of case management.
 - Auto Launch Timer:** If you want the time recording timer to launch automatically pick a tick in this.
 - Hourly Rate:** Input this handler's default hourly rate.
 - Logon:** Input the handler's logon name.

- A/cs F/E Code:** Click the Down Arrow to reveal a list of Fee Earners. Select the appropriate fee earner.
- Default Task:** Click the Down Arrow to reveal a list of tasks. Select the appropriate task.
- Recent Used Matter List:** Input the amount of recently used matters, you want to appear in the recent matter list of this handler.
- Exchange Alias:** Input the Handlers Email account name.
- Default Delegate Resource:** Click on the Down Arrow to reveal a list of handlers. Select the default delegate hander required.
- Department:** Click on the Down Arrow to reveal a list of Departments. Select the appropriate department.
- Type:** Select the appropriate option button for this handler i.e. Solicitor etc.
- Auto Launch KPI:** This is no longer in use.

See an example of a completed window below.

The screenshot shows a 'Change Handler' dialog box with the following fields and options:

- Code:** BS (text input), Team, Retired
- Name:** Brian Sweeney (text input), Auto Launch Timer
- Hourly Rate:** 250.00 (text input), Outlook View
- Team:** COM (dropdown menu)
- Logon:** BRIANS (text input)
- F/E Code:** BS (dropdown menu)
- Default Task:** GEN (dropdown menu)
- Recent Used Matter List:** 30 (text input)
- Exchange Alias:** keyhosuetest@gmail.cc (text input)
- Default Delegate Resource:** (empty dropdown menu)
- Department:** CON (dropdown menu)
- Branch:** Head Office (dropdown menu)
- Skip welcome screen in new matter wizard
- Employee Reference No.:** (empty text input)

On the right side, there are two sections:

- Auto Launch KPI:**
 - Send By E-mail
 - Send Startup
 - Send and Show
- Type:**
 - Partner
 - Solicitor
 - Support Staff

At the bottom, there are 'OK' and 'Cancel' buttons.

5. Click on the **Target Hours** tab. The following window appears.

Month	Target Hours
Month 1	400.00
Month 2	200.00
Month 3	200.00
Month 4	200.00
Month 5	200.00
Month 6	200.00
Month 7	200.00
Month 8	200.00
Month 9	200.00
Month 10	200.00
Month 11	200.00
Month 12	200.00

Input the target hours for this time recorder for month 1. Use the **Fill from Month 1** button to fill in the remaining months with the same amount. Otherwise input individually.

6. Click on the **Period Start Dates** tab. The following window appears.

Month	Period Start Date
1	01 Jan 2015
2	01 Feb 2015
3	01 Mar 2015
4	01 Apr 2015
5	01 May 2015
6	01 Jun 2015
7	01 Jul 2015
8	01 Aug 2015
9	01 Sep 2015
10	01 Oct 2015
11	01 Nov 2015
12	01 Dec 2015

Input the first period date and click on the **Fill from 1** button to fill in the remainder of the dates.

7. Click the **Billing Rate** tab. The following window appears.

The screenshot shows the 'Change Handler' window with the 'Billing Rates' tab selected. The window contains the following fields:

Rate Level Per Hour	
Rate 1	50.00
Rate 2	150.00
Rate 3	250.00
Rate 4	350.00
Rate 5	550.00
Axle Number	0

Below the table is a 'Charge Group' dropdown menu with the text 'Select Charge Group' and a 'Clear' button. At the bottom of the window are 'OK' and 'Cancel' buttons.

- Input the rate levels per hour. Rate 1 is the lowest rate, Rate 5 the highest.
8. Click on the **Signature** tab. The following window appears.

The screenshot shows the 'Change Handler' window with the 'Signature' tab selected. The window contains the following fields:

Signature

Regards

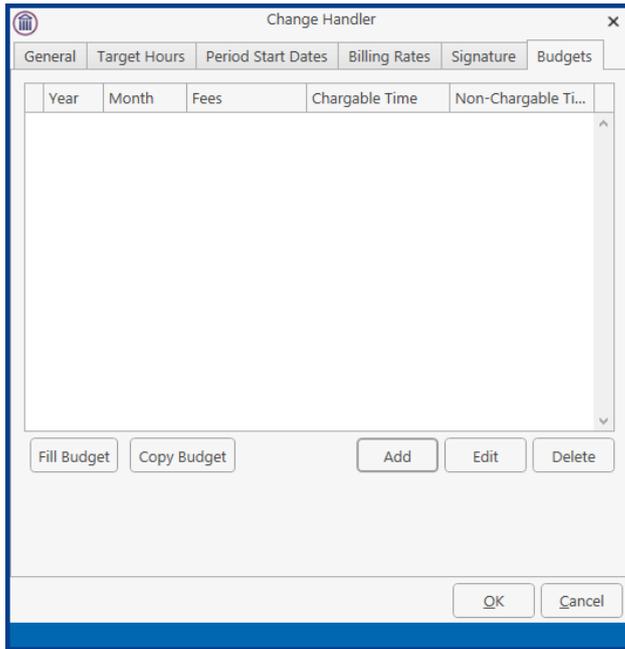
Brian Sweeney

Phone number: 12345

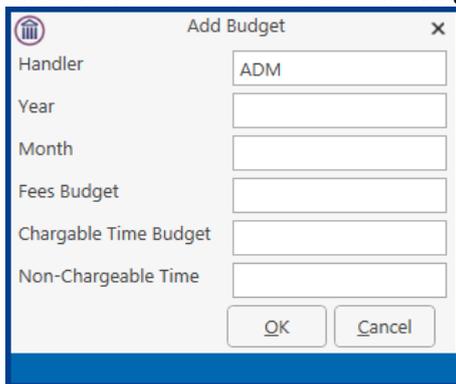
E-Mail: keyhosuetest@gmail.com

At the bottom of the window are 'OK' and 'Cancel' buttons.

- Input a signature in the signature box.
Input an email address in the email box.
9. Click on the **Budgets** tab.



10. Click the Add button and the following dialogue box will appear.



11. On this screen the Handler's annual and monthly budgets can be entered.
12. When complete click the **OK** Button and click **OK** again. This time recorder is now available for use.

Amend A Handler

1. Open the **Handler** Dialogue Box as before.
2. Select the Handler you want to amend.
3. Click the **Edit** button. The following dialogue box will appear.

The screenshot shows the 'Change Handler' dialog box with the following details:

- Code:** BS
- Name:** Brian Sweeney
- Hourly Rate:** 250.00
- Team:** COM
- Logon:** BRIANS
- F/E Code:** BS
- Default Task:** GEN
- Recent Used Matter List:** 30
- Exchange Alias:** keyhosuetest@gmail.cc
- Department:** CON
- Branch:** Head Office
- Employee Reference No.:** (empty)

Options and checkboxes:

- Team
- Retired
- Auto Launch Timer
- Outlook View
- Skip welcome screen in new matter wizard

Auto Launch KPI options:

- Send By E-mail
- Send Startup
- Send and Show

Type options:

- Partner
- Solicitor
- Support Staff

4. Make any changes required and click the **OK** button.

Retire A Team

1. Open the **Handler** dialogue box
2. Select the Handler you want to retire and select **Edit**. Tick the **Retired** box and click OK.

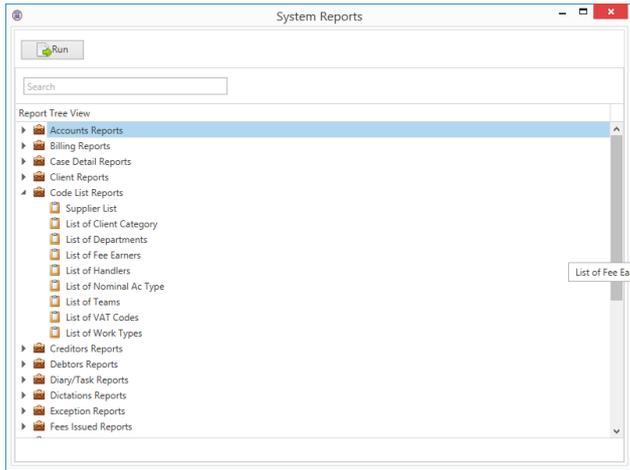
Delete A Team

1. Open the **Handler** dialogue box
2. Select the **Handler** you want to delete.
3. Click the **Delete** button.

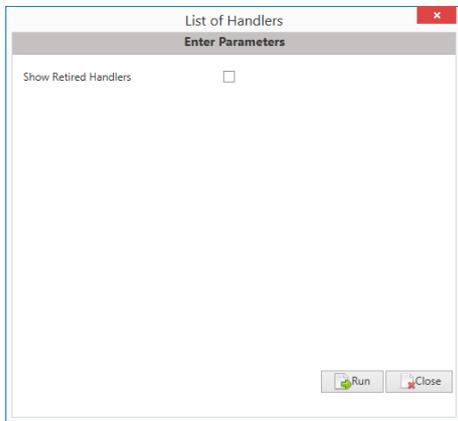
Note: If a Handler is already in use you will not be able to delete it.

Print A List of Handlers

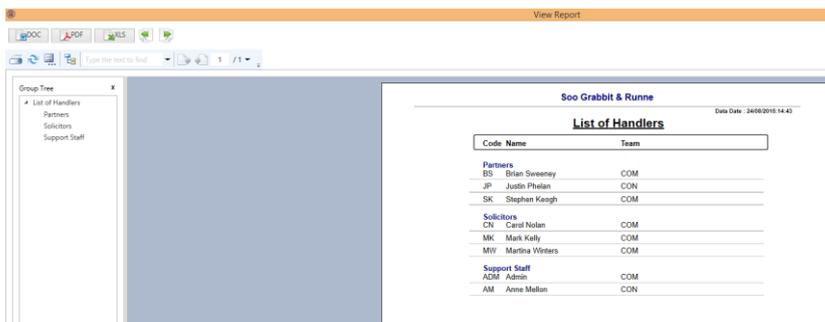
1. Click on the Report Tab and select System Reports
2. Click on the arrow beside Code List Reports



3. Select List of Handlers. The following dialogue box will appear



4. Tick the Show Retired Handlers if you need to see old handlers otherwise just click on Run.



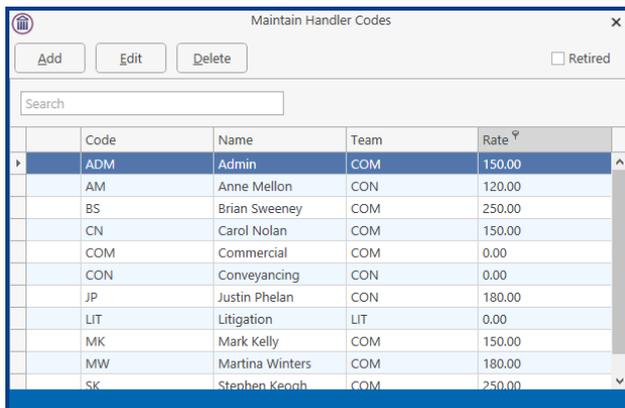
5. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN TEAMS

Teams can be based on groups of Handlers e.g. groups of Fee Earners and/or Support Staff. It is also possible to set default billing rates for the team.

Add A Team

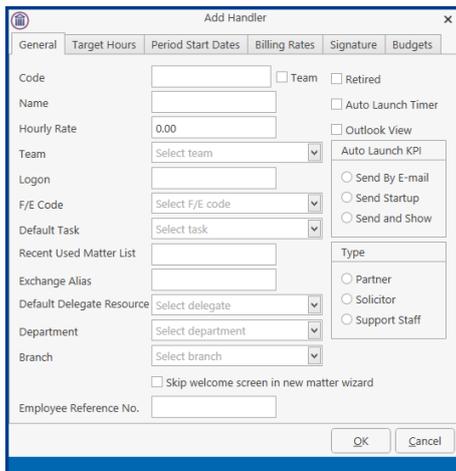
1. Click **Maintain** from the Tabs. Click on **Handlers** and the following dialogue box will appear.



The screenshot shows a window titled "Maintain Handler Codes" with buttons for "Add", "Edit", and "Delete", and a "Retired" checkbox. Below is a search bar and a table with the following data:

	Code	Name	Team	Rate
▶	ADM	Admin	COM	150.00
	AM	Anne Mellon	CON	120.00
	BS	Brian Sweeney	COM	250.00
	CN	Carol Nolan	COM	150.00
	COM	Commercial	COM	0.00
	CON	Conveyancing	CON	0.00
	JP	Justin Phelan	CON	180.00
	LIT	Litigation	LIT	0.00
	MK	Mark Kelly	COM	150.00
	MW	Martina Winters	COM	180.00
	SK	Stephen Keogh	COM	250.00

2. Click on the **Add** button, the following dialogue box appears.



The screenshot shows a window titled "Add Handler" with tabs for "General", "Target Hours", "Period Start Dates", "Billing Rates", "Signature", and "Budgets". The "General" tab is active, showing the following fields and options:

- Code: [Text Box] Team Retired
- Name: [Text Box] Auto Launch Timer
- Hourly Rate: 0.00 Outlook View
- Team: [Select team] Auto Launch KPI
- Logon: [Text Box] Send By E-mail
- F/E Code: [Select F/E code] Send Startup
- Default Task: [Select task] Send and Show
- Recent Used Matter List: [Text Box]
- Exchange Alias: [Text Box]
- Default Delegate Resource: [Select delegate]
- Department: [Select department]
- Branch: [Select branch]
- Skip welcome screen in new matter wizard
- Employee Reference No.: [Text Box]

Buttons: OK, Cancel

Input the following details.

- Code:** Input a three letter code for the team
- Team:** Check the team box. The following screen will appear

Handler/Team

Name Box: Input the team name

Hourly Rate: Input a default hourly rate

3. Click the **OK** button and this Team is available for use.

Amend A Team

1. Open the **Handler** Dialogue Box as before.
2. Select the **Team** you want to amend. Click the **Edit** button. Make any changes required.
3. Click the **OK** button.

Retire A Team

1. Open the **Handler** dialogue box
2. Select the Team you want to retire and select **Edit**. Tick the **Retired** box and click OK.

Delete A Team

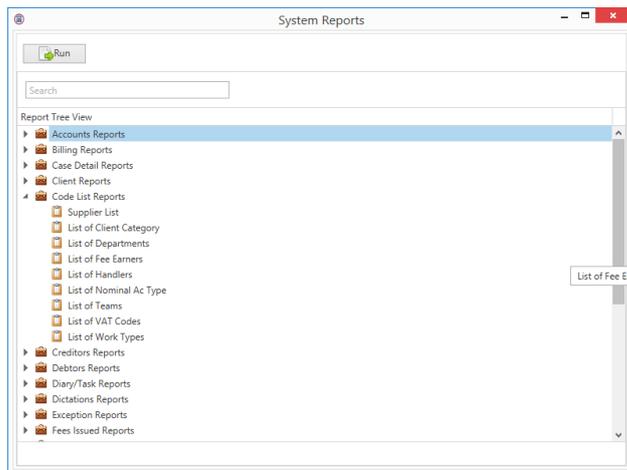
1. **Open** the **Handler** dialogue box
2. Select the **Team** you want to delete.
3. Click the **Delete** button.

Note: If you have already assigned a Team to a case matter you will not be able to delete that Team.

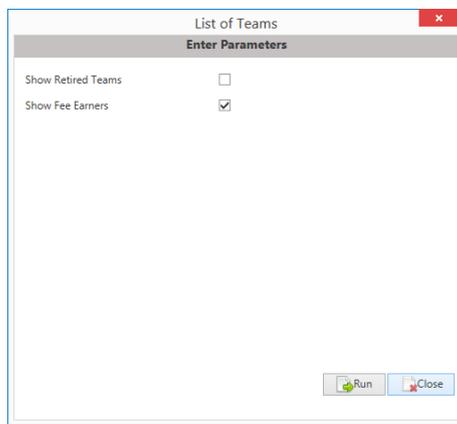
Print A List of Teams

1. Click on the Report Tab and select System Reports

2. Click on the arrow beside Code List Reports



3. Select List of Teams. The following dialogue box will appear.



4. The Show Fee Earners is automatically ticked and will list the fee earners in each team.
5. Tick the Show Retired Teams if you need to see old teams otherwise just click on Run.



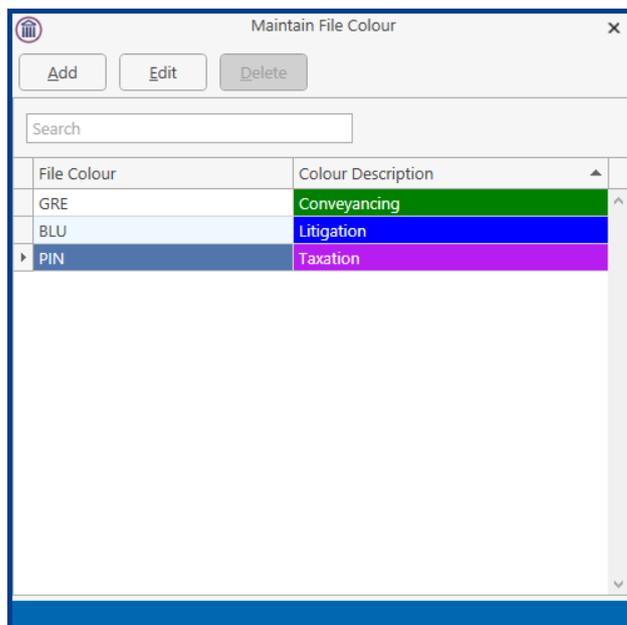
6. The report can be exported to Word, Excel or in a PDF format.

MAINTAIN FILE COLOURS

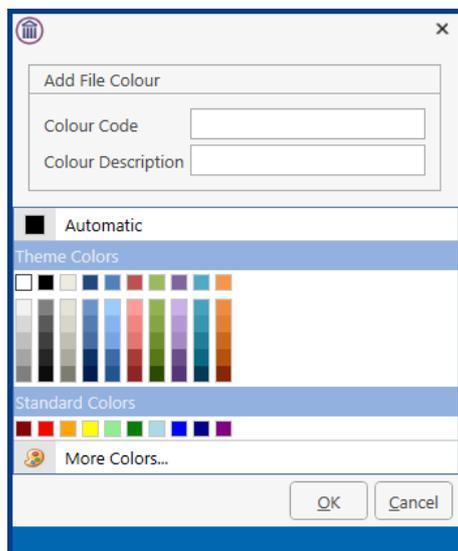
File Colours can be used to colour code file types e.g. all conveyancing files would be blue, all litigation red etc.

Add A File Colour

1. Click **Maintain** from the Tab list.
2. Select **Other Codes** from the Ribbon and then select **File Colour**.



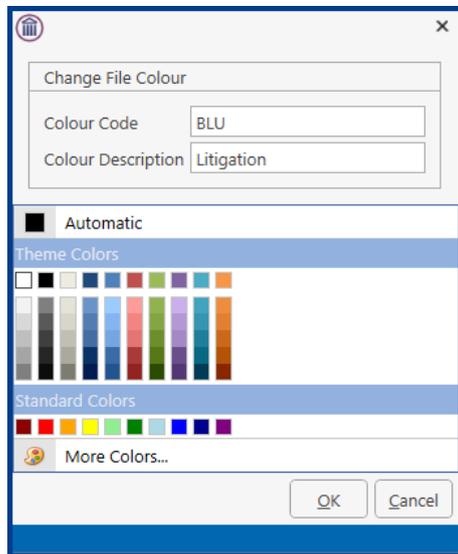
3. Click the **Add** button to add a file colour. The following dialogue box appears.



4. Input a three letter code in the Colour Code box e.g. BLU for Blue
Input a Colour Description in the Colour Description box.
Click the OK button and this file colour is available for use.

Amend A File Colour

1. Open the File Colour dialogue box as before.
2. Select the File Colour you want to amend.
3. Click the Edit button and the following dialogue box will appear.



