



KEYHOUSE END USER MANUAL

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Typographical conventions



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



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



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



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

Chapter 1: Getting Started

Opening Case Management

1. Start Keyhouse by **double-clicking** the Keyhouse shortcut on your Desktop.

2. The first time you log in, you will have to use your **Handler Code and Password**. If you have previously enabled the use of your **Windows ID**, you may log in without having to enter your password.



3. Enter your **Handler Code** (typically your initials) and password. If you wish to log in in future using your **Windows ID**, check the box labelled **Link this login to your Windows Login**



4. Once you have logged in, you will be presented with a choice of where to start: **Recent Matters**, **Task Manager** or **My Overview**

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



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

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

6. Task Manager will show you your task list.

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

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

Tasks

My tasks

Team tasks

Day's tasks

Next week's tasks

Next month's tasks

Overdue tasks

Outstanding tasks

Last week's tasks

Last month's tasks

All tasks

My Overview

Carol Nolan

29 October 2014

Recent Matters

Code	Name	Description
BLA001/0001	Gordon T. Black	RTA Walkinstown Crossroads, G. Black
BLA001/0000	Gordon T. Black	0000 Matter
AAA001/0003	AAA Securities Ltd	Sale of 1 Main Street, Laragh, Co. Wick...
CUL001/0001	Ann Marie Cullen	Credit Card Debit
FS001/0001	Melinda Fisher	Sale of Lands in Wicklow
DEA001/0000	James Deane	0000 Matter
CLU001/0001	Bill Clinton	Unfair dismissal by State Department
FIT002/0001	Melinda FitzGerald	Sale of lands in wicklow
KELO02/0002	Sarah Kelly	Debt Collection
AB8001/0001	George J Abbott	Sale 45 Somerset Road, Dublin 6
ABA001/0001	David Abrahams	Family Law
DEA001/0001	James Deane	RTA Whites Cross, Stillorgan
ZZZZZZ/ZZZZ	Non Assigned	Phone Message
AB8001/0005	George J Abbott	RTA The Rise, Stillorgan
ZAC001/0000	Irina Zacawski	0000 Matter
ABA001/0002	David Abrahams	RTA - Listowel

Case Alert

Open Matters	30
My Dormant Matters	22
No Case where expected invoice date has passed	0
No. case with no estimate given	29
No. case approaching estimate fee	1
No. case approaching invoice date	0

Task/Alert

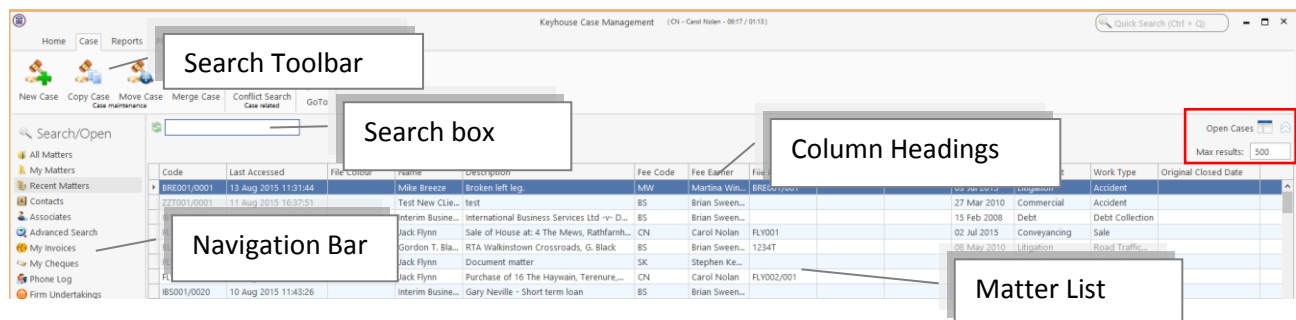
No Over Due Tasks	30
No Outstanding Tasks	32
Critical Tasks	1
Court Dates	2
High Priority Tasks	5
Phone Message	1
Undertakings	0
Statue Date Approaching	1

Performance

My Time Day Book	0:25
Time Recorded this Week	0:0
Time Recorded this Month	0:0
Fees Issued Current Month	0
Fees Issued Last Month	0
Fees Issued Year to Date	0
Outstanding Invoice	43,320
Outstanding Fees	35,038
Debtors Days	1,718
Current Work in Progress	2,359
Draft Invoice	0
Current Lockup Value	45,679

Chapter 2: Search & Open

The Search Screen



Tip: Click on a column headings to sort alphabetically by that heading eg. Matter Description or click on the pin to apply a filter **Fee Earner**. The filter is available on Fee Code, Fee Earner, Dept, WorkType, File Colour and closed only.



Tip: To remove filters right-click and then click on remove filters



Tip: The number of results returned can be set. The minimum number is 100 and the maximum number is 500.

Navigating the Search Screen

All Matters

Click on **All Matters** to list all matters.

My Matters

Click on **My Matters** to list all your matters

Recent Matters

Click on **Recent Matters** to list matters recently accessed.

My Contacts

Click on **My Contacts** to list all your clients and matters

Note this is for Fee Earners only.

Advanced Search

Click on **Advanced Search** to perform a more specific search on all matters.

My Invoices

Click on **My Invoices** to add, view or edit any draft invoices you have.

My Cheques

Click on **My Cheques** to add, view or edit any draft invoices you have.

Phone Log

Click on the **Phone Log** to add or view items in the phone log

Strong Room

Click on **Strong Room** to view or add items in your strong room.

Document Search

Click on **Document Search** to search all documents.