4. Make the necessary changes and then **select the colour** again.
5. Click on **OK** button.

Delete A File Colour

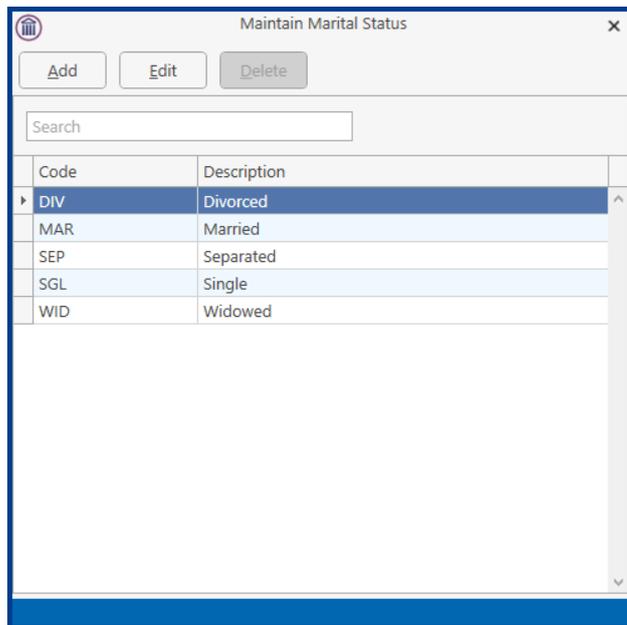
It is not possible to delete a file colour at this time.

MAINTAIN MARITAL STATUS CODES

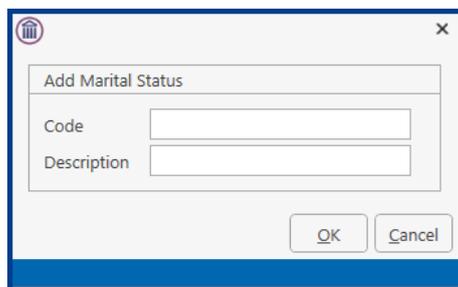
Marital status codes are used when classifying the marital status of a client.

Add A Marital Status Code

1. Click on **Maintain** from the Tabs.
2. Select **Other Codes** from the Ribbon and then select **Marital Codes**.



3. Click the **Add** button to add a Marital Status Code. The following dialogue box appears.



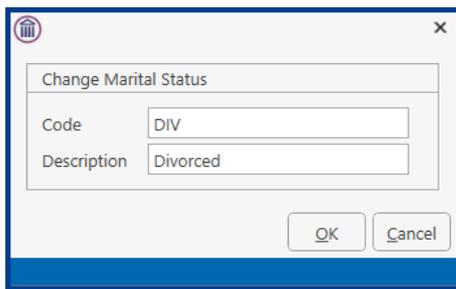
Input a three-letter Code in the Code box e.g. MAR for Married
Input the Description in the Description box.

4. Click the **OK** button and this status code is available for use.

Amend A Marital Status Code

1. Open the **Marital Status** box as before.
2. Select the **Marital Status code** you want to amend.

3. Click the **Edit** button. The following dialogue box will appear.



The image shows a screenshot of a software dialog box titled "Change Marital Status". The dialog box has a standard Windows-style title bar with a close button (X) in the top right corner. Inside the dialog, there are two text input fields. The first field is labeled "Code" and contains the text "DIV". The second field is labeled "Description" and contains the text "Divorced". At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

- Make any changes required.
4. Click the **OK** button.

Delete A Marital Status Code

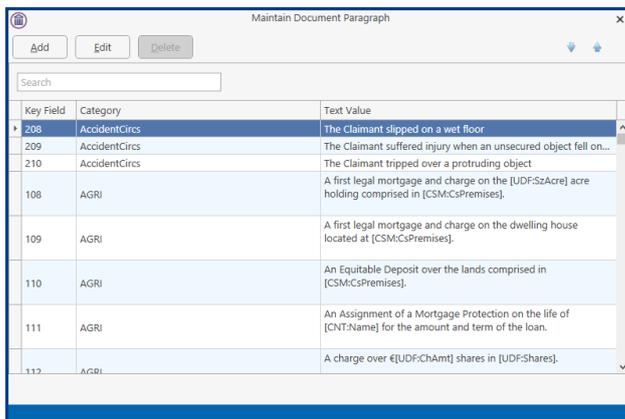
It is not possible to delete a marital code at this time.

MAINTAIN POPUP PARAGRAPH CODES

A PopUp paragraph can be used where the precedent may differ on language depending on the Matter details, e.g. special conditions. If you code for a PopUp paragraph you are giving the user the option to select the exact type of paragraph they require. It is possible to set up the PopUp paragraphs so the user can select one or multiple paragraphs in the letter\document.

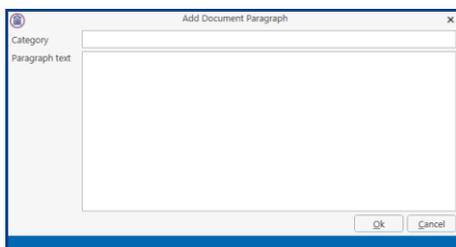
Add A PopUp Paragraph Code

1. Click on **Maintain** from the Tabs.
2. Select **Other Codes** from the Ribbon and then select **PopUp Paragraph**.



Key Field	Category	Text Value
208	AccidentCircs	The Claimant slipped on a wet floor
209	AccidentCircs	The Claimant suffered injury when an unsecured object fell on...
210	AccidentCircs	The Claimant tripped over a protruding object
108	AGRI	A first legal mortgage and charge on the [UDF:SzAcre] acre holding comprised in [CSM:CsPremises].
109	AGRI	A first legal mortgage and charge on the dwelling house located at [CSM:CsPremises].
110	AGRI	An Equitable Deposit over the lands comprised in [CSM:CsPremises].
111	AGRI	An Assignment of a Mortgage Protection on the life of [CNT:Name] for the amount and term of the loan.
112	AGRI	A charge over €[UDF:ChAmt] shares in [UDF:Shares].

3. Click the **Add** button to add a PopUp Code. The following dialogue box appears.



The dialog box has a title bar 'Add Document Paragraph'. It contains a 'Category' label and a text input field. Below it is a 'Paragraph text' label and a larger text area for input. At the bottom right are 'OK' and 'Cancel' buttons.

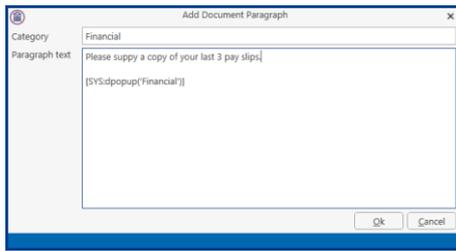
The system will generate a **Key Field** automatically
Input a Category in the Category box e.g. Financial
Type the required text in the Paragraph text box.

4. Click the **OK** button and this paragraph text is available for use.

Multiple Paragraph Option

1. Open the **Add Document Paragraph** dialogue box as before.
2. Add the **category** and type the **description**

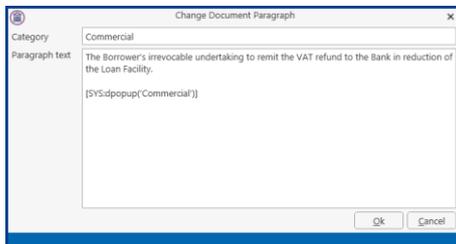
3. Enter the code **[SYS:dpopup('xxx')]**.



4. Click the **OK** button and the PopUp paragraph is now available for use.

Amend A PopUp Paragraph Code

1. Open the **PopUp Paragraph** box as before.
2. Select the **PopUp Paragraph code** you want to amend.
3. Click the **Edit** button. The following dialogue box will appear.



Make any changes required.

4. Click the **OK** button.

Delete A PopUp Paragraph Code

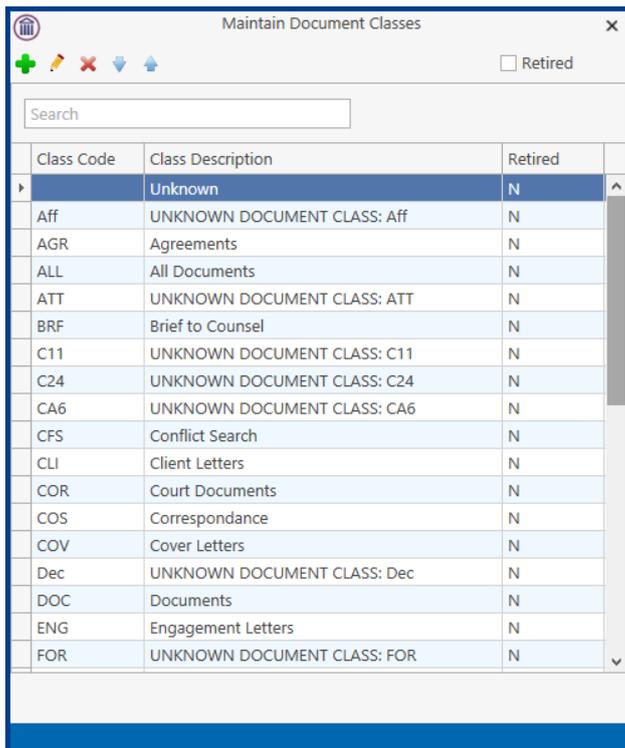
PopUp Paragraphs cannot be deleted at this time.

MAINTAIN DOCUMENT CLASS CODES

Add A Document Class Code

Document Class codes are used to classify document based on the type of document. This is important when using the Brief Builder Module to ensure all document appear in the correct section.

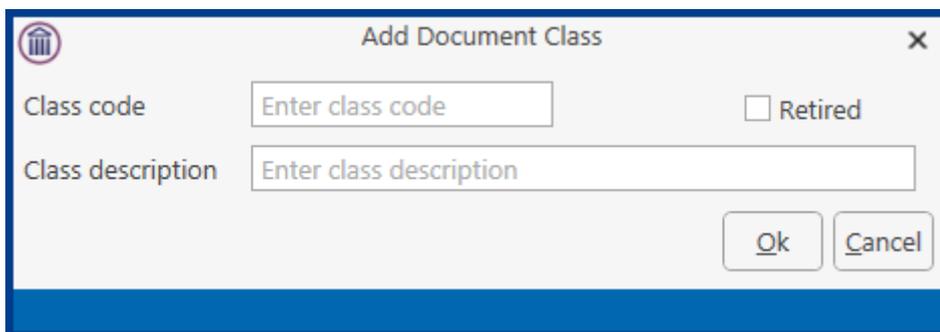
1. Click on **Maintain** from the Tabs.
2. Select **Other Codes** from the Ribbon and then select **Document Class Codes**.



The screenshot shows a window titled "Maintain Document Classes" with a search bar and a table. The table has three columns: "Class Code", "Class Description", and "Retired". The "Retired" column contains "N" for all entries. The "Class Description" column contains various document types, including "Unknown", "Aff", "AGR", "ALL", "ATT", "BRF", "C11", "C24", "CA6", "CFS", "CLI", "COR", "COS", "COV", "Dec", "DOC", "ENG", and "FOR".

Class Code	Class Description	Retired
	Unknown	N
Aff	UNKNOWN DOCUMENT CLASS: Aff	N
AGR	Agreements	N
ALL	All Documents	N
ATT	UNKNOWN DOCUMENT CLASS: ATT	N
BRF	Brief to Counsel	N
C11	UNKNOWN DOCUMENT CLASS: C11	N
C24	UNKNOWN DOCUMENT CLASS: C24	N
CA6	UNKNOWN DOCUMENT CLASS: CA6	N
CFS	Conflict Search	N
CLI	Client Letters	N
COR	Court Documents	N
COS	Correspondance	N
COV	Cover Letters	N
Dec	UNKNOWN DOCUMENT CLASS: Dec	N
DOC	Documents	N
ENG	Engagement Letters	N
FOR	UNKNOWN DOCUMENT CLASS: FOR	N

3. Click the **Add** button to add a Marital Status Code. The following dialogue box appears.



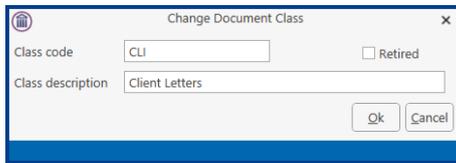
The screenshot shows a dialog box titled "Add Document Class" with two input fields: "Class code" and "Class description". The "Class code" field contains the placeholder text "Enter class code" and the "Class description" field contains the placeholder text "Enter class description". There is a "Retired" checkbox which is unchecked. At the bottom right, there are "Ok" and "Cancel" buttons.

Input a three-letter Code in the Code box e.g. CLI for Client Letters
Input the Description in the Description box.

4. Click the **OK** button and this document code is available for use.

Amend A Document Class Code

1. Open the **Document Class** box as before.
2. Select the **Marital Status code** you want to amend.
3. Click the **Edit** button. The following dialogue box will appear.



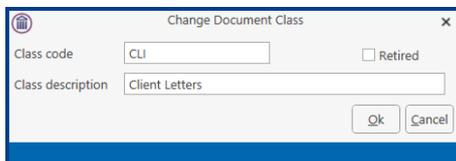
The screenshot shows a dialog box titled "Change Document Class". It has a close button (X) in the top right corner. The "Class code" field contains the text "CLI". To the right of this field is a checkbox labeled "Retired", which is currently unchecked. Below the "Class code" field is the "Class description" field, which contains the text "Client Letters". At the bottom right of the dialog box are two buttons: "Ok" and "Cancel".

Make any changes required.

4. Click the **OK** button.

Retire A Document Class Code

1. Double click on the code to be retired. The following dialogue box will appear.



This screenshot is identical to the previous one, showing the "Change Document Class" dialog box. The "Class code" is "CLI" and the "Class description" is "Client Letters". The "Retired" checkbox is now checked, indicating that the class code is being retired.

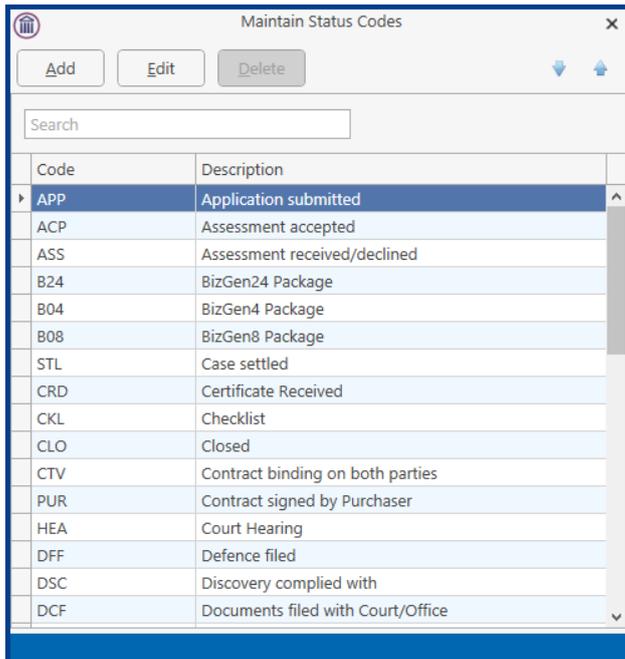
2. Tick the Retired box and then click OK.

MAINTAIN STATUS CODES

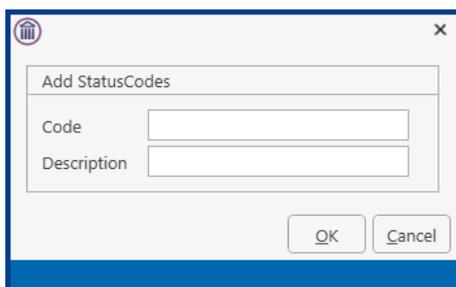
Add A Document Class Code

Status Codes can be associated with work flow actions. They give you an updated case status when an action has been completed e.g. contract signed by purchaser.

1. Click on **Maintain** from the Tabs.
2. Select **Other Codes** from the Ribbon and then select **Status Codes**.



3. Click the **Add** button to add a Status Code. The following dialogue box appears.



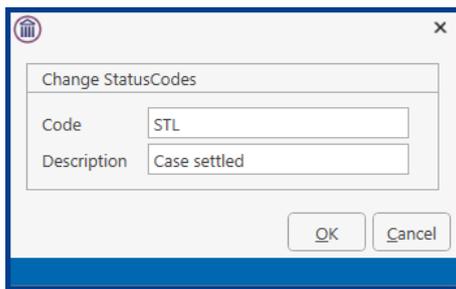
Input a three-letter Code in the Code box e.g. STL for Case Settled.
Input the Description in the Description box.

4. Click the **OK** button and this document code is available for use.

Amend A Status Code

1. Open the **Status Code** box as before.
2. Select the **Status code** you want to amend.

3. Click the **Edit** button. The following dialogue box will appear.



- Make any changes required.
4. Click the **OK** button.

Delete A Status Code

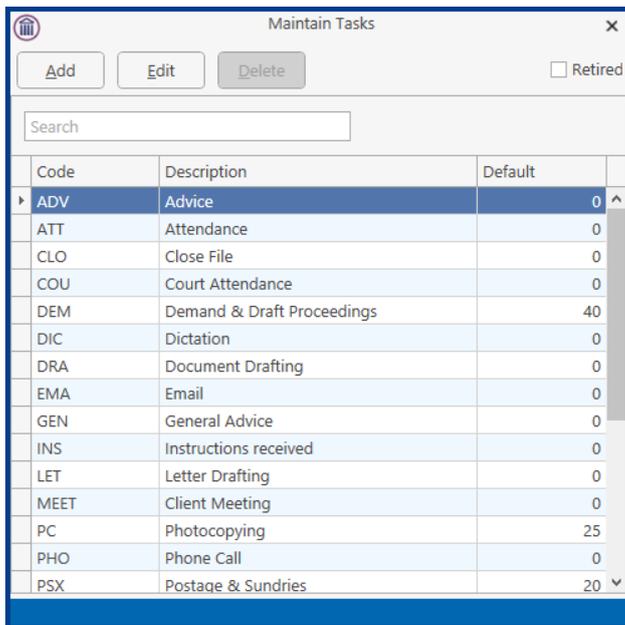
It is not possible to delete a Status Code at this time.

MAINTAIN TASKS

Tasks are general activities performed by handlers e.g. letter writing, file review etc.

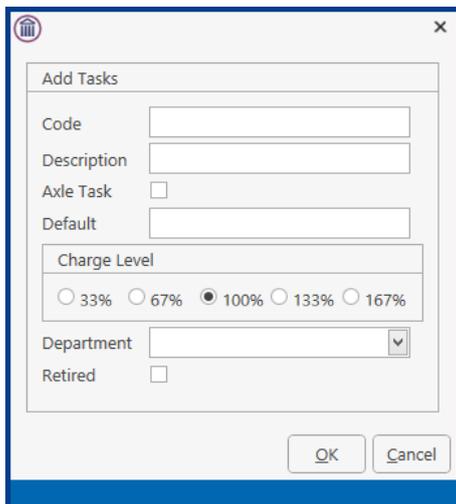
Add A Task

1. Click **Maintain** from the Tabs.
2. Click **Other Codes** and then select **Tasks**. The following dialogue box appears.



Code	Description	Default
ADV	Advice	0
ATT	Attendance	0
CLO	Close File	0
COU	Court Attendance	0
DEM	Demand & Draft Proceedings	40
DIC	Dictation	0
DRA	Document Drafting	0
EMA	Email	0
GEN	General Advice	0
INS	Instructions received	0
LET	Letter Drafting	0
MEET	Client Meeting	0
PC	Photocopying	25
PHO	Phone Call	0
PSX	Postage & Sundries	20

3. Click the **Add** button to add a Task. The following dialogue box appears.



Add Tasks

Code

Description

Axle Task

Default

Charge Level

33% 67% 100% 133% 167%

Department

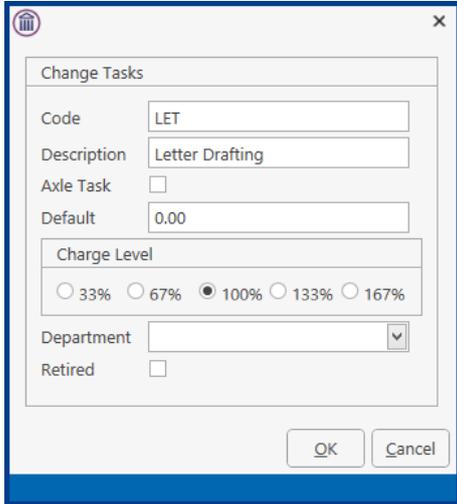
Retired

OK Cancel

- Input a three/four letter code in the Code Box e.g. Ltr for Letter.
Input the Description in the Description box
Input the default price in the default box if required.
Use the Option Buttons provided to select the charge level applicable.
Use the Drop down to select a specific department if required.
4. Click the **OK** button and this Task is available for use.

Amend A Task

1. Open the **Task** dialogue box as before.
2. Select the **Task** you want to amend.
3. Click the **Edit** button. The following dialogue box will appear.