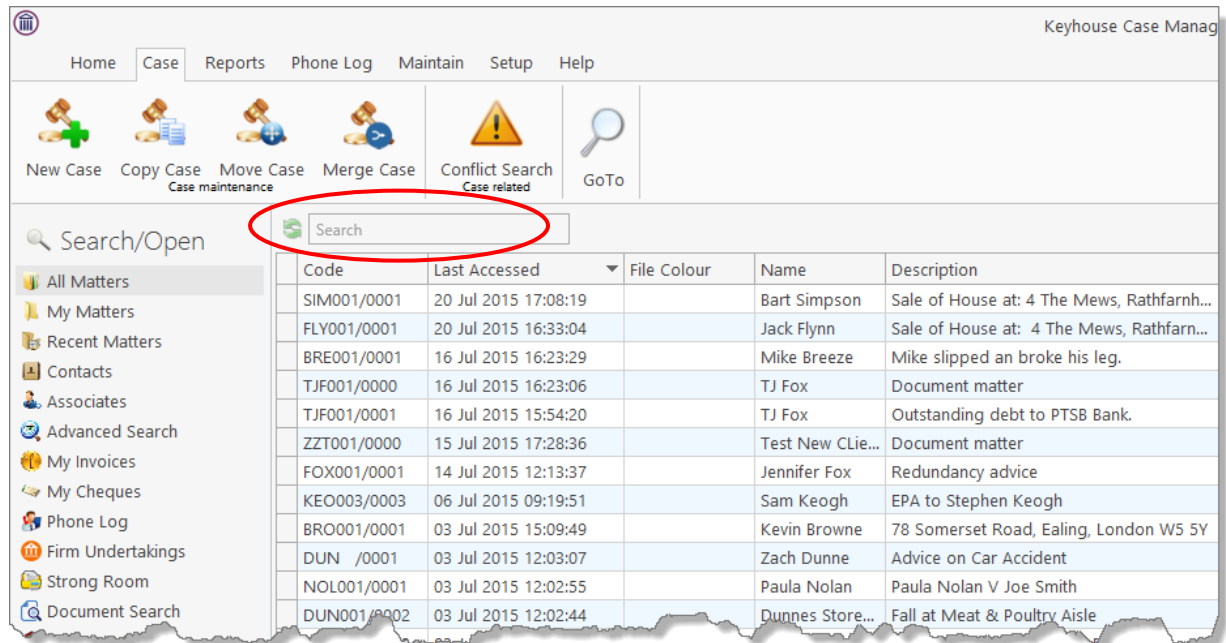
Template Library

Click on **Template Library** to Search and preview your precedent bank of documents.

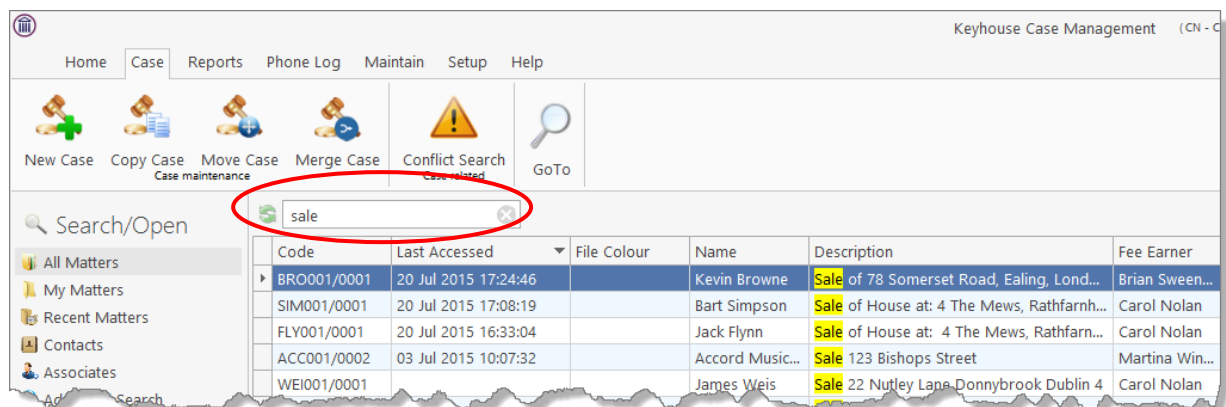
Search Lists

Search All Matters List

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



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

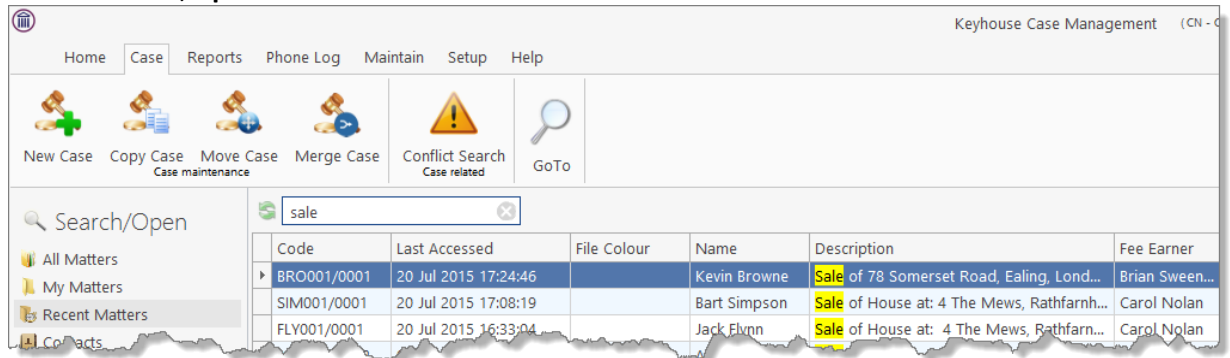


4. **Double click** the required matter to access the case diary for this matter.

Search Recent Matters

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

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



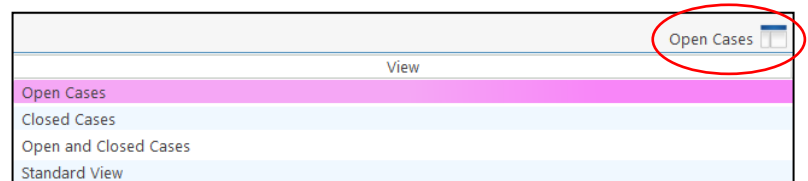
2. Click on Recent Matters in the Navigation panel.
3. **Input** a key search word in the **Search Box**; the search will be applied as you type eg. "Sale".
4. **Double click** the required matter to open the case diary for this matter.

How to Search Open and Closed Cases

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

2. Click on All Matters.

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



- Click on Closed Cases to search only closed cases
 - Click on Open Cases to search only open cases.
 - Click on Open and Closed to search both lists.
 - Click on Standard View to return to the default view.
4. **Input** a key search word in the **Search Box**: the search criteria will be applied as you type.
 5. **Double click** the required matter to open the closed case diary for this matter.

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

Search Contacts

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

Keyhouse Case Management (CN - Carol Nolan - 00:00 / 00:00)

Home Case Reports Phone Log Maintain Setup Help

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

Search/Open

My Contact

Search

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

Matters (AAA001)

Search

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

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

My Contact

Search

accord

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

Matters (ACC001)

Search

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



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

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

The Advanced Search

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

Keyhouse Case Management (C1 - Carol Nolan - 0000 / 0000)

Search: abrahams

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

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

Simple Search

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

"OR" Search

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

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

Search: Ireland

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

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

Sample Search:

Search For: **Ireland**

In fields: Client Name

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

“And” Search

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

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

Search:

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

And Client Name:

And Matter Desc.:

And Client Address:

And Matter Code: And Old Ref:

And Fee Earning: And Dept:

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

Sample Search “And”

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

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

My Matters

1. This will only allow you to see your matters. It will display them with the most recent at the top.

Search:

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

And Client Name:

And Matter Desc.:

And Client Address:

And Matter Code: And Old Ref:

And Fee Earning: And Dept:

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

2. By using the drop down arrow beside the Handler’s name, it is possible to view the matters of other individuals.

Searching using a Wildcard

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

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

Manipulating the Search Screen

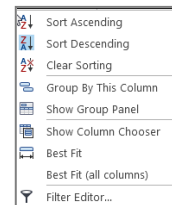
The new version of the Keyhouse Desktop has several user friendly options to allow you the user to alter the arrangement of your search screen. You can sort by column heading, filter or group and save for further use if required.

How to Sort Column Headings

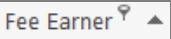
1. Click on the column heading to sort by that heading. See the example below the column the sort has been applied to column heading "Last Accessed".

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

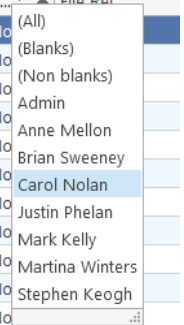
2. To remove the sort right-click on the column and select **Clear Sorting** from the resulting menu.



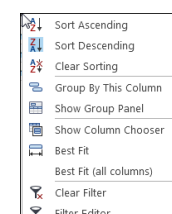
How to Filter Columns

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

Code	Last Accessed	File Colour	Name	Description	Fee Co...	Fee Earner	File Ref
▶ SIM001/0001	21 Jul 2015 09:53:45		Bart Simpson	Sale of House at: 4 The Mews, Rathfarnh...	CN	Carol No	
FLY001/0001	21 Jul 2015 08:45:22		Jack Flynn	Sale of House at: 4 The Mews, Rathfarnh...	CN	Carol No	
KEO003/0003	06 Jul 2015 09:19:51		Sam Keogh	EPA to Stephen Keogh	CN	Carol No	
FLY001/0002	03 Jul 2015 11:35:31		Jack Flynn	Purchase of 16 The Haywain, Terenure,...	CN	Carol No	
BLO001/0005	03 Jul 2015 10:58:17		Joe Bloggs	Advice File	CN	Carol No	
BOU001/0001	03 Jul 2015 10:28:10		Claire Bourke	Personal Injury at work	CN	Carol No	
AAA001/0003			AAA Securitie...	Slip and fall incident	CN	Carol No	
BEC001/0002			Angela Beck	23 Hill Street, Bray, Co Wicklow	CN	Carol No	
BEC001/0003			Angela Beck	Sale of 3 Main Street, Bray.	CN	Carol No	
BLO002/0003			David Bloggs	Sale 45 Hills Road, Tipperary	CN	Carol No	
CUL001/0001			Ann Marie Cul...	Credit Card Debit	CN	Carol No	



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



How to Group by Column

1. **Right-click** on the column you want to group by, to open the drop-down menu.
2. Select **Group By This column** from the menu. In the following example, grouping is by fee earner.

Search				
Code	Last Accessed	File Colour	Name	
▶ Fee Earner: Admin				
▶ Fee Earner: Anne Mellon				
▶ Fee Earner: Brian Sweeney				
▶ Fee Earner: Carol Nolan				

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

3. Expand or collapse a group by clicking on the **arrow** to its left, as in the following example.

Code	Last Accessed	File Colour	Name	Description
▶ Fee Earner: Admin				
▶ Fee Earner: Anne Mellon				
DUN001/0001	29 Oct 2014 21:03:07		John Dunne	Sale of Village Hall
AAA001/0003	24 Oct 2014 12:06:55		AAA Securitie...	Sale of 1 Main Street, Laragh, Co. Wicklow
ABA001/0001	12 Dec 2013 15:07:08		David Abraha...	Family Law
▶ Fee Earner: Brian Sweeney				
▶ Fee Earner: Carol Nolan				
▶ Fee Earner: Justin Phelan				

4. To add multiple group levels right-click on the column heading required and click on Group By This column. This example is first grouped by “fee earner and then by client”.