- Make any changes required.
4. Click the **OK** button.

Retire A Task

1. Open the **Task** dialogue box as before.
2. **Select** the Task you want to retire and click on the **Edit** button.
3. Tick the **Retired** box and click **OK**.

Note: When you retire a task it will not affect any uncompleted items. However, it will stop it being selected again

Print A List Of Tasks

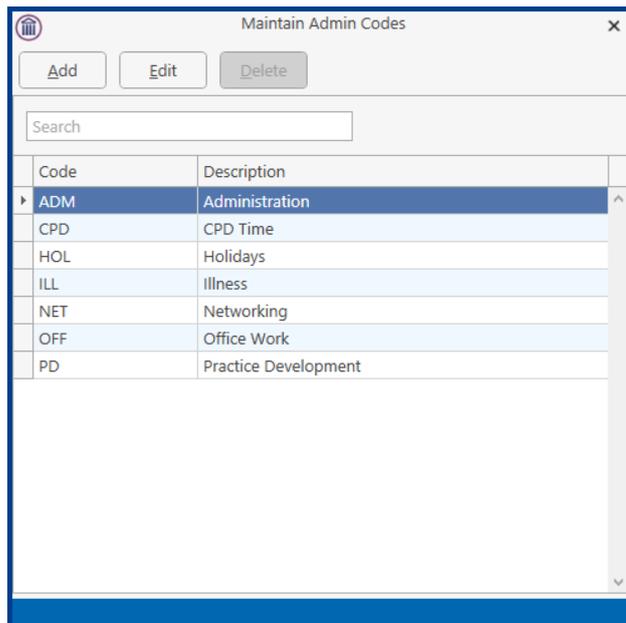
It is not possible to delete a task at his time.

MAINTAIN ADMIN CODES

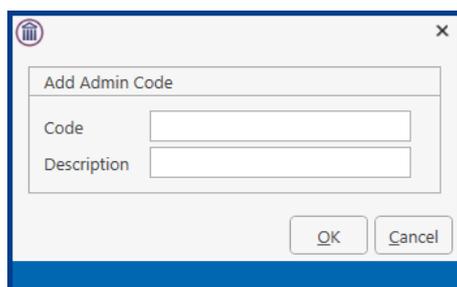
Admin Codes are used to record administrative time; this is non-chargeable time e.g. sick leave, compassionate leave etc.

Add An Administration Code

1. Click **Maintain** from the Tabs.
2. Click **Other Codes** and then select **Admin Codes**. The following dialogue box appears.



3. Click the **Add** button to add an Admin Code. The following dialogue box appears.



Input a three letter code in the Code box e.g. Hol for Holidays.

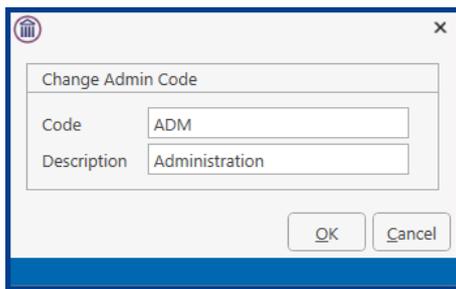
Input the Description in the Description box.

4. Click the **OK** button and this code is available for use.

Amend An Administrative Code

1. Open the **Admin Code** dialogue box as before.
2. Select the Admin Code you want to amend

3. Click the **Edit** button. The following dialogue box will appear.



- Make any changes required.
4. Click the **OK** button.

Delete An Admin Code

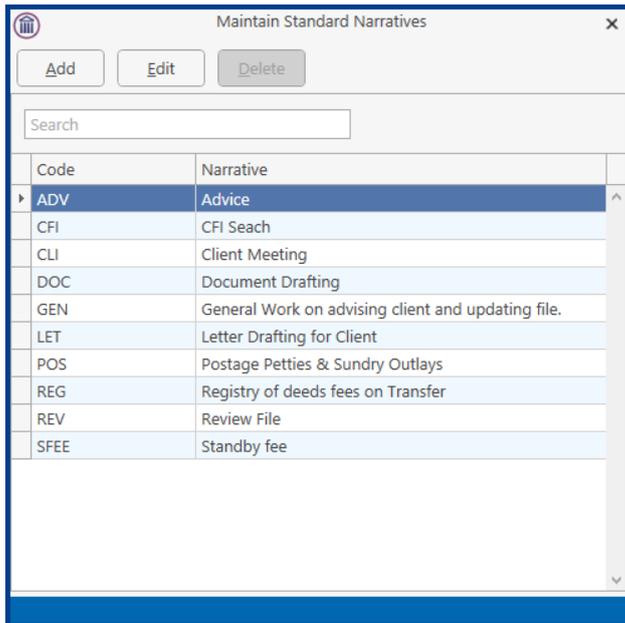
It is not possible to delete an admin code at this time.

MAINTAIN STANDARD NARRATIVES

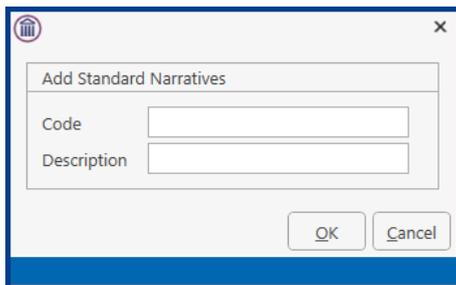
Standard narratives are used in conjunction with time recording; they are used to add further explanations to a time slip.

Add A Standard Narrative

1. Click **Maintain** from the Tabs.
2. Click **Other Codes** and then select **Standard Narratives**. The following dialogue box appears.



3. Click the **Add** button to add a standard narrative. The following dialogue box appears.



Input a three letter Code in the Code box.

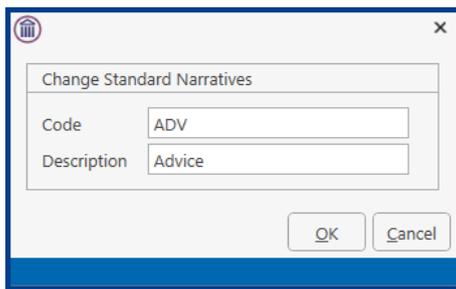
Input the Narrative in the Description box.

4. Click the **OK** button and this narrative is available for use.

Amend a Standard Narrative

1. Open the **Standard Narrative** dialogue box as before.
2. Select the Standard Narrative you want to amend.

3. Click the **Edit** button. The following dialogue box will appear.



- Make any changes required.
4. Click the **OK** button.

Delete A Standard Narrative

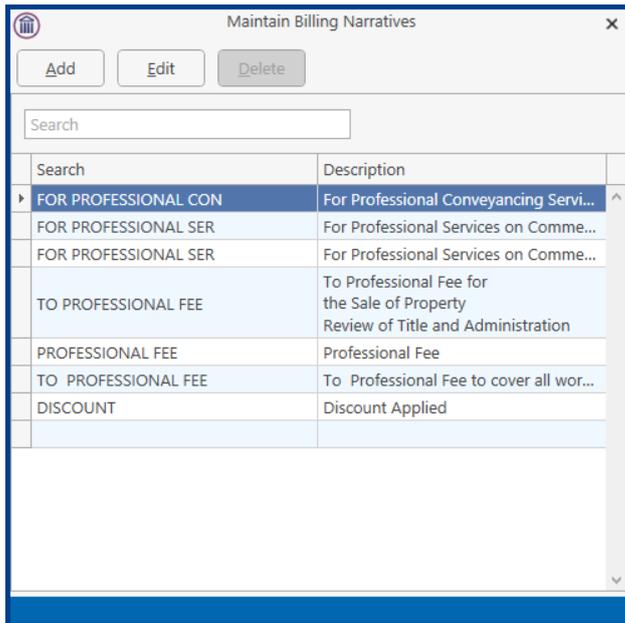
It is not possible to delete a standard narrative at this time.

MAINTAIN BILLING NARRATIVES

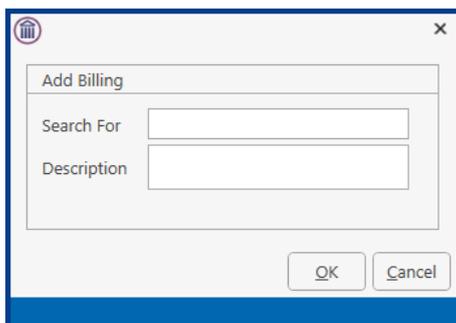
Billing narratives are used in conjunction with Draft Billing; they are used to add further explanation to a billing entry.

Add A Billing Narrative

1. Click **Maintain** from the Tabs.
2. Click **Other Codes** and then select **Billing Narratives**. The following dialogue box appears.



3. Click the **Add** button to add a billing narrative. The following dialogue box appears.

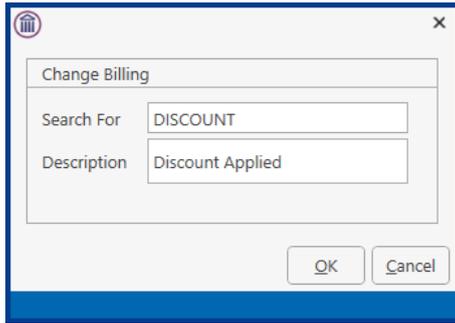


Input the Billing Description in the Description box
Input a search code e.g. PROF for Professional Fees

4. Click the **OK** button and this billing narrative is available for use.

Amend A Billing Narrative

1. Open the **Billing Narrative** dialogue box as before.
2. Select the Billing Narrative you want to amend.



3. Click the **Edit** button. The following dialogue box will appear. Make any changes required
4. Click the **OK** button.

Delete A Billing Narrative

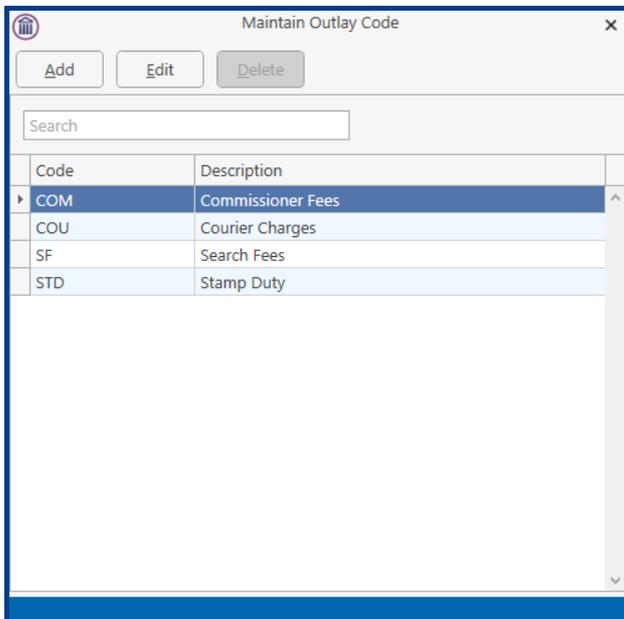
It is not possible to delete a billing narrative at this time.

MAINTAIN OUTLAY CODES

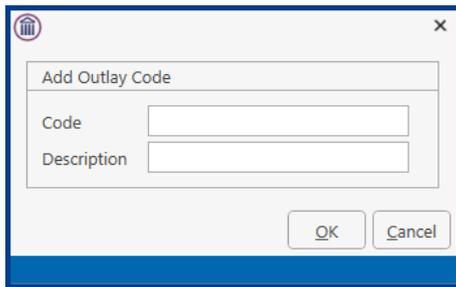
Outlay Codes are used in conjunction with Cheque Requisitions and allow the user to group Outlays if required. This in turn facilitates the grouping of Outlays in the Billing Guide.

Add An Outlay Code

1. Click **Maintain** from the Tabs.
2. Click **Other Codes** and then select **Outlay Code**. The following dialogue box appears.



3. Click the **Add** button to add an outlay code. The following dialogue box appears.
- 4.

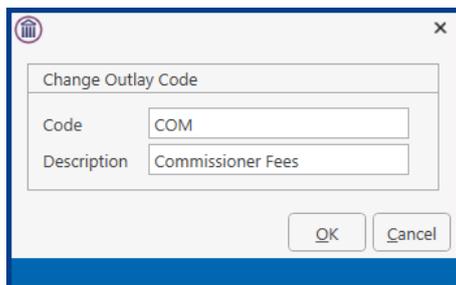


Input the Outlay Code in the Description box
Input a search code e.g. MRPT for Medical Report

5. Click the OK button and this billing narrative is available for use.

Amend An Outlay Code

1. Open the **Outlay Codes** dialogue box as before.
2. Select the outlay code you want to amend.



3. Click the **Edit** button. The following dialogue box will appear.
Make any changes required
4. Click the **OK** button.

Delete An Outlay Code

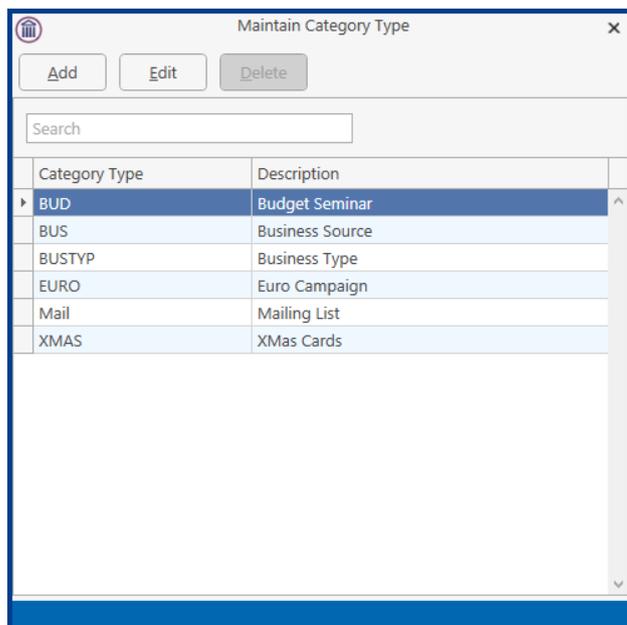
It is not possible to delete a billing narrative at this time.

MAINTAIN CATEGORY TYPES

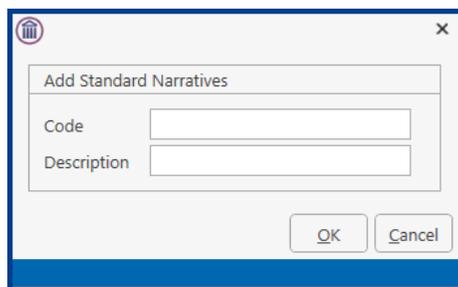
Category types enable the categorising of clients to enable specific types of contact with the client.

Add A Category Type

1. Click **Maintain** from the Tabs.
2. Click **Other Codes** and then select **Category Type**. The following dialogue box appears.



3. Click the **Add** button to add a category type. The following dialogue box appears.



Input a three letter Code in the Code box.

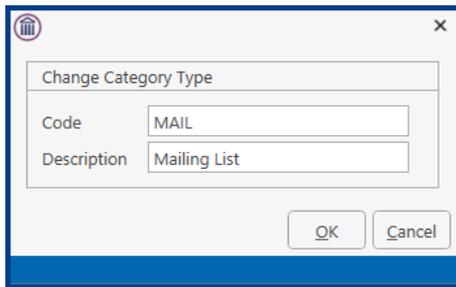
Input the Narrative in the Description box.

4. Click the **OK** button and this narrative is available for use.

Amend a Category Type

1. Open the **Category Type** dialogue box as before.
2. Select the Category Type you want to amend.

3. Click the **Edit** button. The following dialogue box will appear.



4. Make any changes required.
4. Click the **OK** button.

Delete A Category Type

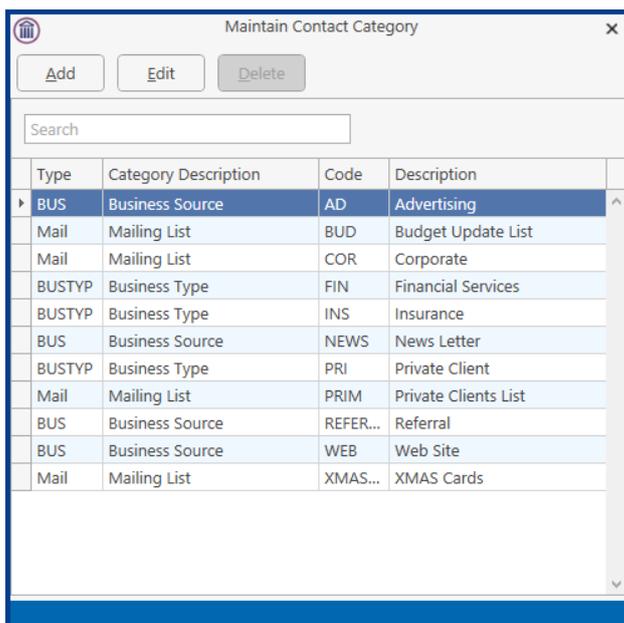
It is not possible to delete a category type at this time.

MAINTAIN CONTACT CATEGORIES

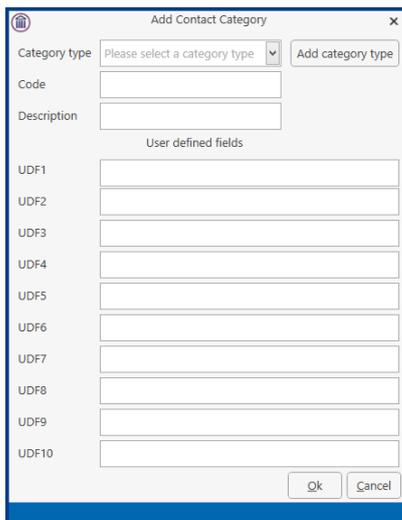
It is possible to categorise your client and create different types of mailing lists. You may want to create a mailing list of clients to received information on changes in the Tax Code or a list of clients to receive a News Letter. It is also possible to add User Defined Fields to the Contact Category.

Create a Contact Category

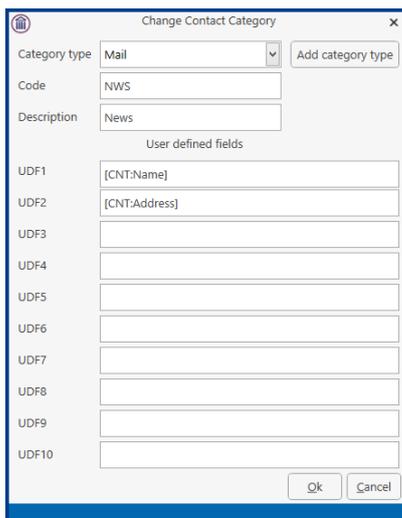
1. Go to the Setup Tab and open the [Document Assist](#) Window (see Guide to The Document Assist) if required.
2. Click **Maintain** from the Tabs.
3. Select Contact Categories from the Ribbon and the following dialog box will appear.



4. Click Add button to add a new Contact Category and the following dialog box will appear.



5. Select the Category Type or select Add category type to add a new category as detailed above.
6. Enter a Code and Description.
7. Using the Document Assist enter the [UDF fields](#) required. (See Creating User Defined Fields).



8. Click OK when finished.

Delete A Contact Category

It is not possible to delete a category type at this time.

PART 2: MAINTAIN USER SECURITY

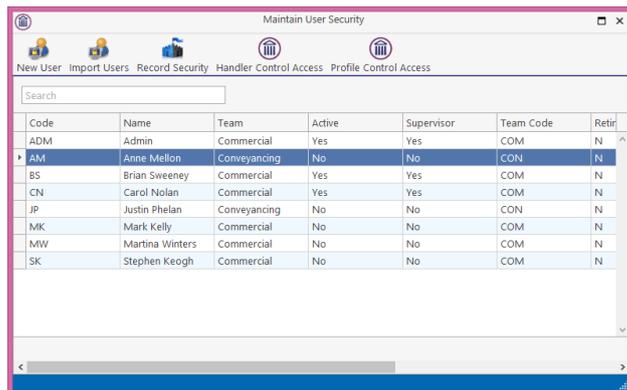
USER ACCESS

User access levels can be restricted and controlled. This allows for greater system security.

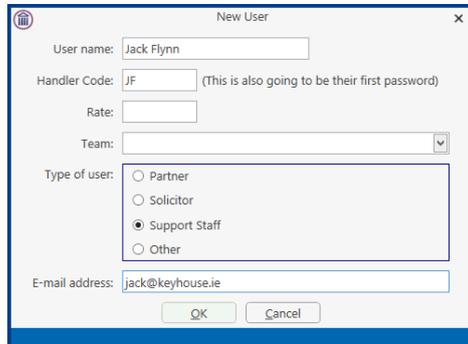
Create New User

A new user can be set up for the User Setup Screen

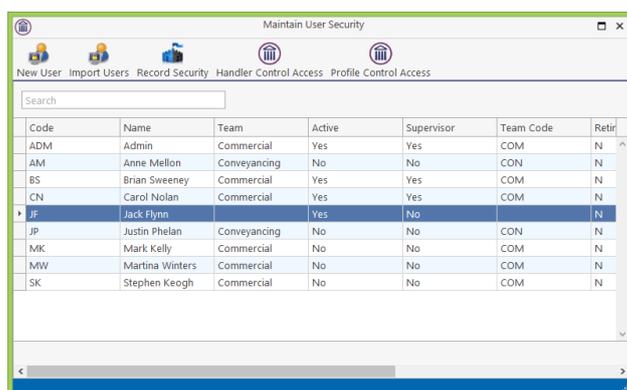
1. Go to the Setup Tab and select User Setup



2. Select New User.
3. Enter the required information. The Handler code is usually their initials.



4. Click OK.
5. As only limited information can be added at this point it may be necessary to use the Handler Option on the Maintain Ribbon to add the remaining details.



Import User

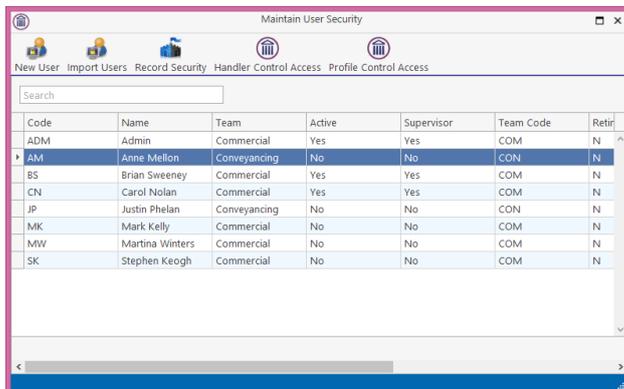
When a user has been set up using the Handler Option on Maintain Tab, it will not visible in the list of users in the User Setup. Use the Import User option to add the name to the list.

1. Go to the Setup Tab and select User Setup.
2. Click on Import User and the User Name will appear in the list of Users.

Activate Handler

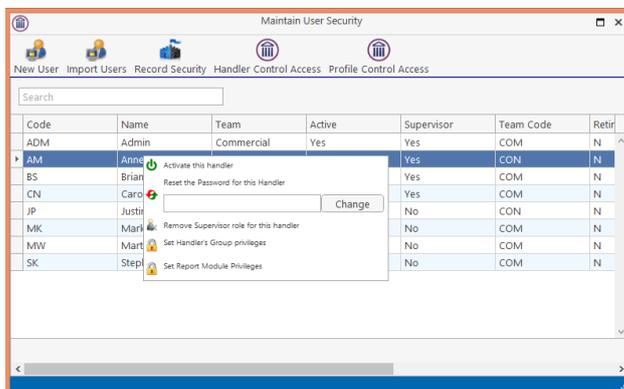
When a User has been set up using the Handler Option on the Maintain Tab, they need to be given access to the system and their password needs to be set. If a user is set up using the New User Option then they are automatically activated.

1. Go to the Setup Tab and select User Setup



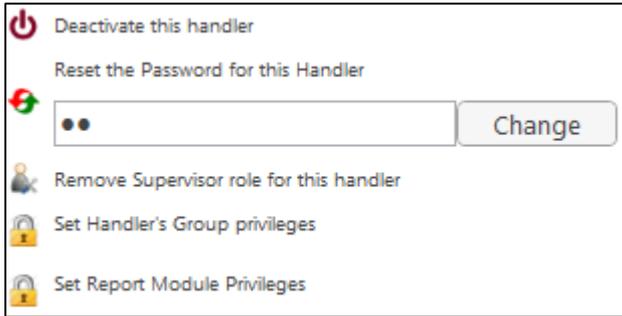
Code	Name	Team	Active	Supervisor	Team Code	Retir
ADM	Admin	Commercial	Yes	Yes	COM	N
AM	Anne Mellon	Conveyancing	No	No	CON	N
BS	Brian Sweeney	Commercial	Yes	Yes	COM	N
CN	Carol Nolan	Commercial	Yes	Yes	COM	N
JP	Justin Phelan	Conveyancing	No	No	CON	N
MK	Mark Kelly	Commercial	No	No	COM	N
MW	Martina Winters	Commercial	No	No	COM	N
SK	Stephen Keogh	Commercial	No	No	COM	N

2. Right click on the User to be change.



Code	Name	Team	Active	Supervisor	Team Code	Retir
ADM	Admin	Commercial	Yes	Yes	COM	N
AM	Anne Mellon	Conveyancing	No	No	CON	N
BS	Brian Sweeney	Commercial	Yes	Yes	COM	N
CN	Carol Nolan	Commercial	Yes	Yes	COM	N
JP	Justin Phelan	Conveyancing	No	No	CON	N
MK	Mark Kelly	Commercial	No	No	COM	N
MW	Martina Winters	Commercial	No	No	COM	N
SK	Stephen Keogh	Commercial	No	No	COM	N

3. Click Deactivate this Handler and it will change to Activate this Handler
4. In the Change Password Box enter the User's password (usually their initials) and click Change.
5. Click Make this Handler a Supervisor if the user is to have Administration rights.



6. Click on the X in the top right of the Dialog Box to close the screen.

NOTE: The user will need to log on using the option and then complete the log in procedure. This will only need to be done the first time the User logs in.



Security Groups

Security Groups give the ability to limit access to Clients and Matters. This will help ensure confidentiality.

Set Up New Group

1. Go to the Setup Tab and select User Setup.
2. Select Record Security

Group ID	Group Name	In Use	Applied To Matter	Applied To Handl...
1	Family Law	True	True	False
2	Conveyancing	True	True	False
3	Litigation	True	True	False
4	Criminal	True	False	False
5		True	False	False
6		False	False	False
7		False	False	False
8		False	False	False
9		False	False	False
10		False	False	False
11		False	False	False
12		False	False	False
13		False	False	False
14		False	False	False
15		False	False	False
16		False	False	False
17		False	False	False
18		False	False	False
19		False	False	False

3. Select the next line and enter the name of the Group

Group ID	Group Name	In Use	Applied To Matter	Applied To Handl...
1	Family Law	True	True	False
2	Conveyancing	True	True	False
3	Litigation	True	True	False
4	Criminal	True	False	False
5	Private Clients	True	False	False
6		False	False	False
7		False	False	False
8		False	False	False
9		False	False	False
10		False	False	False
11		False	False	False
12		False	False	False
13		False	False	False
14		False	False	False
15		False	False	False
16		False	False	False
17		False	False	False
18		False	False	False
19		False	False	False

4. Continue entering the groups and then close the screen.
5. Users will then need be assigned to the groups.

Add a User to a Group

Once the groups have been defined and added to the system, users can then be added to specific or all groups.

1. Go to the Setup Tab and select User Setup.
2. Right click on the required User and click Set Handler's Group privileges

Code	Name	Team	Active	Supervisor	Team Code	Retir
ADM	Admin	Commercial	Yes	Yes	COM	N
AM	Anne Mellon	Conveyancing	No	Yes	CON	N
BS	Brian Sweeney	Commercial	Yes	Yes	COM	N
CN	Carol Nolan	Commercial	Yes	Yes	COM	N
GC	Gera			No	CON	N
JP	Justi			No	CON	N
MK	Mark			No	COM	N
MW	Mart			No	COM	N
SK	Step					

3. Ticks the boxes to give access to the specific groups
4. Repeat the process for each user.
5. Close the Dialog Box once finished.

NOTE: Supervisor Access automatically gives full access to all Security Groups.

Handler Control Access

Users, by default, have access to the full Keyhouse system. Different people will require different levels of access e.g. a Fee Earner may need access to System Reports while a member of the Support Staff would not. It is possible to add and remove permission for individual Users.

1. Go to the Setup Tab and select User Setup.
2. Click on Handler Control Access.

Handler	OR All Handlers	Profile	Access Firm Phone Log	Access to Know Your Client	Accounts User	Action Flow Setup	Add Associate Types	AML Approval	Bank Details	Change Client Charge Out Rates	Change Day Book Handler	Change Matter Security Permissions	Discharge Undertaking	Document Asses
All Handlers	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>											
Adrian	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Anne Mellon	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Brian Sweeney	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Carol Nolan	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Geraldine Curran	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Justin Phelan	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Mark Kelly	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Martina Winters	<input type="checkbox"/>		<input checked="" type="checkbox"/>											
Stephen Keogh	<input type="checkbox"/>		<input checked="" type="checkbox"/>											

3. The **OR All Handlers** box is ticked for All Handlers to populate the information across all columns. This must remain ticked.
4. To remove access for a User, delete the tick in the appropriate column.

The Column Headings are:

Access Firm Phone Log:

Controls access to the Phone Log.

Access to Know Your Client:

Controls access to the Know Your Client Section on the Client/Case Screen

Account User:

Controls who can Draft an Invoice, Request a Cheque, see the Accounts Ledger on a matter and view My Invoices and My Cheques on the Search/Open Screen

Access Flow Setup:

Controls who can access to the Case Workflow Setup on the Setup Tab

Add Associate Types:

Controls who can create a new Associate Type

AML Approval:

Controls who can say that AML has been carried out (Tick the AML option on the Current Client Details General Tab or on the Critical Information Screen)

Bank Details:

Controls who can add or edit Bank Details for an Associate.

Can maintain Time Entries belonging to others:

Controls who edit entries on the Time Ledger for other people.

Change Client Charge Out Rates:

Controls who can add or edit Charge Out fees at both the Client and Matter level on the Billing Screens.

Change Day Book Handler:

Controls who can amend time recorded by others on the Time Costing Screen before it is posted.

Change Matter Security Permissions:

Controls who can change the Matter Security Permission e.g. change a matter from one security group to another.

Discharge Undertakings:

Controls who has access to Discharge an Undertaking on the system.

Document Assist:

Controls who has access to the coding structure for Precedent Documents

Maintain Ribbon Bar:

Controls who can see and maintain information contained on the Maintain Ribbon.

Matter Archiving:

Controls who can enter information on the Archive Tab on the Current Case Details e.g. close a matter or enter an Expected Destroy Date.

Partners:

Controls who has access the information on the Partners Ribbon

SAM4:

Controls who can Draft an Invoice, Request a Cheque, see the A/c Ledger on the Client/Case Screen, see My Invoices and My Cheques on the Search/Open Screen

Strong Room:

Controls who can see the Strong Room on the Client/Case Screen and on the Search/Open Screen

System Reports:

Controls who can access the System reports option. Note: Limited access can be given using the Reports Ribbon.

Time Recorders:

Controls who can use the Timer, Post Time, Access the Time Ledger and Time Costing Screen.

Undertakings:

Controls who can create an Undertaking on the Client/Case Screen

User Defined Reports:

Controls who can access reports specifically designed for the company.

Document Search:

Controls who can search for documents using the Document Search on the Search/Open screen

Maintain Undertakings:

Controls who can add, change and delete undertakings.

New Client:

Controls who can set up new Clients on the system.

Precedents:

Controls who can access the Precedents Documents using an Action.

Setup New Case:

Controls access to who can create a new case, copy a case and Disallow New Matters.

Strong Room Maintenance:

Controls who can add, change, remove, withdraw and replace items in the strong room

Time Ledger Maintenance:

Controls who can edit Post Time entries e.g. add comments, change the rate

Time Write Off:

Controls who can write off time on a matter using either the Time Ledger or the Maintain Tab.

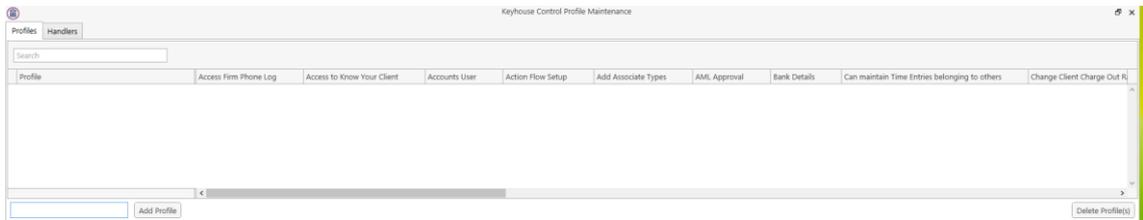
User Administration:

Controls who can set up Users, create Handlers and Fee Earners.

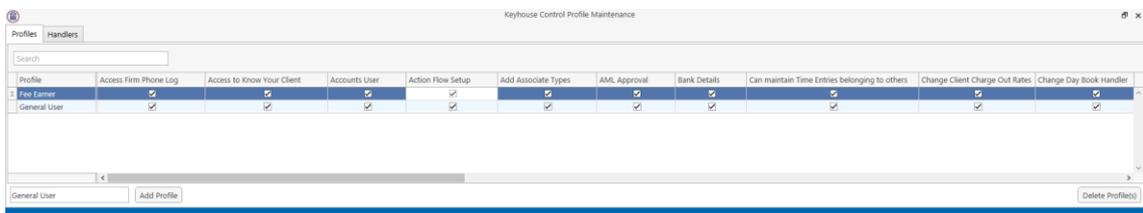
Profile Control Access

When a number of people require the same level of access setting up User Profiles is a quicker and more efficient way of controlling access. The access is granted at the Profile level and people are assigned to the appropriate Profile.

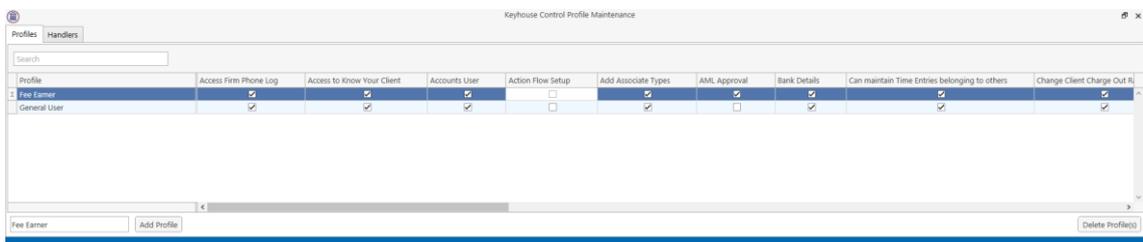
1. Go to the Setup Tab and select User Setup.
2. Click on Profile Control Access.



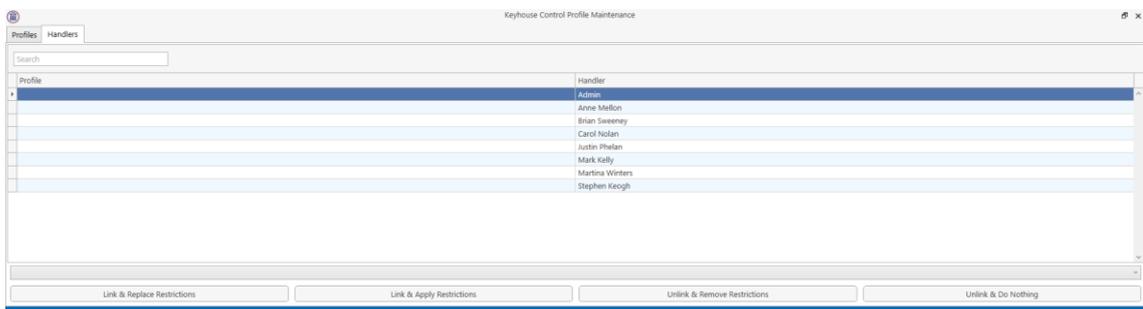
3. In the Add Profile box enter the name of the Profile Group e.g. General User, Fee Earner etc.
4. Click Add Profile



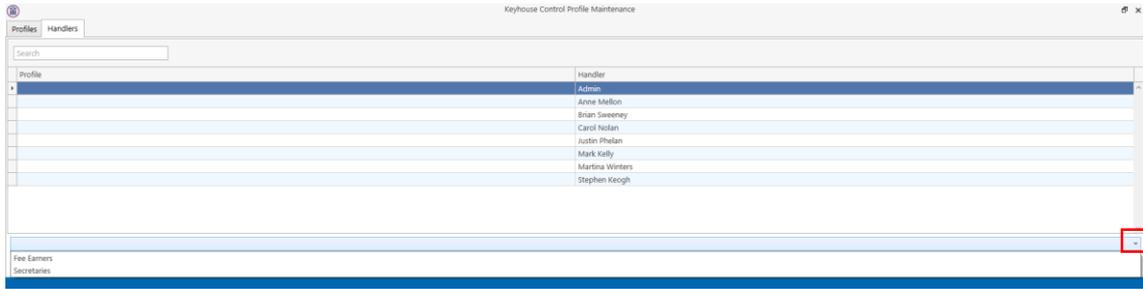
5. Remove the tick from the area to be locked down from the Users



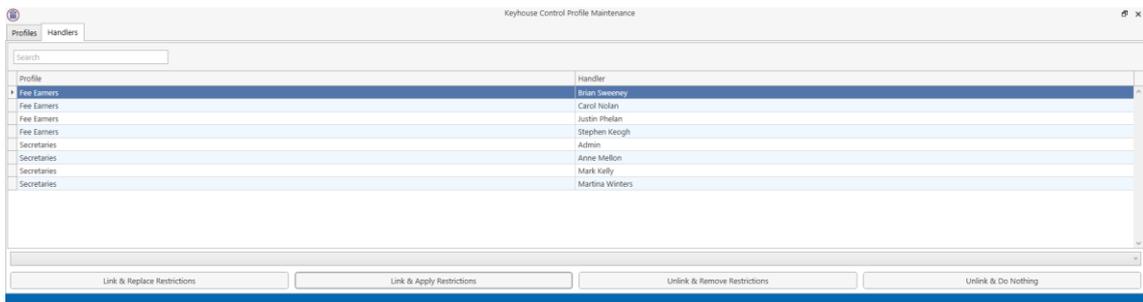
6. Click to the Handlers Tab



7. Select the handlers to be add to the first group.
8. In the bottom right corner click on the down arrow and select the relevant group



9. Click Link & Apply Restrictions. Repeat until all users are in their correct groups. Users may be added to more than one group.



10. If a user has been added to the wrong profile, select the name and click Unlink Handler. Then link them to the correct profile.
11. To remove a user from a group, select the user and click Unlink & Remove Restrictions to give the user full access or Unlink and Do Nothing which will remove the user from the group but keep their restrictions.
12. To move a User to a new group, select the required group and then click Link & Replace Restrictions.

User Report Access

Access to System Reports and User Defined Reports can be controlled in Keyhouse. Access can be removed or users can be given access to specific or all reports.

Access can be denied to individuals as outlined in Handler Control Access. It can also be denied to a group as outlined in Profile Control Access.

Denying access to specific reports

It is also possible to restrict access to system reports and give access only to selected reports.

The procedure for denying access to specific report(s) has 3 steps:

1. Create a Report Group
2. Set which reports this group can access
3. Make users a member of this group

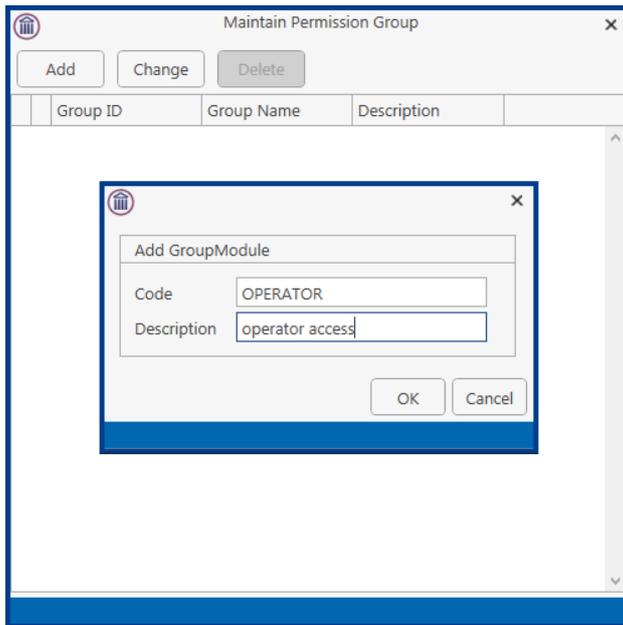
Step 1 – Creating a Report Group

1. Click *Reports* (1)
2. Click *Create Report Group* (2)
3. This will open the *Maintain Permission Group* screen (3) and click Add

The screenshot displays the Keyhouse Case Management software interface. The top navigation bar includes 'Home', 'Case', 'Reports', 'Log', 'Maintain', 'Setup', and 'Help'. The 'Reports' menu is highlighted with a yellow circle labeled '1'. Below the navigation bar, there are icons for 'System Reports', 'User Report', 'Billing Reports', 'Create Report Group', 'Reports Setup', and 'User Reports Permission'. The 'Create Report Group' icon is highlighted with a yellow circle labeled '2'. The main window shows a table of reports with columns: Code, Last Accessed, File Colour, Name, Description, Fee Code, Fee Earner, User1, User2, and User3. A dialog box titled 'Maintain Permission Group' is open, showing buttons for 'Add', 'Change', and 'Delete', and a table with columns for Group ID, Group Name, and Description. The 'Add' button is highlighted with a yellow circle labeled '3'. The dialog box also has a search field and a list of reports to select from.