Fee Earner: Anne Mellon
▶ Name: AAA Securities Ltd
▶ Name: David Abrahams
▶ Name: John Dunne



To return to the standard view click on the view tool located on the search bar to show a list of available views. Select **Standard View**.

Standard View
View
Open Cases
Closed Cases
Open and Closed Cases
Standard View

Document Search

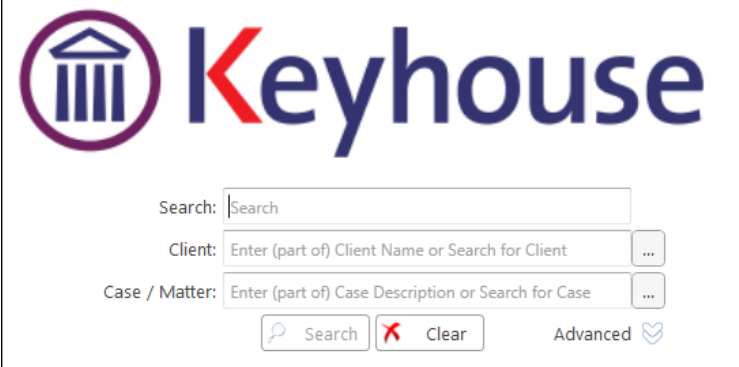
The document search utility makes it possible to search the full text of all documents on the system. A list of documents containing the search text is returned and each document can be previewed in the preview pane.

How to open the Document Search

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

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

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



The screenshot shows the Keyhouse Document Search interface. At the top left is the Keyhouse logo, which consists of a purple circle containing a white building icon with three columns, followed by the word "Keyhouse" in a blue sans-serif font. Below the logo are three search input fields. The first field is labeled "Search:" and contains the placeholder text "Search". The second field is labeled "Client:" and contains the placeholder text "Enter (part of) Client Name or Search for Client", with a small "..." button to its right. The third field is labeled "Case / Matter:" and contains the placeholder text "Enter (part of) Case Description or Search for Case", also with a small "..." button to its right. Below these fields are two buttons: a "Search" button with a magnifying glass icon and a "Clear" button with a red 'X' icon. To the right of these buttons is an "Advanced" link with a blue heart icon.

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

Chapter 3: Creating New Clients and Cases

The New Case Wizard

Create a New Case for an Existing Client

1. Select **New Case** which can be found on the **Case** tab of the Ribbon.
2. The **New Matter/Case Wizard** will open. The first screen contains a welcome message. Click **Next**.
3. The default option is to set up a new case for an existing client or contact.
4. Input all or part of the client's name or code in the search box. The search results will update as you type.



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

5. **Select the client** required and click **Next**. In this case, the wizard will skip Step 3 and you will move immediately to Step 4.
6. If the client is not an existing client or contact, select **Client is not listed above** and click **Next**.
7. The screen for Step 3 asks for details of the new client. Type the first three letters of the Client's surname into the box for **Client code**. The system will complete the code by adding three digits.
8. As well as **Client code**, **Client name** and **Fee Earners** are required fields.

The screenshot displays the 'New Matter/Case Wizard' interface across three steps:

- Step 1/7: New or Existing Client**
 - Navigation: Home, Case, Reports, Phone Log, Maintain, Setup, Help
 - Buttons: New Case, Copy Case, Move Case, Merge Case, Conflict Search, GoTo
 - Form: 'Select the option that describes the action you wish to take' with a radio button selected for 'Select an existing client for an matter'.
 - Table: Search results for 'keogh' showing client details.

Code	Name	Address
AAA001	AAA Securities Ltd	44 Main Street
AAA002	AAA Worldwide Removals	South Mall
ABA001	David Abrahams	123 Mayfair Street
ABB001	George J Abbott	60 Somerset Road,
ARR002	Abbie Lynch	14 The Mews
 - Buttons: Previous, Next
- Step 2/7: New or Existing Client**
 - Form: Search box contains 'keogh'. Results show 'KEO003 Sam Keogh' and 'ZZKE01 Stephen Keogh'.
 - Buttons: Previous, Next
- Step 3/7: Enter Client Details**
 - Form: 'Please enter the new clients details below.' with fields for Client code (* BAR), Client name (*), Salutation, Address, Telephone, Mobile, Fee Earners (*), Fax, Email, and Anti money laundering checked.
 - Buttons: Previous, Next

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

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

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

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

- Old Reference
- Your Reference (i.e. the client's reference, if any)
- Three additional reference fields, the prompts for which may vary from one system to another
- The ***Estimate of Fees*** – check the box if the fees are fixed
- The ***Expected Bill Date***
- The ***Budget Outlay***

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

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

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



If you choose to copy details from another matter, a new wizard will start. See the next section, **Copy Matter Details** for more information.

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

Copy Case Details



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

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

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

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

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

4. **Double-click** the matter from which the details are to be copied. The matter list will close and the code of the selected

case will be entered in the first box on the Step 2 screen.

5. Select the destination matter in the same way.

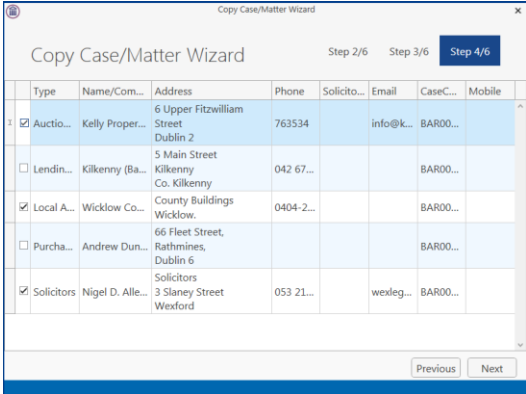
 **Note** if you started the **Copy Case wizard** from the final screen of the **New Case wizard**, the destination matter will already be filled in.