Code	Last Accessed	File Colour	Name	Description	Fee Code	Fee Earner	User1	User2	User3
000005/0002			BDO	Sale of 14 Arcadia Hall, Lower Glanmire...	EH	Elizabeth He...			
000006/0001			John Lambert		CT	CÓMHNALL...			
000007/0001			Martin King	Gran					
000007/0002			Martin King	Gran					
000008/0001			KJ Carroll Far...	The O					
2C0001/0001			2 Collaborate...	Med					
2C0001/0004			2 Collaborate...	Med					
2C0001/0061			2 Collaborate...	Jona					
2C0001/0062			2 Collaborate...	New					
2C0001/0063			2 Collaborate...						
2C0001/0064			2 Collaborate...						
A1S001/0001			A1 Skip Bags...	Dear					
A1S001/0002			A1 Skip Bags...	Prem					
A1S001/0003			A1 Skip Bags...						
A1S001/0004			A1 Skip Bags...	Ted					
AAT001/0001			Laura Morris	Allied					
AAT001/0002			Laura Morris	AA T					
AAT001/0003			Laura Morris	Rate					
AAT001/0004			Laura Morris	Sale					
AAT001/0005			Laura Morris	100					
AAT001/0006			Laura Morris	AA T					
AAT002/0001			AA Tyremaste...	Loan					
ABA001/0002			Abacus Prope...	Trans					
ABA001/0003			Abacus Prope...	Ridg					

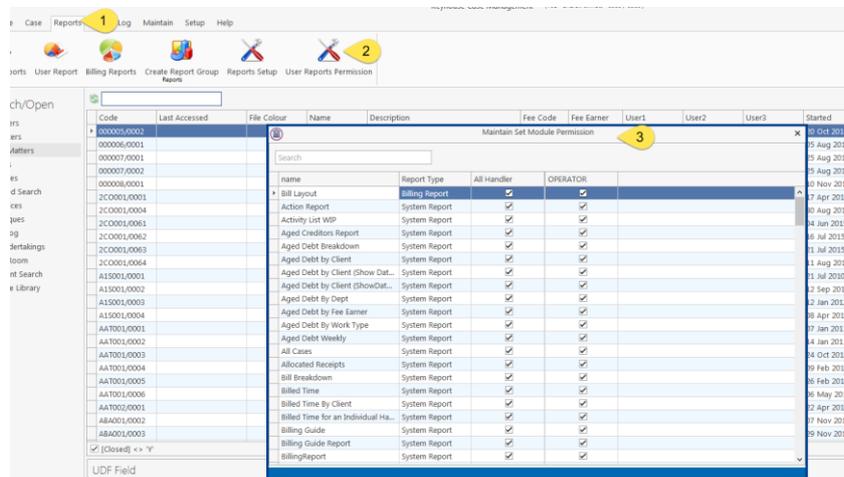
- You will be asked to enter a Code for the Report Group and a brief Description



- Enter the details and click OK to proceed.

Step 2 – Set Reports available to this group

- Click Reports (1)
- Then User Reports Permission (2)
- This will open the Maintain Set Module Permission screen (3)



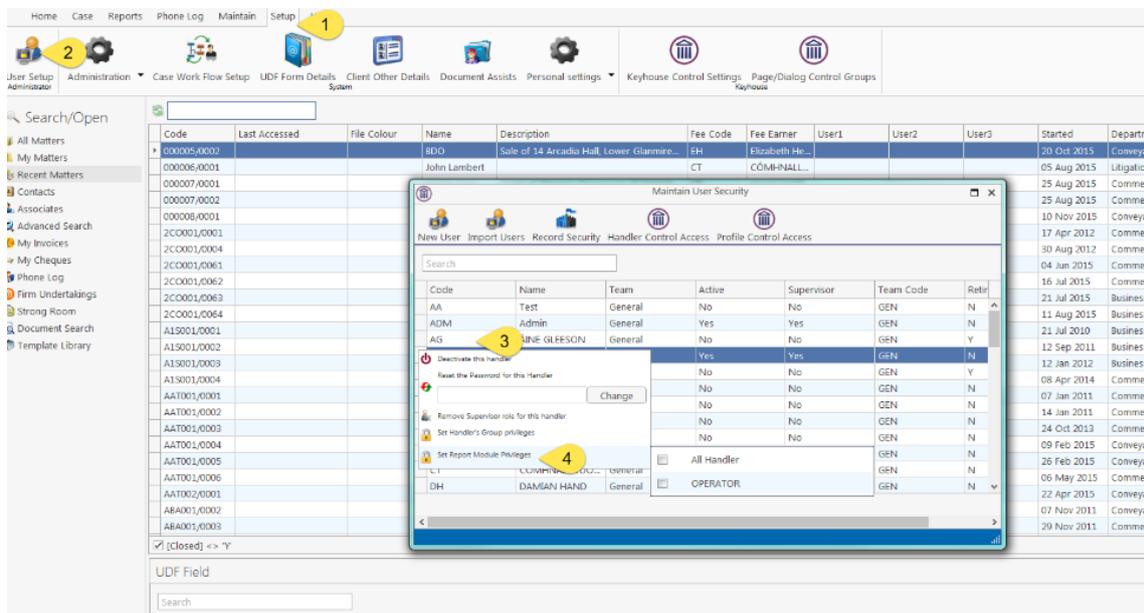
- The Report Group just created is now visible
- Untick the box for whichever reports you do not wish members of this group be able to see
Note: To quickly remove the ticks from all boxes for a Group, right click and select Untick All.

NOTE: Do not untick the All Handler options as this will deny access to all users for all reports.

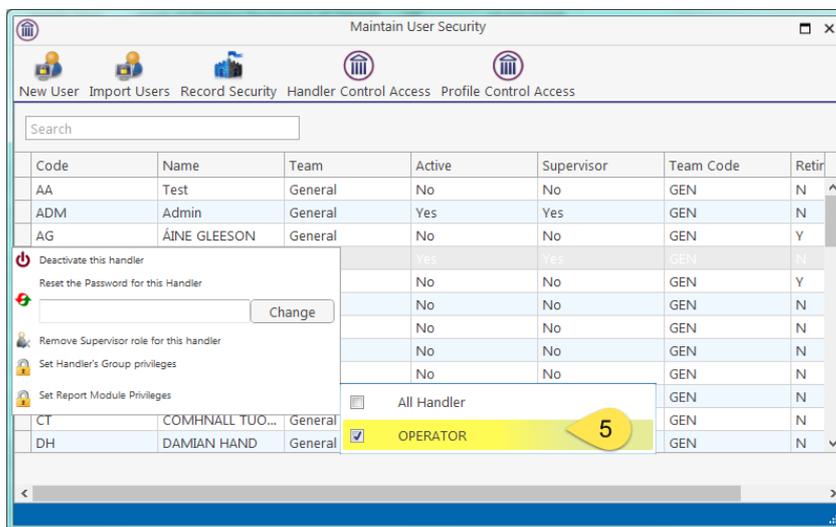
Step 3 – make users a member of the Report Group

- Click Setup (1)
- Then User Setup (2) and right click on the required user (3)

3. Click Set Report Module Privileges (4)



4. This will open a list of all Report Groups which have been set (5)
5. Tick the appropriate box to make this user a member of this Report group
6. The selected user now only has access to those reports which have been set as accessible by the Report Group



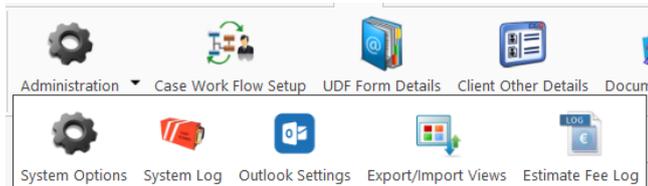
Note: you may set as many Report Groups as you wish, each with varying access. Users may be made members of multiple Report Groups but if they are denied access to a report in one Report Group then even if given access through another Report Group they will not be able to access the report.

ADMINISTRATION

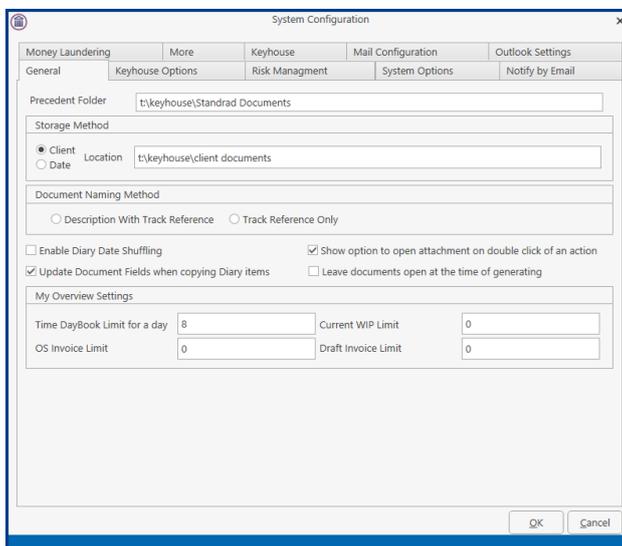
Administration allows for the creation of system wide settings.

System Options

1. On the Setup Ribbon click on Administration



2. Select System Options



The General Tab	Allows the user to change the storage locations for clients and precedents. It also allow the user to select how documents will be named. The Overview Settings are set here.
Keyhouse Options	Configured by Keyhouse at setup. Please do not adjust with prior consultation with Keyhouse
Risk Management	Allows the user to set warnings and limits
System Options	Allows the user to set Account Settings and Preferences
Notify by Email	Allow the user to set up email notification for Invoice and Cheque approval.
Money Laundering	Allows the user to set the Money Laundering Settings and Document Matter settings
More	Category types and Client Numbering system are set here. It is also possible to rename the

	Ref1-Ref3 fields. The Fee related fields can be made compulsory from this tab.
Keyhouse	From this tab you can set system wide permissions including marking documents as Read Only when an action is completed.
Mail Configuration	Please do not adjust with prior consultation with Keyhouse.
Outlook Settings	The settings required for the Outlook Integration are set here.

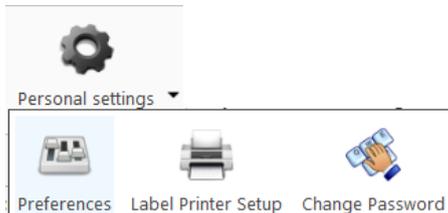
Other Administration Options

 System Log	Records errors which allows for faster resolutions.
 Outlook Settings	Holds the Outlook Integration settings – please do not adjust
 Export/Import Views	Allows for the import and export of the standard Keyhouse views.
 Estimate Fee Log	Records all changes made to estimated fees on matters.

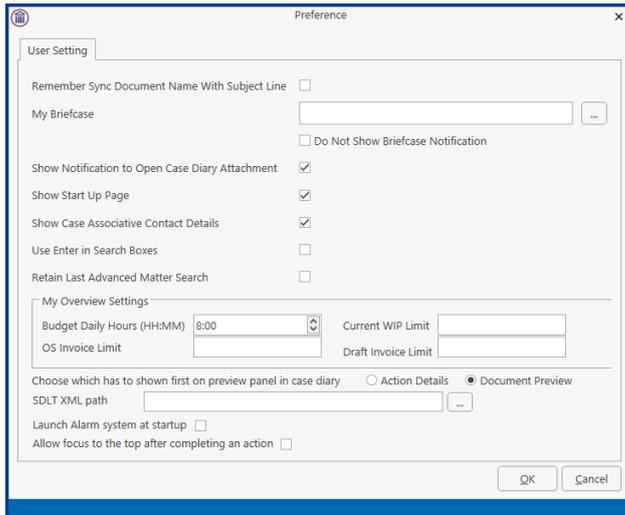
Personal Settings

Each individual user has the ability to change their own personal settings. This is done through the Personal Settings option on the Setup Tab.

1. Click on the Setup Tab and then select Personal Settings.
2. Select Preferences



3. From here the user can make changes need to set their own personal settings.



4. It is also possible to set a label printer and changing user's passwords.

PART 3: SETTING UP CASE PLANS

INTRODUCTION

This document is designed to inform the reader how to complete the case setup section of the Keyhouse Console. Within this document you will learn how to customise the set-up specific to your firm's needs. This manual will begin with the set-up of the different case types required by your firm. Then a case action flow will be completed for each case type, complete with detailed actions, associated actions and associated documents. The aim of this document is to familiarise you, the user, with all these operations. Good luck! And we hope you enjoy the efficiency of the Keyhouse Console.

Objectives

- Background Overview
- Set-up of Case Types
- Set-up of Case Action Flow
- Set-up of Actions
- Set-up of Associated Actions
- Set-up of Associated Documentation

Preparation Needed

In order to successfully complete the set-up section of the Keyhouse Console, it would be beneficial if you gathered the following information.

1. A list of the types of cases your firm deals with e.g. Sale of Property, Wills etc.
2. Upon completion of Step 1, examine each case type individually and compile a list of the steps needed to complete each case type. Be as thorough as possible.
3. Then examine the order in which you complete each step.
4. Finally, examine the type of documents that need to be completed at each step in your case action flow.

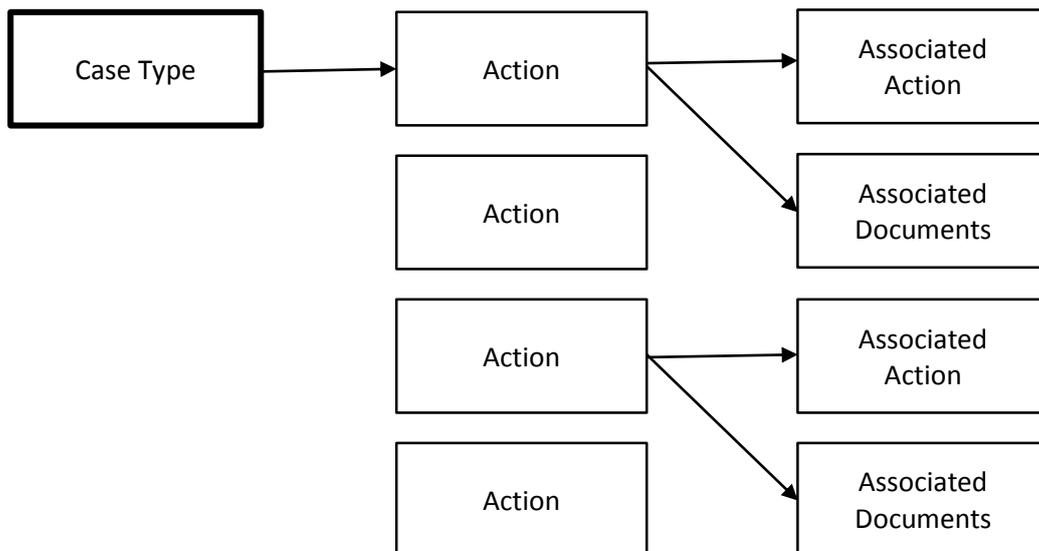
Remember that good preparation will ensure you maximise the benefits of your Keyhouse Console.

BACKGROUND OVERVIEW

Before we begin it might be useful to look how each step of the set-up interacts with each other, below is a graphical representation of this:-

- Case Action Flow Setup: This is the list of steps needed to complete a type of case. It is made up of Actions, Associated Actions and Associated Documents
- Case Type: This is the type of case in use e.g. Purchase of Property.
- Action: An Action is a step within the case action flow.
- Associated Actions: Associated Actions are actions associated or connected with that action.
- Associated Documentation: Associated Documents are documents associated with that step or action.

Case Action Flow/Plan

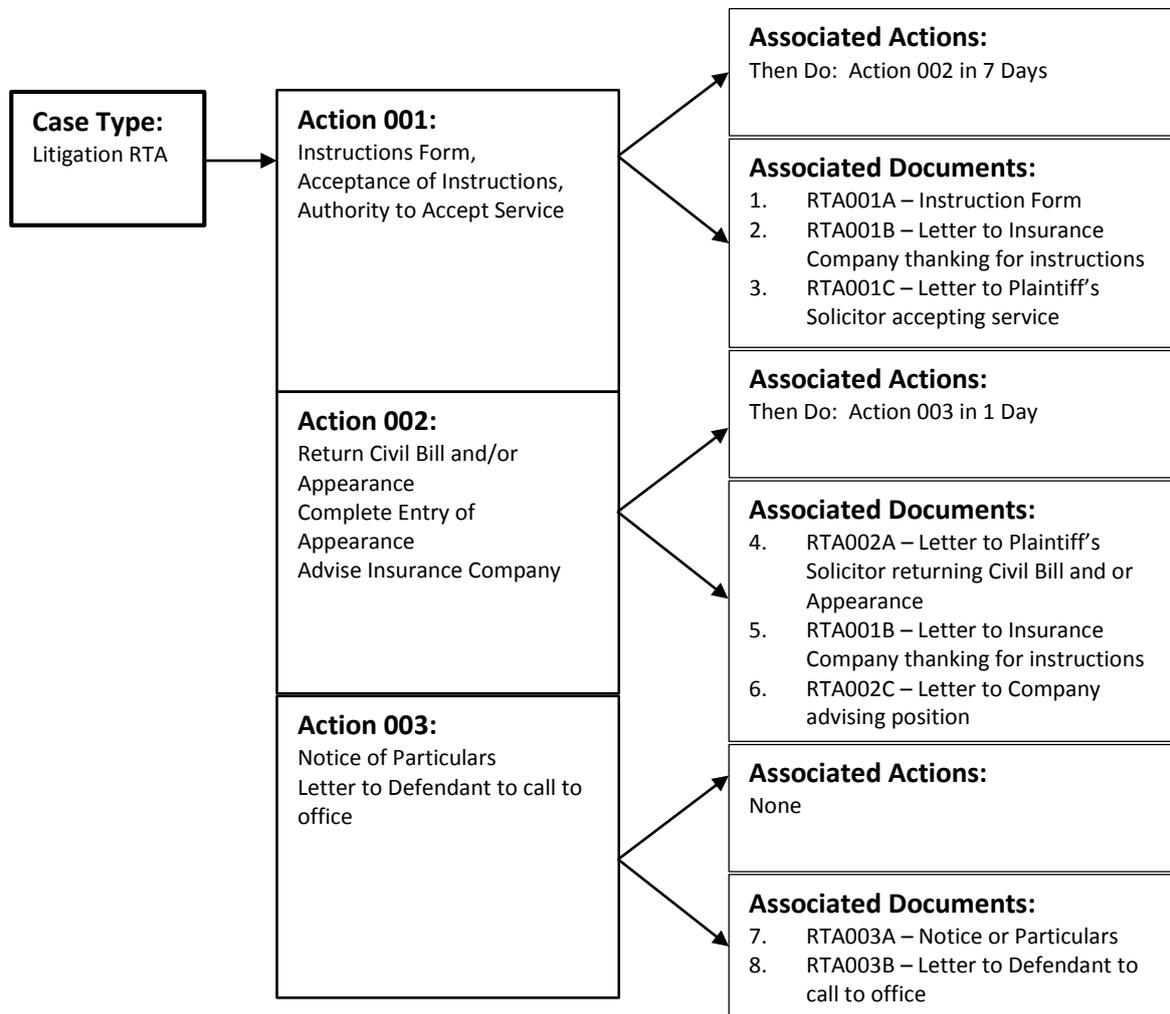


Explanation:

Illustrated in the above diagram we can see that each case type is made up of a case action flow, this is a list of steps that need to be completed. The case action flow is subsequently made up of a series of actions or steps. Each Action may then have associated actions and associated documents, connection with it. Please see the following simplified example of a case type and a case action flow.

Example

Case Flow Plan for a Litigation case type



For more examples see appendices to the rear of the manual.

Frequently used Icons

	Add an Existing Action
	Create a New Action
	Edit an Action
	Delete An Action
	Print the Selected Case Plan

SET-UP OF CASE TYPES

Introduction

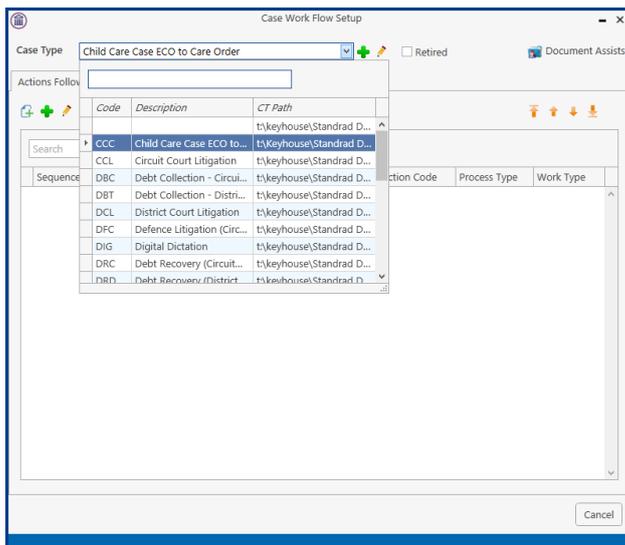
As previously mentioned the set-up of different case types will involve quite an amount of consideration but once the list of different case types is compiled the set-up of the different case types is reasonably straightforward. The set-up of the case type is the first step in case set-up section of the Keyhouse Console.

In this section we familiarise ourselves with the following tasks:

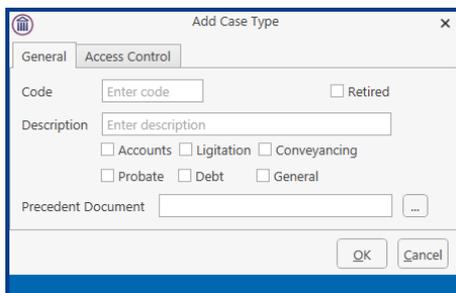
- Adding New Case Types
- Removing Case Types
- Amending Existing Case Types

Adding New Case Types

1. Select Setup from the list of Tabs
2. Select Case Work Flow Setup from the Ribbon. The following dialogue box will appear.



3. To add a Case Type click on the Green Plus beside the Case Type. The following dialogue box will appear.



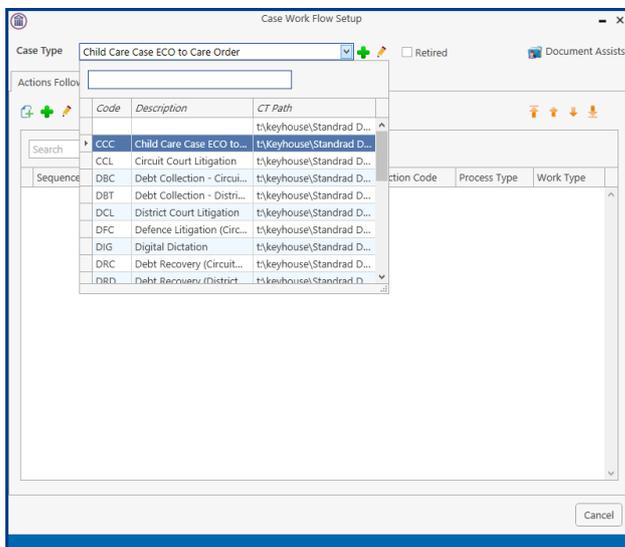
4. Type in an appropriate code in the Code box e.g. LIT for Litigation, this code must be unique and 3 characters in length.

Tip: It would be advantageous to compile a list of appropriate unique codes for each case type.

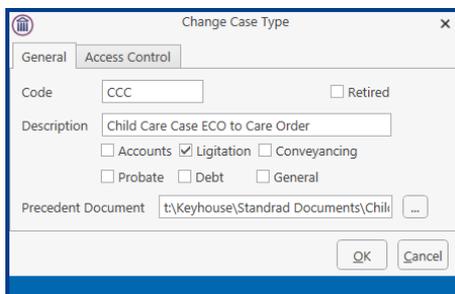
5. Type a description in the Description box e.g. Purchase Work Flow.
6. Below the Description Box you can see a series of tick boxes. Tick the most appropriate category for the case type.
7. Leave the Precedent Documents blank, it will create a storage location for the precedent documents.
8. When completed click the OK button and the case type just created will appear in the Case Type List.

Controlling Access To A Case Plan

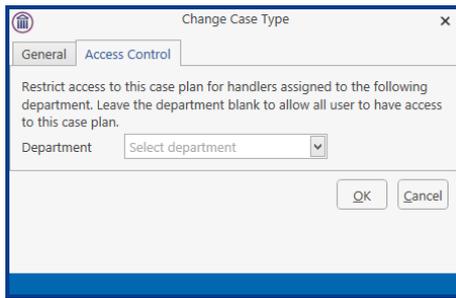
1. Select Setup from the list of Tabs
2. Select Case Work Flow Setup from the Ribbon. Click on the Down Arrow beside Case Type to get the list of all existing case plans. The following dialogue box will appear.



3. Select the case plan you want to restrict.
4. Click on the Edit button (Pencil) beside the Case Type Drop Down Arrow. The following dialogue box will appear.



5. Click on the Access Control tab. The following screen will appear.

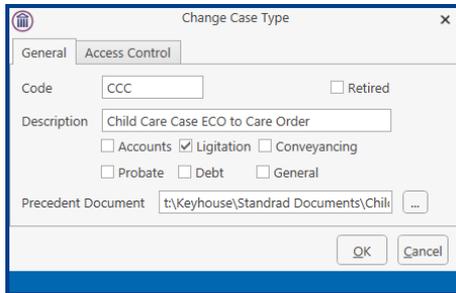


6. Click on the Down Arrow to get a list of departments, select the department to use this case plan.

Note: Only handlers assigned to this department will then have the option of choosing this case plan.

Amending An Existing Case Type

1. Select the required case plan as before.
2. Click on the Edit button (pencil) beside the Case Type Down Arrow.

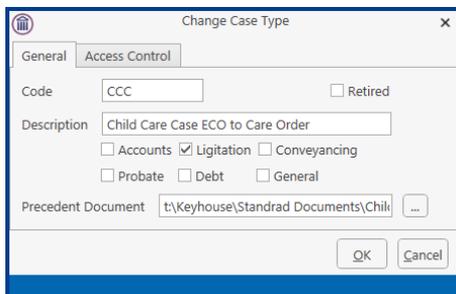


3. The following dialogue box will appear. Make any required changes and click the OK button and these changes will then take place.

Retire A Case Type/Plan

Once a case plan is no longer required it can only be retired. This will prevent it from be selected in error.

1. Select the required case plan as before.
2. Click on the Edit button (pencil) beside the Case Type Down Arrow.



3. Tick the Retired Button. This will remove it from the list of Case Plans.
4. Click OK.

SET-UP OF CASE ACTION FLOW

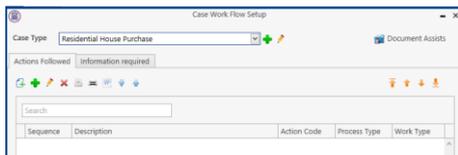
Introduction

After setting up the different case types it is essential to compile a list of steps involved in each case type, these steps are known as actions. The Case Action Flow as illustrated in the Introductory section is made up of a series of Actions, these actions in turn, have Associated Actions and Associated Documents. In this section we will familiarise ourselves with the following tasks:

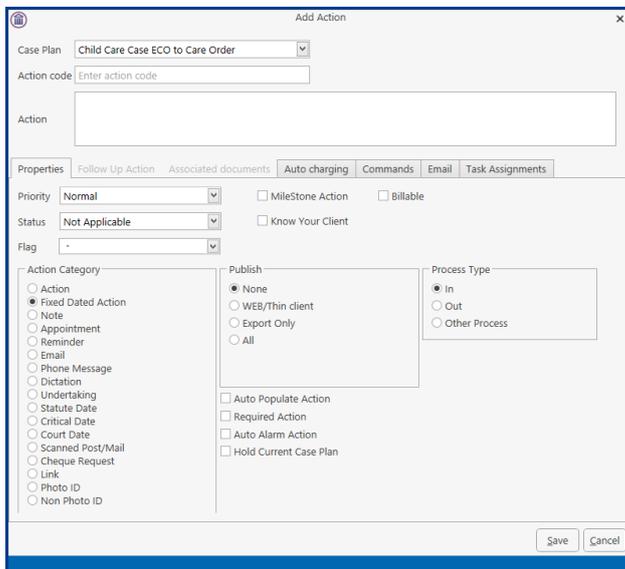
- Set-up of a Case Action Flow
- Creating New Actions
- Amending Existing Actions
- Removing Actions
- Importing Zipped Case Plan Files
- Exporting Case Plans as Zipped Files

Setting Up A Case Action Flow

1. Select the case plan as before.
2. Click on the Green Cross under the Actions Followed



3. The following dialogue box will appear.



4. Add a Unique Number Code for this action in the action code box. This code should be representative of the position the action/step is in the case plan e.g. RHP02 is the second step in the Residential House Purchase Case Plan.

5. Complete the following details in the Properties Tab.

- Priority:** Set the priority of this action e.g. Normal, High, Low using the drop down list provided.
- Milestone Actions:** Use the tick box provided to indicate if it is a Milestone Action i.e. a very important task. For example serving a summons would be a Milestone Action.
- Billable:** Use the Tick box provided to indicate whether a bill is due to be issued at this stage of the Case Action Flow.
- Status:** The Status of the action is the stage of completion of this action for example an action could be open, active, closed or billed.
- Action Category:** Select the appropriate Action Category using the Option Buttons available.
- Publish:** The Publish option is only available for those who have internet and export services available.
- Publishing an action will allow the action to be viewed or exported to an external source. Below is a list of options available.
- Web thin/client:** Publish the action on the internet so that it can be viewed by clients who have this service.
- Export** the action to external sources e.g. as an entry in a database.
- All** will publish the action through the Internet and exports it to an external source.
- None** will do none of the above.
- Process Type:** This refers to whether the action is going out or coming in. For example a letter to a client would be going out therefore the process type would be "out". A Note/Internal Memo process type would be "other process" as it is neither going in or out. Select the Option button for the required process type.
- Auto Populate:** This will automatically add the action to the Case Diary when the case is created.
- Required Action:** This will prevent the action being removed from the Case Diary
- Auto Alarm Action:** Set a reminder on the action
- Hold Current Case Plan:** This will prevent the Case Plan from changing on completion of an action that was added to your Case Plan from an existing Case Plan and where a follow up action exists.

- Click to the Auto charging Tab.

- From this screen the charging arrangements can be changed on the completion of the action.
- Click to the Task Assignment Tab

- From this screen actions can be assigned to specific users and teams by selecting the required option.

- | | |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| Logged on Handler | If you would like the user of this case plan to receive the follow on actions leave the Assigned Action Handler option button as “Logged on Handler”. |
| Case FE | If you would like the Case Fee Earning of this case plan to receive the follow on actions leave the Assigned Action Handler option button as “Case F/E” |
| Case Partner | If you would like the Case Partner of this case plan to receive the follow on actions leave the Assigned Action Handler option button as “Case Partner” |
| Other | If you would like it to go to another specified handler choose the “Other” option button. Use the Down Arrow to locate the required user. |

Logged on Team	If you would like the logged on team for this case plan to receive the follow on actions leave the Assigned Action to Team option button as “Logged on Team”.
Case Team	If you would like the case team for this case plan to receive the follow on actions leave the Assigned Action to Team option button as “Case Team”.
Other	If you would like it to go to another specified team choose the “Other” option button. Use the Down Arrow to locate the required team.

10. Action Authorised/Completion Required by will allow you to control who completes the action if it is to be someone other than the assigned person.
11. When you have completed all the above steps click the OK button.
12. Repeat the procedure to add additional actions.

Amend An Existing Action

1. Select the Action you want to amend.
2. Click on the Edit button (Pencil) under the Actions Followed Tab.
3. Amend as required and click the OK button.

Remove An Existing Action

1. Select the Action you want to remove.
2. Click on the Red X under the Actions Followed Tab.
3. A message box will appear asking you “Are you sure you want to delete this item?”.
4. Click the Yes button to remove.

Note: If the Action has associated actions or documents you will not be able to delete the action. Therefore in order to remove the action the associated actions and associated documents would have to be removed first.

Sequencing Actions

The sequencing tool allows you to alter the order or sequence of the actions in the case plan.

1. Select the Action you want to reposition.
2. Click on the sequence button required. As described below:



The first button will reposition an action to the top of the case plan.
The second button will reposition an action up one level.
The third button will reposition an action down one level.
The fourth button will reposition an action to the bottom of the case plan.

Note: An action will still hold its original code therefore affecting associated actions.

SETTING UP ASSOCIATED ACTIONS

Introduction

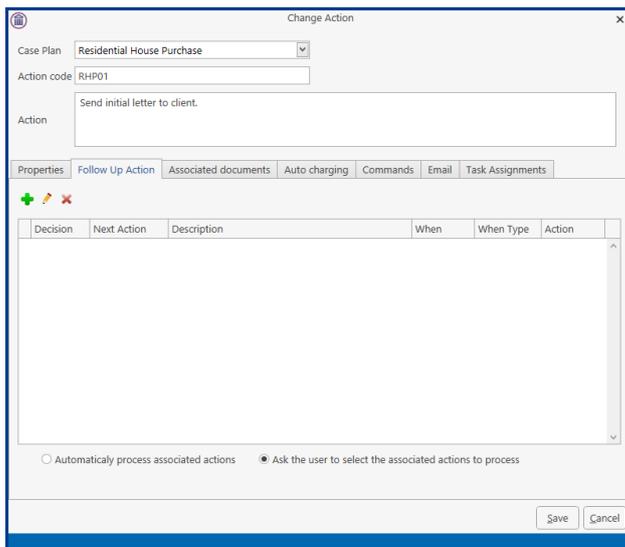
Once the action has been inputted it is then possible to add an associated action to it. Associated actions are actions connected with the main action. In this section we will familiarise ourselves with the tasks.

- Creating Associated Actions
- Removing Associated Actions
- Amending Associated Actions

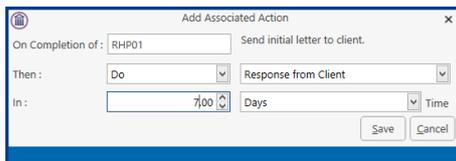
Creating An Associated Action

As described previously associated actions are connected to existing actions in our case action flow. Therefore, by adding associated actions to an action we are amending this action.

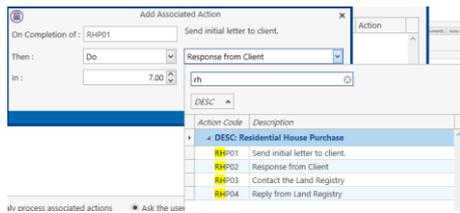
1. Select the required Case Plan as before.
2. All the actions in this case type are displayed.
3. Select the Action you want to add the associated action to.
4. Click on the Follow Up Action Tab



5. Click on the Green Cross and the following dialogue box will appear.



Starting On Completion of: RHP01 then you do
Click on the down arrow and a list of actions will be displayed.



Enter the first letter of the action codes to show get to the required actions.

Select the action required

Click on the down arrow to the left of time and select the time frame required e.g days, weeks, now.

Click on the down arrow to the right of the In box and specify the period.

6. Click Save to link the actions. The Associated Action will then be visible in the Associated Action Window.

To Remove An Associated Action

1. Select the Associated Action you want to remove.
2. Click the Delete Button.
3. A message will appear asking you to confirm the deletion. Click the Yes Button.

To Amend An Associated Action

1. Select the Associated Action you want to amend.
2. Click the Edit button (Pencil)
3. The Change Associated Action dialogue box will appear.
4. Make the required changes and click the OK button. These changes should be visible in the Associated Actions tab.

SETTING UP ASSOCIATED DOCUMENTS

Introduction

Associated documents are documents connected with an action or step i.e. Documents that need to be completed at that stage of the Case Action Flow/Plan.

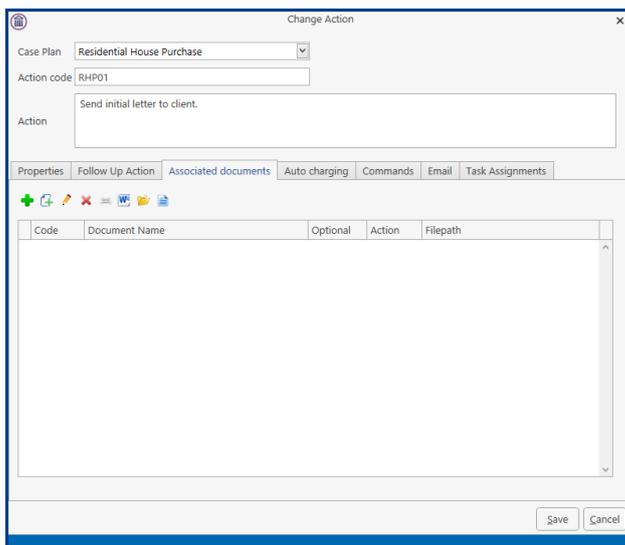
There may be times when you may need to customise an existing library document to meet your requirements. In order to do so you may need to insert extra fields into the document or maybe create your own fields.

In addition you may need to create a new document to add to your document library. To assist in the creation of these documents you can import an existing Word document into your document library and amend as required. Below is a list of tasks to be covered in this section:

- Creating a New Associated Document
- Import a document to create a New Associated Document
- Amending an Associated Document
- Removing an Associated Document
- Adding an existing Associated Document
- Coding a Precedent Document
- Creating User Defined Fields

Creating A New Associated Document

1. From the Setup Tab select Case Work Flow Setup from the Ribbon.
2. Select the Case Plan as before.
3. Double click on the Action you want to add the associated document to.
4. Select the Associated Documents Tab. The following options become available.



5. Below is an explanation of each tool used in creating associated documents.

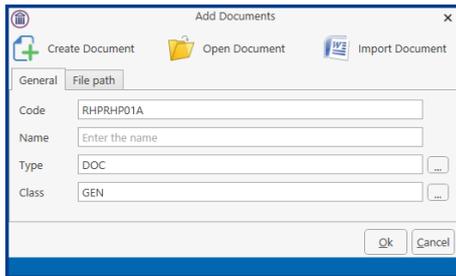


Add a new document

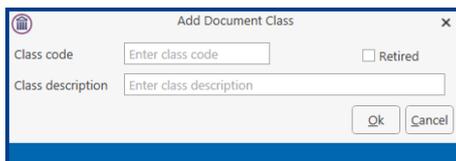
Select a new document

-  Change/Amend document settings
-  Delete an associated document
-  Select a document to import
-  Open selected document
-  Document Properties

6. To create a new document click on the Green Plus. The following dialogue box appears.



7. A code will be assigned automatically. It is made up of the Case Type Code and the Action Code plus a letter A, B C etc. in succession.
8. Enter the Document Name in the Name box e.g. Letter to Plaintiff's Solicitor Re: Notice for Particulars.
9. Type would be Word Document but this can be changed to match the type of document to be added by clicking the button.
10. Click on the button to set the classification for the document. This is used in connection with the Brief Builder Module.
11. IF the code you want is not present, click on the Green Plus within the Document Class window. Enter a three letter code in the Class Code box and a description in the Description box and click OK.

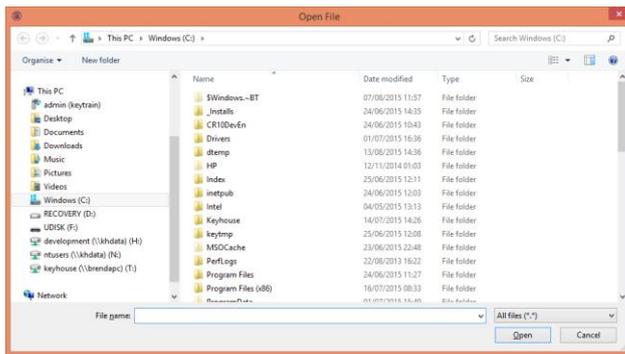


12. The newly created Class will then be available in the Document Class window.
13. Click on the Create Document button, a blank Word document will open. Create the document as required.
14. The document will then be visible in the associated document window of the action.