6. Click **Next** to continue to Step 3, which lists the **User Defined Fields (UDFs)** which are in use in the source matter.
7. The **UDFs** can be sorted, grouped and filtered as required, to make it easier to find and select those which are to be copied to the destination matter.
8. Check the corresponding boxes to select the fields which, together with their values, should be copied to the destination matter.
9. Click **Next** to continue to Step 4.

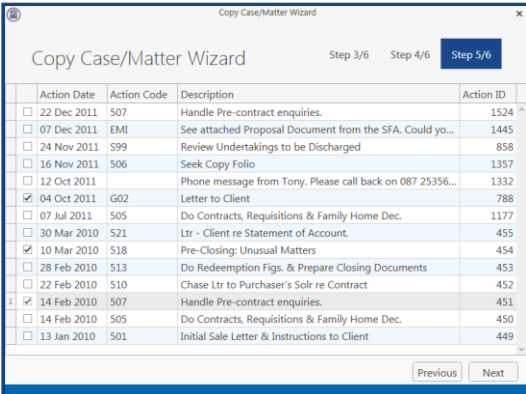
Code	Name	File Colour	Client Address	Description
AAA001/0004	AAA Securities Ltd		44 Main Street Dun Laoghaire Co Dublin	Sale of 2 High Street, London
AAB001/0007	George J Abbott		80 Somerset Road, Ranelagh, Dublin 6	Sale of 1 Main Street, Health, Co. Dub
CUL001/0001	Ann Marie Cullen		101 Dun Emer Drive Dundrum Dublin 14	Credit Card Debt
DUN001/0001	John Duane		44 Ellis Drive Rathmines Dublin 8	Sale of Village Hall
AAB002/0001	Abbey & Procter		14 The Mews Dublin 12	Commercial
FT002/0001	Melinda Fitzgerald		12 Eaton Brae Orwell Road Rathgar Dublin 14	Sale of lands in Wicklow
BLA001/0001	Gordon T. Black		23 Ellis Park, Rathmines, Dublin 6	R13A Walkinstown Crossroads, G. Black
BLA001/0000	Gordon T. Black		23 Ellis Park, Rathmines, Dublin 6	0000 Matter
AAA001/0003	AAA Securities Ltd		44 Main Street Dun Laoghaire Co Dublin	Sale of 1 Main Street, Laragh, Co. Wick
FT001/0001	Melinda Fisher		12 Eaton Brae Orwell Road Rathgar Dublin 6	Sale of Lands in Wicklow
DEA001/0000	James Deane		9 Northbrook Park, Ranelagh, Dublin 6	0000 Matter
CUL001/0001	Bill Clinton		Main Street Bray Co Wicklow	Unfair dismissal by State Department
KELO02/0002	Sarah Kelly		844 sandford Dundrum Dublin 14	Debt Collector
AAB001/0001	George J Abbott		80 Somerset Road, Ranelagh, Dublin 6	Sale 45 Somerset Road, Dublin 6
AAB001/0001	David Abrahams		123 Mayfair Street Dublin 2	Family Law

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

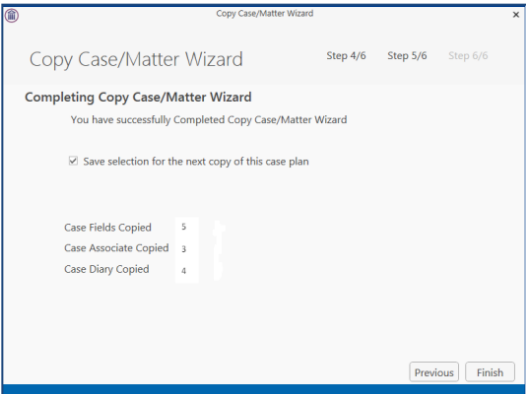
10. In Step 4, the **Case Associates** in the source matter are listed.
11. Again, you may filter or sort the Case Associates to make it easier to select those to be copied.
12. Check the corresponding boxes to select the Case Associates you wish to copy to the destination case.
13. Click **Next** to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



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



	Action Date	Action Code	Description	Action ID
☐	22 Dec 2011	507	Handle Pre-contract enquiries.	1524
☐	07 Dec 2011	EMI	See attached Proposal Document from the SFA. Could yo...	1445
☐	24 Nov 2011	S99	Review Undertakings to be Discharged	858
☐	16 Nov 2011	S06	Seek Copy Folio	1357
☐	12 Oct 2011		Phone message from Tony, Please call back on 087 25356...	1332
☒	04 Oct 2011	G02	Letter to Client	788
☐	07 Jul 2011	S05	Do Contracts, Requisitions & Family Home Dec.	1177
☐	30 Mar 2010	S21	Ltr - Client re Statement of Account.	455
☒	10 Mar 2010	S18	Pre-Closing: Unusual Matters	454
☐	28 Feb 2010	S13	Do Redemption Figs. & Prepare Closing Documents	453
☐	22 Feb 2010	S10	Chase Ltr to Purchaser's Solr re Contract	452
☒	14 Feb 2010	S07	Handle Pre-contract enquiries.	451
☐	14 Feb 2010	S05	Do Contracts, Requisitions & Family Home Dec.	450
☐	13 Jan 2010	S01	Initial Sale Letter & Instructions to Client	449



Completing Copy Case/Matter Wizard

You have successfully Completed Copy Case/Matter Wizard

☒ Save selection for the next copy of this case plan

Case Fields Copied: 5

Case Associate Copied: 3

Case Diary Copied: 4

Chapter 4: The Case Diary

What is a Case Diary

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

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

Standard View

The screenshot displays the 'Standard View' of the Keyhouse Case Management system. The interface is divided into several sections:

- Top Bar:** Includes navigation links (Home, Case, Reports, Phone Log, Maintain, Setup, Help) and a search bar.
- Left Sidebar:** Contains navigation options such as Case Diary, Document Manager, Current Client Details, Other Case Details, Associates, Critical Information, A/c Ledger, Time Ledger, Debt Ledger, Reserve Ledger, Undertakings, and Strong Room.
- Main Content Area:** Displays a table of tasks for Case BEC001/003. The table has columns for Date, Time, Handler, Synopsis, and Action. Tasks are listed chronologically, with some marked as completed (green checkmark) and others as future tasks (yellow warning icon).
- Right Panel:** Shows a 'Preview' of a selected document, including details like Sender, Subject, Recipient, Sent Date, and Type.

Callouts highlight specific features:

- Case Diary showing 1) Task completed 2) Future Tasks:** Points to the task table.
- Document Preview:** Points to the right-hand preview pane.
- Documents Generated:** Points to the 'Attachments' section at the bottom of the task table.

Configuring the Case Diary Screen

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

How to Configure your Case Diary Screen

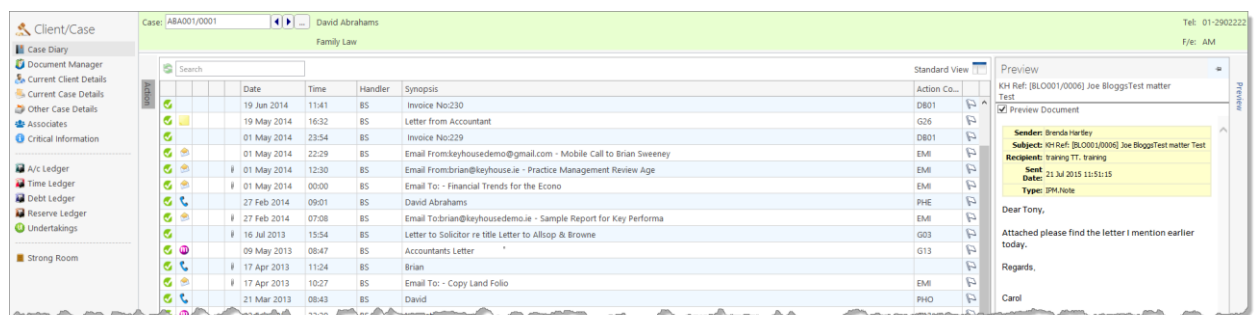
Now with the new version of the Case Diary each user can configure their diary screen according to their requirements. For example secretarial staff may generally prefer to view the case plan in their screen while solicitors might only need to see it occasionally.

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

Sample 1: Standard Screen with fixed Floating Document Preview Pane

How to create this view:

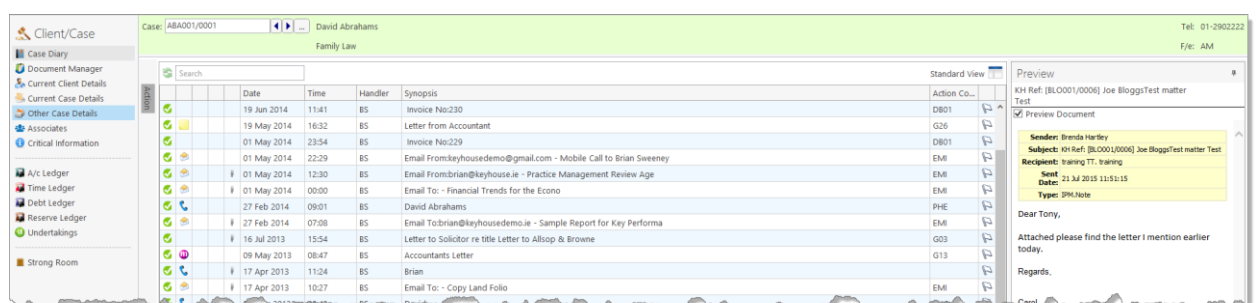
1. Move your mouse over **Preview** to the located to right of the Case Diary Screen the document preview pane will appear.



Sample 2: Standard view with fixed document preview pane

How to create this view:

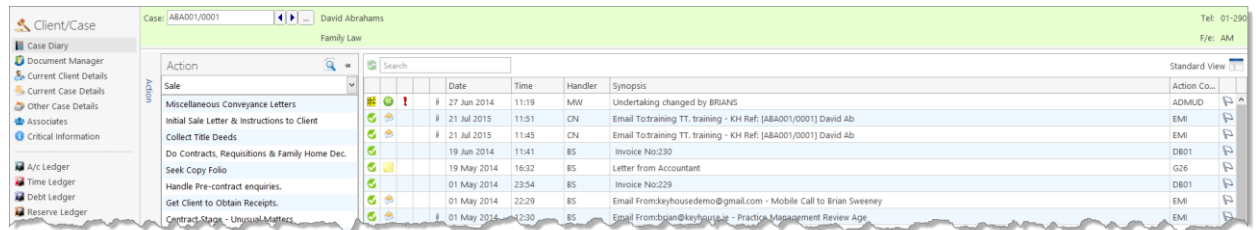
1. Move your mouse over **Preview** located to the right of the Case Diary Screen the document preview pane will appear.
2. Click on the Pin  to make it permanently visible.