Import A Document To Create A New Associated Document

There may be occasions when you already have the basic text of a document created that can be used as the foundation of a new document. Follow the instruction above from Step 1 to 11. Then follow the steps below.

1. Click on the Import Document button . The following dialogue box will appear.



2. Browse for the document of your choice then click on the Open button.
3. The document will then be opened along with the Document Assist.
4. Close Microsoft Word.
5. Return to the Keyhouse Console Window. The document will then be visible in the Associated Document code at a later stage in the Section “Coding a Precedent Document”.

To Remove An Associated Document

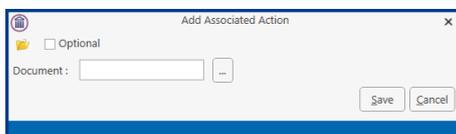
1. Select the Associated Document you want to remove.
2. Click on the Red X.
3. A message box will appear asking you “ Are you sure you want to delete this Associated Document? Click the Yes button and the associated document is removed.

To Amend An Associated Document

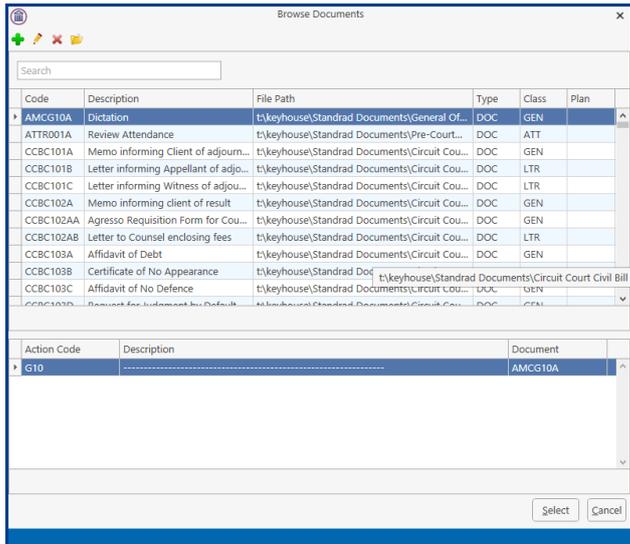
1. Select the Associated Document you want to amend.
2. Click on the Open Selected Document  located on the Associated Documents screen.
3. Amend the document as required.
4. When complete save the changes and close the document.
5. Return to the Keyhouse Console.

Add An Existing Associated Document

1. Click on the Select a New Document button .
2. The following dialogue box will appear.



3. Click on the Browse Button  to display a list of documents in your document library. The following Document Library dialogue box is displayed.

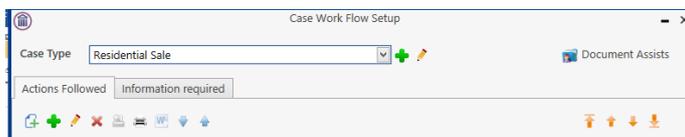


4. Search for the Document required using the search facility.
To use the search:
 - a. Type part of the document name in the search box provided and click enter if needed.
 - b. A list of documents will be returned. Select the document required and click on the Select button.
5. You have the choice to open and view the document using the Open command .
6. If this document is an optional document check the Optional check box.
7. Click the Save button to add the associated document.
8. The document will then be displayed in the Associated Documents window.

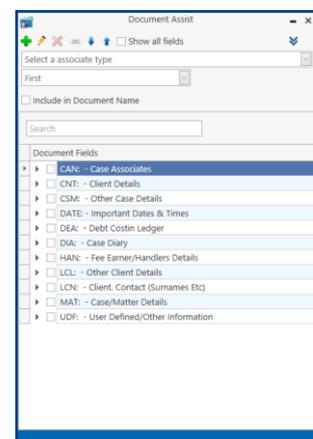
Coding A Precedent Document

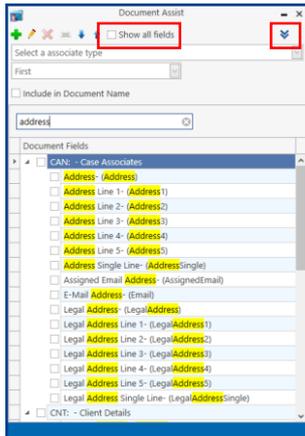
When coding a document we are adding fields from our Keyhouse Console to a normal Word document to allow it to be generated through our Keyhouse Console diary. This will facilitate a normal document merge with data from our case management system to create individual client letter and documents.

1. From the Case Work Flow Setup window open Document Assist.
- 2.

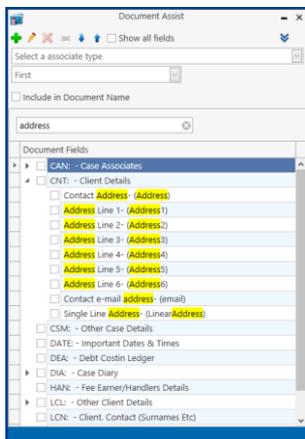


3. Select the Associated Document you want to code.
4. Click on the Open Selected Document button .
5. The Document Assist displays all field that may be added to a document. For more information on the Document Assist go to the Section: Guide to the Document Assist
6. Click on the document where the field is to be added
7. In the Search box enter a word related to the information required e.g. address.
8. All commonly used fields are visible however it may be necessary to tick the Show all fields box to see your required field.





9. Click on the Chevron to collapse the categories.
10. Open the category you need



11. Double click on the required field to add it to the document.
12. Move to the next location on the document and continue until all required fields have been added.
13. Save the document when completed and close.

Note: The document will not show specific information until it is generated through the Console Diary.

ADDING A POPUP PARAGRAPH TO A PRECEDENT

The code below is how to code for a PopUp paragraph on your Precedent – write in the code where the paragraph itself will be placed:

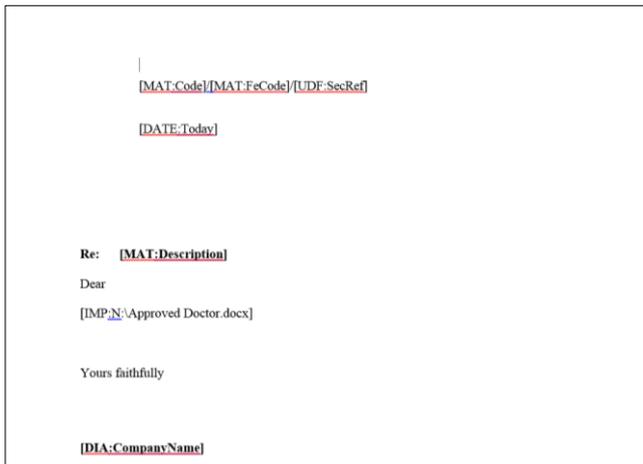
E.g. [SYS:dpopup('XXX')] where XXX is the category name you assigned when setting up the PopUp paragraph

You can have multiple paragraph options.

IMPORTING A DOCUMENT TO A PRECEDENT

This will allow you to import a document stored outside Keyhouse to a Precedent document stored in Keyhouse.

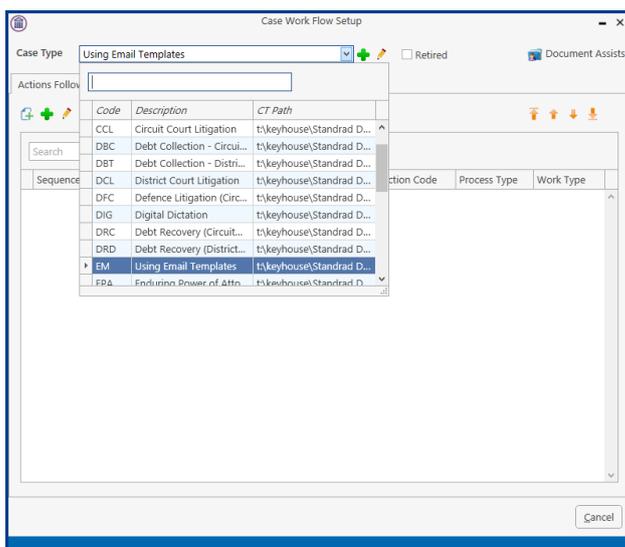
1. Go to the Setup Tab and open Case Work Flow Setup.
2. Open the Work Flow containing the Precedent.
3. Double click on the Action that contains the document.
4. Open the Associated Document Tab and double click on the Document.
5. Go to the location where the document is to be inserted.
6. Enter the following:
[IMP:filepath]



7. Save and close the document.

CREATING AN EMAIL TEMPLATE WITHOUT AN ATTACHMENT

1. Choose the required Workflow.
2. Open Document Assist.

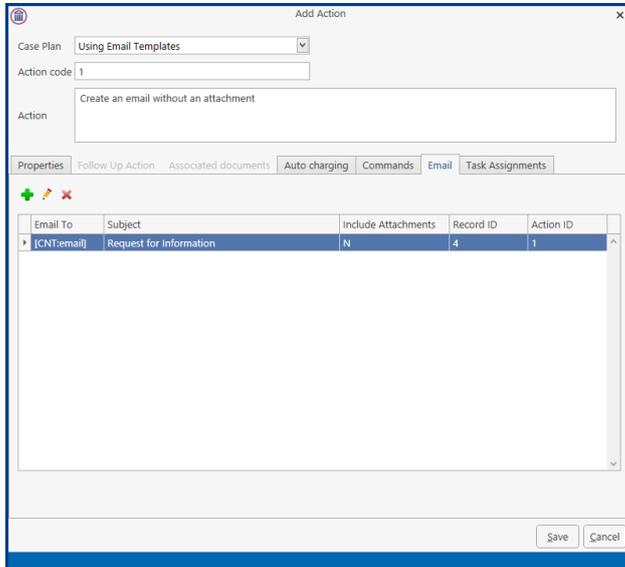


3. Create a new action.

4. Set the properties to Email and save.
5. Open the Action and click on the Email Tab.

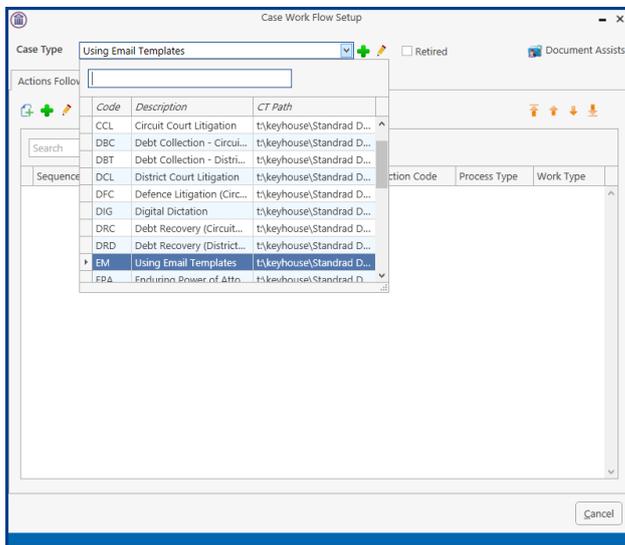
6. Click on the green plus sign to create a new email.

7. Using Document Assist to Code the Email with the relevant information and type the text required.
8. Save the changes.

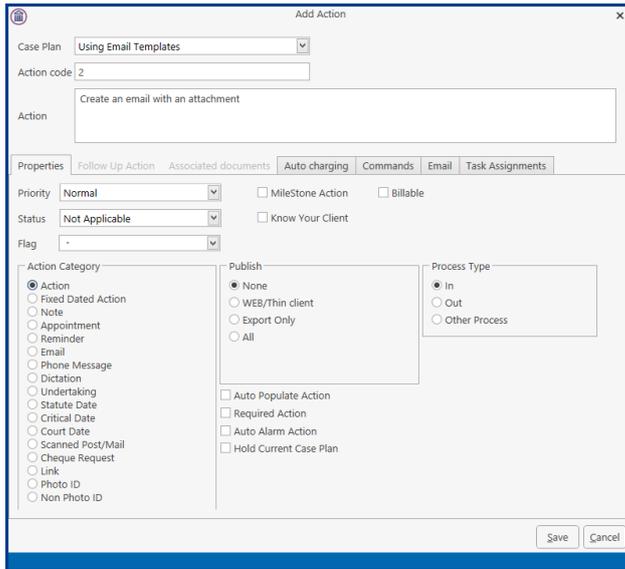


CREATING AN EMAIL TEMPLATE WITH AN ATTACHMENT

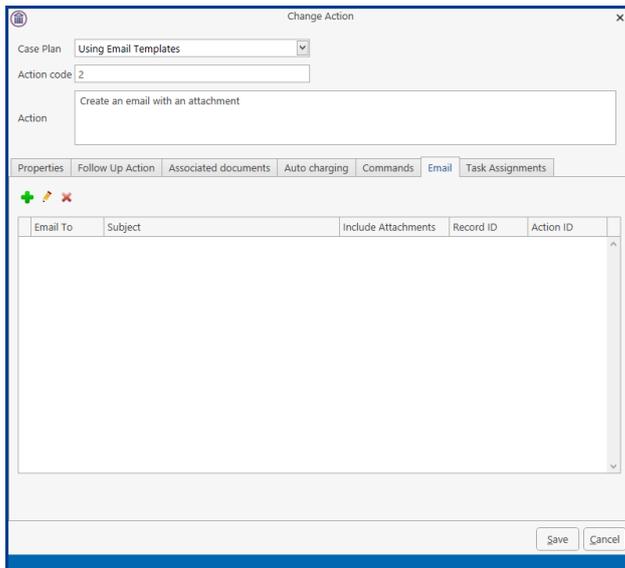
1. Choose the required Workflow.
2. Open Document Assist.



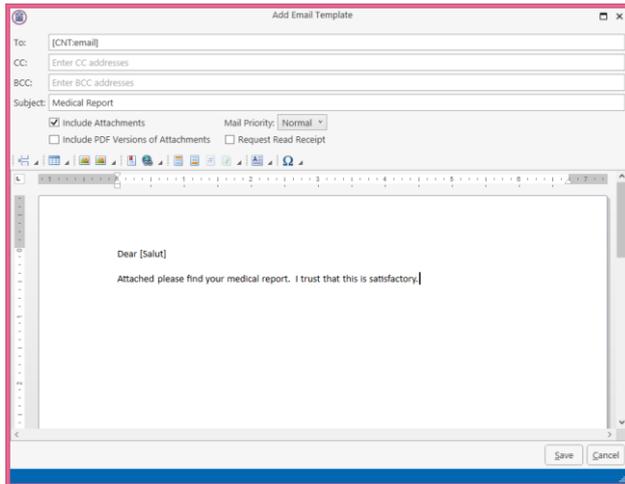
3. Create a new action.



4. Set the properties to Action and save.
5. Open the Action and click on the Email tab.



6. Click on the green plus sign to create a new email.



7. Using Document Assist to Code the Email with the relevant information and type the text required.
8. Tick the Include Attachments button. It is also possible change the priority of the mail and to send a PDF Version of the attachment.
9. Click to the Associated Documents Tab and create the required document as detailed in section “Setting Up Associated Documents”.
10. Click save and then save again.
11. Click Cancel to close the Workflow.

GUIDE TO THE DOCUMENT ASSIST

1. Case Associates – are everyone connected to the case other than the client and the fee earner. For example – the other side’s solicitor, the doctor, the land registry, the lending institution, the court, the defendant, the witness etc.
 - a) First pick the appropriate case associate type from the drop down list provided. For example Solicitor, Doctor, Witness etc. This will determine which category of case associate the user will be prompted for on this document.

You may want your document to cater for one/more solicitors on a file:

 - i) First Solicitor on a file use the following code for his/her name [CAN:Name.Solicitor#01]. This will allow the user only to add the first solicitor’s name to the document.
 - ii) Second Solicitor on a file use the following code for his/her name [CAN:Name.Solicitor#02]. This will allow the user to add the second solicitor’s name to the document.
 - iii) If you want to cater for multiple solicitors on a file then the code would be the following code for his/her name [CAN:Name.Solicitor#??]. This will pause and ask the user which solicitor’s name they want added to the document.
 - b) Example of Advanced Codes:
 - i) [CAN:Name.Solicitors#??] produces a separate letter for each solicitor selected.
 - ii) [CAN:Name.Defendant#@,] lists multiple defendants in a document with a “comma” between them.
 - iii) [Can:Name.Defendant#@&] list multiple defendants in a document with an “and” between them.
 - iv) [CAN:Name.Defendant#@R] lists multiple defendants in a document with a “line” between them.

Note: If it is a single defendant then it doesn’t enter the comma etc.

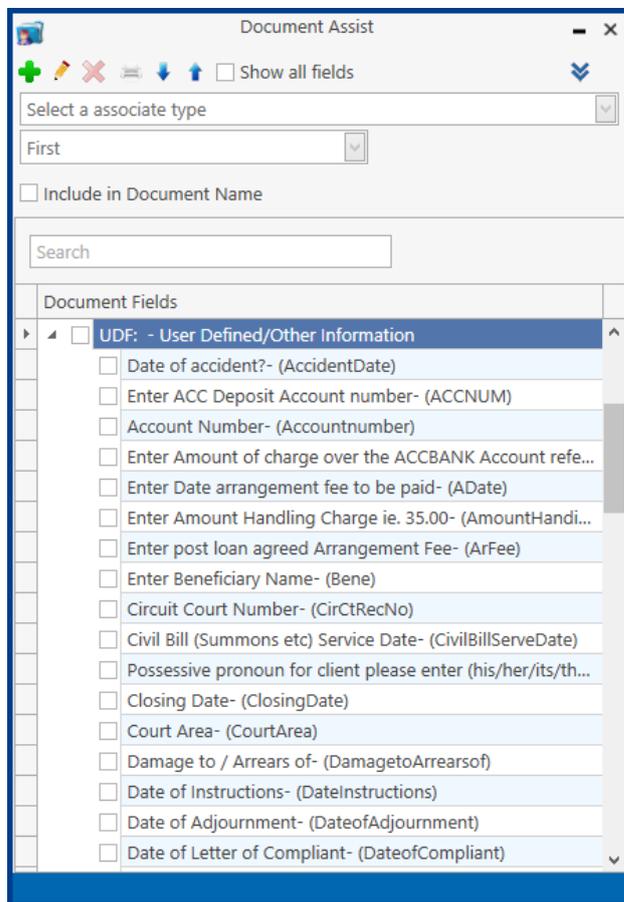
2. Case Diary – this is a list of items from the case diary window. For example the date of the action, the action number.
3. Case/Matter details – this is the information input in the matter record. For example the matter code, the matter description, the fee earner name and code connected to this case etc.
4. Client Details – this is the information inputted in the client record. For example the client’s name, address, date of birth, marriage, telephone number etc.
5. Client Contacts – this is the information inputted in the client contacts section of the client record. For example the client spouse could be setup as a contact – Name, Address, PPS number, date of birth etc.
6. Fee Earner/Handler – this information inputted in the handler/fee earner record. For example it could be the current handler logged in details or the details of the fee earner assigned to this matter – Fee Earner Name, Fee Earner Code, Current Handler’s code etc.
7. Important Dates & times – this contains fields that contain the date of a particular action or today’s date - Today’s Date, Action Date etc.
8. Other Case Details – this is additional information inputted in the other details section of the matter record. For example the “case premises” would be a field displayed in the “Other Details” tab of a conveyancing field or “Balance of Debt” field would appear in the “Other Details” tab of a debt recovery file.
9. Other Client Details – this is additional information for the client.
10. User Defined/Other Information – these are fields you create yourself to deal with anything that is not catered for in the above lists.

Note: To view additional fields in each category put a tick in the **All Fields** Check Box Show all fields at the top of the Document Assist dialogue box.

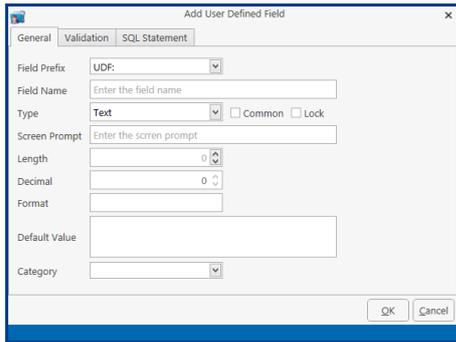
Creating User Defined Fields

On occasion you may want to insert information that is not available from the existing field lists in this case you can create your own fields this will allow you the flexibility to customise your own documents. The information behind these fields will be requested at the point the User generates the document through their Console Diary.