Sample 3: Case Diary with Floating Case Plan

How to create this view:

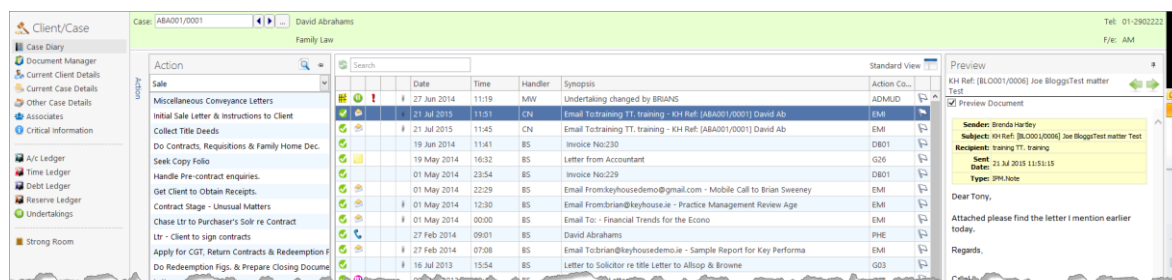
1. Move your mouse over **Action** to the located to left of the Case Diary Screen the Case Plan will appear.



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

How to create this view:

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



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

Warning Messages

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



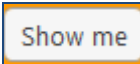
Caution: Please read any warnings specific to the file as they could be vital information specific to this case.

How to Show or Ignore a Message

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

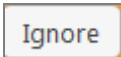
Case: AAA001/0001	AAA Securities Ltd Landlord Dispute	Tel: 0121121112 F/e: MW
WARNING : Invoices outstanding over 2 Years 9 Months .		Ignore Show me
WARNING : No activity on this file in over 33 months.		Ignore Show me
WARNING: Only speak to John Dunne with calling this client.		Ignore Show me

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

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

Case: AAA001/0001		AAA Securities Ltd Landlord Dispute	
Only speak to John Dunne with calling this client.			
☒ Show Alert			
Account Summary		Action Summary	
Debtors A/c	7,396.75	Start Date	06 Jun 2010
Outlay A/c	94.63	File Colour	
Outlay Budget	0.00	Solicitor	Martina Winters
Current Outstanding Fees	6025.00	Statute Date	
Client A/c	0.00	Case Status	
Client Current	0.00	Who	Date
Client Deposit	0.00	Last Action	BS 06 Feb 2012
Current Locked up value	7,491.38	Last Milestone Action	
Total Work In Progress	0.00	Next Action	
Write off time	0.00	Last Record Time	MW 01 Sep 2011
Fees issued to date	6025.00	Description	Client Meeting re issue with planning
Fees To Date + WIP	6,025.00		
Estimate Fees	0.00		
Draft Invoices	0.00		
Last Bill Date	01 Feb 2012		
Expected Bill Date			
Possible value to the client	0.00		
Work In Progress			
Martina Winters	8:20		
	0:00		
Activity			
Research	1:28	367.50	
Letter Drafting	1:10	290.00	
Attendance	0:35	145.00	
Advice			

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

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

Case Diary Symbols

Tasks in Yellow denote milestone tasks.

	12 Dec 2013	14:53	CN	Contract Stage
---	-------------	-------	----	----------------

Tasks with a Broken Yellow Box denote documents processed.

		01 Nov 2014	11:36	CN	Searches
---	--	-------------	-------	----	----------

Tasks with a Green Tick denote a completed task.

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

Tasks with a Red Dot denote a high priority task.

					27 Oct 2015	10:17	CN	Statute of Limitations Date =30 Oct 2015
--	--	--	--	--	-------------	-------	----	--

Tasks with S denote a Statute of Limitation date or a critical date action.

					27 Oct 2015	10:17	CN	Statute of Limitations Date =30 Oct 2015
--	--	--	--	--	-------------	-------	----	--

Tasks with a Calendar Symbol denote an appointment.

					10 Aug 2015	14:22	CN	Review PIAB application
--	--	--	--	--	-------------	-------	----	-------------------------

Tasks with a Phone Symbol denote a phone call.

					03 Jul 2015	11:19	CN	Mike Breeze
--	--	--	--	--	-------------	-------	----	-------------

Tasks with a yellow note denote a Note.

					01 Nov 2014	11:40	CN	Ring Client re. bank statements
--	--	--	--	--	-------------	-------	----	---------------------------------

Tasks with a hand denote a delegated task.

					01 Nov 2014	11:40	CN	Ring Client re. bank statements
--	--	--	--	--	-------------	-------	----	---------------------------------

Tasks with a blue arrow denote tasks of low importance.

					07 Aug 2015	14:22	CN	Check on PIAB acknowledgement (s 50)
--	--	--	--	--	-------------	-------	----	--------------------------------------

Tasks with U denote an Undertaking.

					01 Nov 2014	11:49	AM	Undertaking Created:
--	--	--	--	--	-------------	-------	----	----------------------

Tasks with an envelope denote an email sent or received.

					16 May 2012	11:13	BS	Email From:Martina Winters - Mutual Confident
--	--	--	--	--	-------------	-------	----	---

Tasks with a document attached

					03 Jul 2015	14:40	COM	Conflict Search
--	--	--	--	--	-------------	-------	-----	-----------------

Tasks with an M denote scanned post

					14 Aug 2015	14:22	CN	Letter Special Damages schedule from PIAB
--	--	--	--	--	-------------	-------	----	---

Tasks with a C denote critical tasks

					14 Aug 2015	14:22	CN	Letter Special Damages schedule from PIAB
--	--	--	--	--	-------------	-------	----	---

Task with a building denote Court Dates

					26 Aug 2015	16:24	CN	Court Date
--	--	--	--	--	-------------	-------	----	------------

The Case Diary Toolbar

 New Item Actions	New	Click on the New to add any of these tasks.	 Action  Note  Email  Appointment  Phone Message  Dictation  Draft Invoice  Request Cheque  Conflict Search
 Print	Printer	Click to print any of the following reports:	 Activity Report  Case Summary Report  Matter Label  Client Label
 Capture	Capture	Click on capture to launch the document capture program to import documents or folders of documents or images.	
 Generate	Generate	Click to generate a document for a selected action.	
 Complete Action	Complete Action	Click to mark a task as complete.	
 Start Timer	Start Timer	Click to start the timer for the current case.	
 Post Time	Post time	Click to bring up a manual time slip.	