1. In the Document Assist window.
2. Click on Black Arrow to expand the User Defined/Other Information. The following Window is displayed.



3. Click on the Green Plus. The following dialogue box is displayed.



4. Fill in the following information:

File/Table:

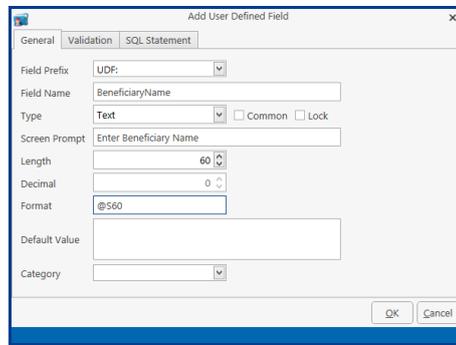
The File/Table Name is UDF for User Defined Fields

Field Name:

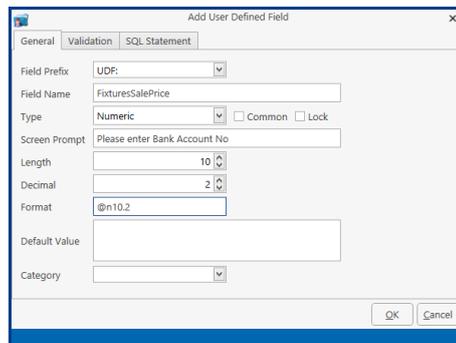
Type in a Field Name in the box provided, this must not contain spaces.

Type:

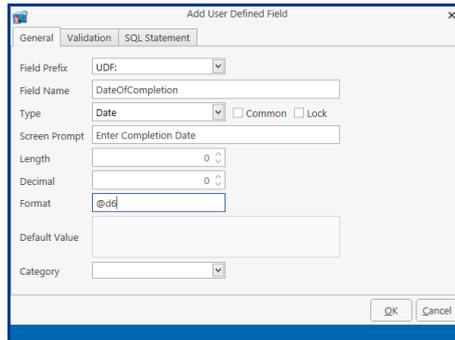
Select the **Type** from the drop down list provided i.e. the type of information that will be inputted i.e. Text, Dates or Numbers.



When creating a Text Field enter @sxx where xx representing the number of characters set in the length.



When creating a Numeric Field enter @nxx.x where xx.x represents the length and decimal values.



When creating a Date Field enter @d6 to get a date in the format of dd/mm/yyyy or @d18 to get a date in the format of dd/mmmm/yyyy.

Common: If you want this field always visible in the User Defined list tick this box.

Screen Prompt: The Screen Prompt is the description displayed to the User at the point the document is generated e.g. "Please enter court date?"

Length: Is the Amount of characters that can be inputted in this field. Adjust using the **Up And Down Arrows** as required.

Decimal: Decimal will only be applicable to numbers: this is the amount of decimal places you want visible. Adjust using the **Up And Down** arrows as required.

Format: If the data type is **Date** click on the browse button to select the preferred date format. Otherwise the data type and length will determine the format.

Default Value: This is the value you would like to default to. If applicable, type the default value in the box provided.

5. Validations can be added for stricter control of the information inputted. A useful option is the "always prompt" command which can be used for fields where the information changes frequently for example the Secretary's Reference.
6. Click the OK Button.
7. To insert this field as before, insert your cursor where you want the information to appear. Then double click the Field of your choice. It should then appear in the document displaying its field name.
8. Save the document as normal.

UDF FORMS

Certain cases/matters may need you to capture specific information that will require you to create UDF fields in Keyhouse. These fields can be gathered together using UDF Forms.

Create a UDF Form

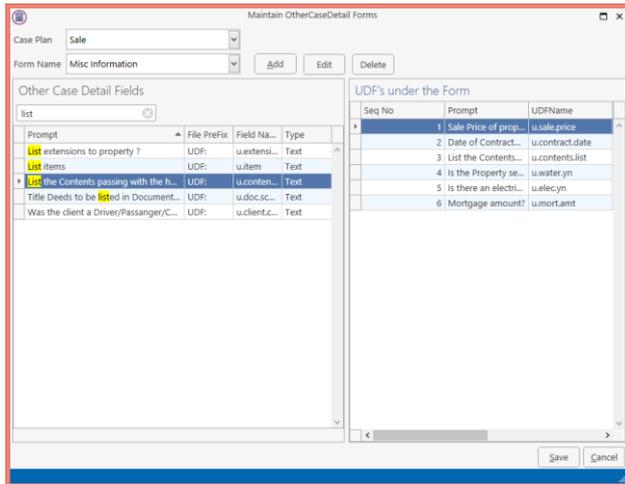
1. Select the Setup Tab and then select UDF Form Details

Prompt	File Prefix	Field Name	Type
How the accident occur...	UDF:	AccidentCase	Text
Date of accident?	UDF:	AccidentDate	Date
Enter ACC Deposit Acco...	UDF:	ACCNUM	Text
Account Number	UDF:	Accountnum...	Text
Enter Amount of charge...	UDF:	ACHamt	Text
Enter Date arrangement...	UDF:	ADate	Text
Enter Arrangement Fee	UDF:	AFee	Text
Claim Type	UDF:	AIGClaimType	Text
Date Damages Agreed	UDF:	AIGDamages...	Text
Date Costs Settled	UDF:	AIGDateCost...	Text
Injury Type	UDF:	AIGInjuryType	Text
Ambulance attended sc...	UDF:	Ambulance	Text
Enter Amount Handling...	UDF:	AmountHan...	Numeric
An Post Endorsement	UDF:	AnPostEndor...	Text
Enter post loan agreed...	UDF:	ArFee	Text
Client's relationship to...	UDF:	Attorney1Rel...	Text
Client's relationship to...	UDF:	Attorney2Rel...	Text
Client's relationship to...	UDF:	Attorney3Rel...	Text
Client's relationship to...	UDF:	Attorney4Rel...	Text

2. Select the Case Plan to be used.
3. Then click on Add to add a Form Name, enter the Name to be used and click OK.
4. Use the search box under the Other Case Details Fields to find the UDF's required.

Seq No	Prompt	UDFName
1	Sale Price of prop...	u.sale.price
2	Date of Contract...	u.contract.date
3	Mortgage amount?	u.mort.amt
4	Is the Property se...	u.water.yn
5	Is there an electri...	u.elec.yn
6	List the Contents...	u.contents.list

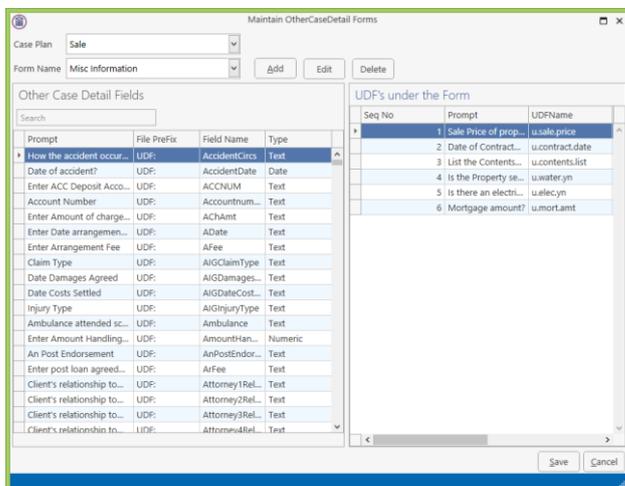
5. The order the items appear in the form can be changed by dragging the item to the new location in the list.



6. To remove a UDF field from the report, right click on the field and select delete.
7. When all items are in place click Save and then OK.
8. If the same UDF Form is required for more than one workflow then it will need to be created again in the second workflow.

Edit a UDF Form

1. Go to the Setup Tab and select the UDF Form Details.
2. Enter the Case Plan associated with the UDF Form to be changed
3. Select the UFD Form to be changed



4. Make the required changes
5. Click Save and OK.

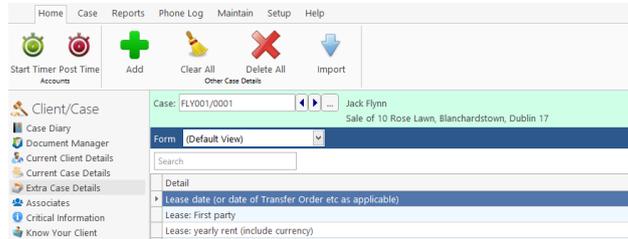
Delete a UDF Form

1. Go to the Setup Tab and select the UDF Form Details.
2. Enter the Case Plan associated with the UDF Form to be changed
3. Select the UDF Form to be changed
4. Click the Delete Button to remove the form.

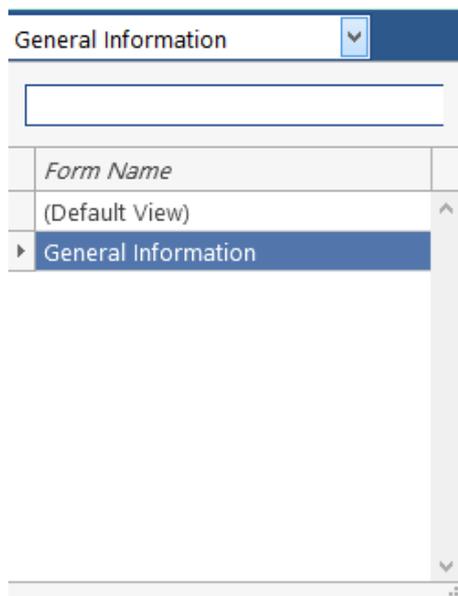
Apply the Form to a Matter

1. Open the required matter and check the correct Case Plan has been selected on the Current Case Details screen
2. Go to the Other Case Details Screen.

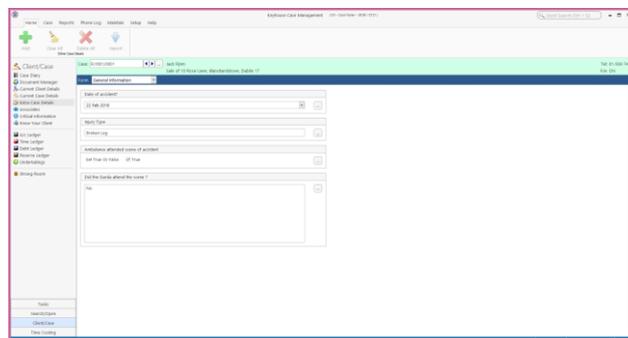
8.25



3. Click on the down arrow beside Default View and select the required form.



4. The UDF Fields will appear on the screen.
5. Complete the fields as normal.



6. The information is now available to use in correspondence if it is included in Case Plan Precedents.

CLIENT OTHER DETAILS

Forms can be created for individual clients. This will enable UDF information to be held at the client level and be visible on all matters for that client.

Create a Client Other Details Form

1. Select the Setup Tab and then select Client Other Details

Prompt	File Prefix	Field Name	Type
How the accident occur...	UDF:	AccidentCircs	Text
Date of accident?	UDF:	AccidentDate	Date
Enter ACC Deposit Acco...	UDF:	ACCNUM	Text
Account Number	UDF:	Accounnum...	Text
Enter Amount of charge...	UDF:	ACHAmit	Text
Enter Date arrangemen...	UDF:	ADate	Text
Enter Arrangement Fee	UDF:	AFee	Text
Claim Type	UDF:	AIGClaimType	Text
Date Damages Agreed	UDF:	AIGDamages...	Text
Date Costs Settled	UDF:	AIGDateCost...	Text
Injury Type	UDF:	AIGInjuryType	Text
Ambulance attended sc...	UDF:	Ambulance	Text
Enter Amount Handling...	UDF:	AmountHan...	Numeric
An Post Endorsement	UDF:	AnPostEndor...	Text
Enter post loan agreed...	UDF:	AirFee	Text
Client's relationship to...	UDF:	Attorney1Rel...	Text
Client's relationship to...	UDF:	Attorney2Rel...	Text
Client's relationship to...	UDF:	Attorney3Rel...	Text
Client's relationship to...	UDF:	Attorney4Rel...	Text

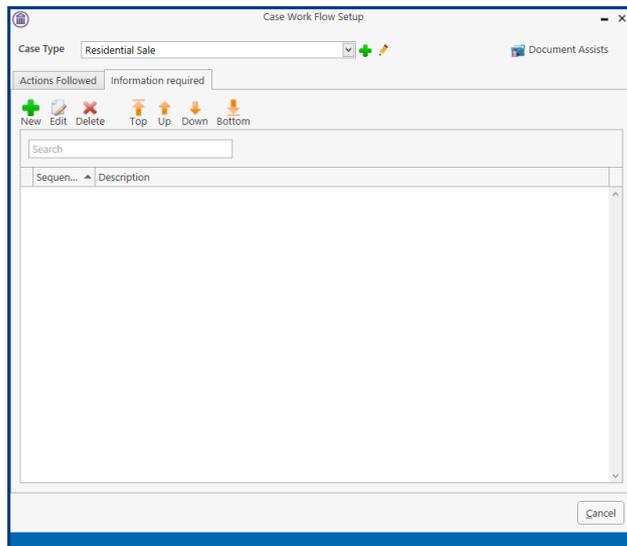
2. Select the Client Code.
3. Click Add and then enter a Form Name in the box and click OK.

ADDING INFORMATION REQUIRED TO A CASE ACTION FLOW

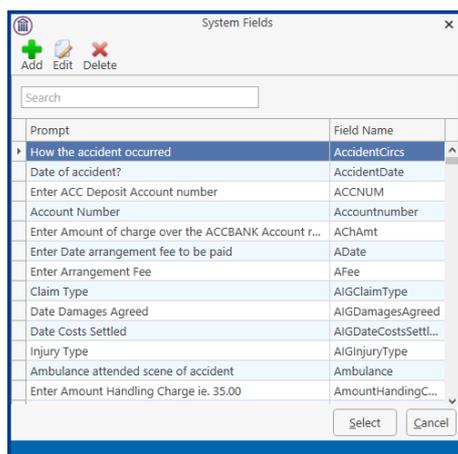
Introduction

It may be essential before a specific case type can be processed that particular information is required. This information can be facilitated through the use of User Defined Fields (UDF's). The Information Required Tab is where the User Defined Fields specific to this case type are selected. Below are the instructions on its use.

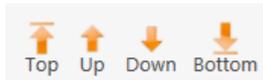
1. From the Setup Tab select Case Work Flow Setup.
2. Select the required Case Work Flow as before.
3. Select the Information Required Tab. The following dialogue box will appear.



4. Click on the Green Plus and the following dialogue box will appear.



5. Use the search box to locate the UDF required.
6. Click Select
7. Repeat Step 5-6 until all UDF's have been entered.
8. Once all fields have been entered you can the order of the fields sing the reorder buttons.



9. To remove any UDF's no longer required, click on the Red X.

APPENDIX

Appendix 1: Sample Case Action Flow

This is a sample of a Case Action Flow/Plan which you could create using the techniques described in the following section:

- Set-up of Case Action Flow
- Setting up Associated Actions
- Setting up Associated Documents

CIRCUIT COURT ROAD TRAFFIC				
DEFENCE ACTION FLOW				
Action No	Description of Action	Documents required	Code	Act - days
001	Complete Instruction Form Acceptance of Instruction Authority to accept service	Instruction Form Letter to Ins Co thanking for instructions Letter to PI's Solr accepting service	RTA001A RTA001B RTA001C	002 in 4 days
002	Return of Civil Bill and/or Entry of Appearance Send Civil Bill/Advise to Ins Co	Letter to PI's Solr returning Civil Bill and/or Appearance Appearance Ltr in Ins Co advising position	RTA002A RTA002B RTA002C	003 in 7 days
003	Notice for Further Particulars Letter to Defendant to call to office	Notice for Particulars Letter to Defendant	RTA003A RTA003B RTA003C	

Appendix 2: Sample of a Blank Precedent Document

This document is a sample of a document that could be imported and then used to produce a precedent document. To produce this document use the techniques described in the Section: **Setting up Associated Documents.**

VENDOR INSTRUCTION SHEET RESIDENTIAL HOUSE

1. INSTRUCTION DETAILS:

- a. **Date of Instruction:**
- b. **Fee Earner
Handler**

2. CLIENT/VENDOR INFORMATION

- a. **Name:**
- b. **Address:**
- c. **Phone No. Home: Office/Fax
 Mobile: Email:**
- d. **Occupation:**
- e. **Date of Birth:**
- f. **Marital Status:**
- g. **Date of Marriage:**
- h. **Name of Spouse:**
- i. **Client's SSI No:**
- j. **Spouse's SSI No:**

3. ASSOCIATED PARTIES:

- a. **Name of 1st Purchase:
Address of 1st Purchaser:**
- b. **Name of 1st Purchase:
Address of 1st Purchaser:**
- c. **Purchaser's Solicitors:
Address:**
- d. **Phone No: Office: Fax:
 Email:**
- e. **Auctioneer:**
- f. **Local Authority/County Council:**
- g. **Lending Institute:**

4. PROPERTY DETAILS:

- a. **Sales:**
- b. **Deposit to be paid:**

- c. Closing Date:
- d. Interest Rate:
- e. Sale Price includes the following:
- f. Sale Price excludes the following:
- g. Description of Property: ALL THAT AND THOSE
- h. Is the Property Mortgaged? Yes/No
- i. Are there any extensions carried out in the Property? Yes/No
- j. Where are the Title Deeds?
- k. Title Deeds to be listed in Documents Schedule:

Outstanding Information for File no:

Appendix 3: A Sample of a Coded Precedent Document

This is a sample of a coded precedent document. To produce this document use the techniques described in the following Sub Sections of Setting Up Associated Documents:

- Coding a Precedent Document
- Creating User Defined Fields

INSTRUCTION FOR VENDOR – RESIDENTIAL HOUSE

DATE OF INSTRUCTIONS: [UDF: DateInstructions]

Lawyer: [HAN:Name]

CLIENT INFORMATION

Client Name: [CNT:Name]

Address: [CLNT:Address1]
[CLNT:Address2]
[CLNT:Address3]
[CLNT:Address4]
[CLNT:Address5]

Phone No: Home: [CNT:Tel] Office/Fax: [CNT:Fax]
Mobile: [LCL:CIMobNo] Email: [CNT:email]
Marital Status: [LCL:CIMartialCde] Job Type: [CNT:Occupation]
Date of Birth: [CNT:DOB]

CASE SCREEN DETAILS:

Name of Auctioneer: [CAN:Company.Auctioneers#01]

Name of Local Authority/County Council: [CAN:Company.LocalAuthori#01]

Name of Bank/Building Society: [CAN:Company.Bank#01][CAN:Company.Build#01]

PROPERTY FOR SALE [CSM:CsPremisis]

Name of 1st Purchaser: [CAN:Name.Purchaser#01]
Address (Home): [CAN:LinearAddress.Purchase#01]

Name of 2nd Purchaser: [CAN:Name.Purchaser#02]
Address (Home): [CAN:LinearAddress.Purchase#02]

Name of Other Solicitor: [CAN:Company.Solicitors#01]
[CAN:LinearAddress.Solicitors#01]

Telephone: [CAN:Phone.Solicitors#01] Fax No: [CAN:Fax.Solicitor#01]

CLIENT DETAILS

RSI No: [LCN:CISSTNumber#01]

Spouse RSI No: [LCN:CISSTNumber#02]

Spouse's Name: [CNT:Spouse]

Date of Marriage: [qCNT:DateofMarriage]

Is the Property Mortgaged? YES/No

Are there any extensions carried out to the Property? Yes/No

Where are the Title Deeds? [CAN:Company.Bank#01] [CAN:Company.Build#01]

CONTRACT FOR SALE

Sale Price: [UDF:SalePrice] Closing Date: [UDF:ClosingDate]

Deposit to be paid: [UDF:Deposit]

Interest Rate:

Description of Property: ALL THAT AND THOSE [UDF:DescProp]

Does the sale price include the following:

[UDF:ContentsList]

What fixtures does client wish to exclude from sale:

[UDF:ContentsProp]

Is there anything unusual about this sale that you wish to draw our attention to?

Title Deeds to be listed in Documents Schedule:

[UDF:DocSchedule]

Other Information for File No: [MAT:Code]