Navigation within the Case Diary

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

Case: FIS001/0001	Case Code	Case Code of current open case.
		Or
		To open a case input the case code and press enter.
	Navigation buttons	Move to the previous Case or go to Next Case.
	Search Case List	Click to search for an existing Case. Double click the required case to open.
	Quick Search	This button is available on all screens and will allow you to quickly find any case.

Case Diary Navigation Panel

 Case Diary	Case Diary	Case Diary Screen
 Document Manager	Document Manager	Click on this to launch the Document Manager
 Current Client Details	Current client Details	Click on this to view or edit the current client details.
 Current Case Details	Current Matter Details	Click on this to view or edit the current case/matter details.
 Other Case Details	Other Case Details	Click on this to view other case details
 Associates	Associates	Click on this to view case associates i.e. professionals or parties connected to this case.
 Critical Information	Critical Information	Click on this to view critical information particular to this case.
 A/c Ledger	Accounts Ledger	Click on this to view the accounts ledger.
 Debt Ledger	Debt Ledger	Click on this to view the debt ledger.
 Time Ledger	Time Ledger	Click on this to view the time ledger.
 Reserve Ledger	Reserve Ledger	Click on this to view the reserve ledger.
 Undertakings	Undertakings	Click on this to view the undertakings on this case.
 Strong Room	Strong Room	Click on this to view items in your strong room.
 Case Diary	Case Diary	Case Diary Screen

Amending Client and Case Details

Updating Client Details

1. **Open** a case in the **Case Diary**.
2. Click on **Current Client Details**  located on the **Navigation** panel the following window will appear.

Input the following information as required:

General	Input/Amend information on the client's name, address, telephone numbers etc.
Client Contacts	Click on Client Contacts to add additional client contacts for example the client's spouse or if the client is a company add an employee's details.
Notes	Click on the Notes Tab to enter notes relating to the client.
Matters	Click on the Matters tab to view a list of all active matters assigned to this client.
Cross Reference	Click on Cross Ref tab to cross reference the client with another for example a husband and wife.
Categories	Click on Categories tab to add the client to a category.
Corporate	Click on Corporate tab to add the company details e.g. Company Registration Number.
Personal	Click on the Personal tab to add the client's personal details for e.g. Date of Birth, Date of Marriage etc.
Legal Details	Click on the Legal Details tab to add the legal details about the client. E.g. Legal Name.
Permission	Click on the Permission tab to control access at a client level
Billing Details	Click on the Billing Details tab to add information on the billing details of this client.

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

Updating Case Details

1. **Open** a case in the **Case Diary**.
2. Click on **Current Case Details**  **Current Case Details** located on the **Navigation** panel.
3. Input/Amend the following details as required:

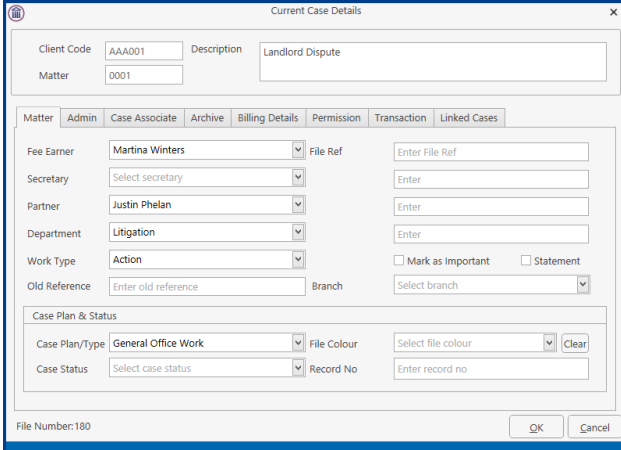
Matter

Input/Amend any details relating to the matter description.

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

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

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



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

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

Admin

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

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

Comments Input any comments.

Charge Rate Level: Using the option buttons, select a charge rate level

Effectively complete Tick if the case is effectively complete.

Case Associate

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

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

Other Details

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



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



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

Archive

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

Billing Details

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

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

Using the option buttons, select the billing type and default billing method.

Permissions

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

Transaction

Click on **Defendant** or **Client** tab.

Then click on the **Post Button** to add a transaction.

Click on the **Change Button** to amend an existing transaction.



Note the balance will automatically update.

Linked Cases

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

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

Inserting a Statute of Limitations Date

- Open a case in the **Case Diary**.
- Click on **Current Case Details** located on the case Diary shortcut bar.
- Click on the **Admin Tab**.
- Input** a Statute Date or click on the down arrow to select a date from the calendar.
- Click OK** to save the changes.

- The Statute Date will now appear as a task in the Case Diary assigned to the case Fee Earner and dated prior to the actual Statute of Limitations Date for reminder purposes.

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

Case: AAAD01/0001 ... AAA Securities Ltd Landlord Dispute						Tel: 01211211 F/e: MW	
WARNING : Statute date approaching on this case.						Ignore	Show me
WARNING : No activity on this file in over 33 months.						Ignore	Show me
Search						Standard View	
Action		Date	Time	Handler	Synopsis	Action Co...	
		27 Oct 2014	16:08	CN	Statute of Limitations Date =06 Nov 2014	ADMSD	
		06 Feb 2012	10:50	BS	Review File	G16	
		01 Feb 2012	17:43	BS	Invoice No:225	DB01	

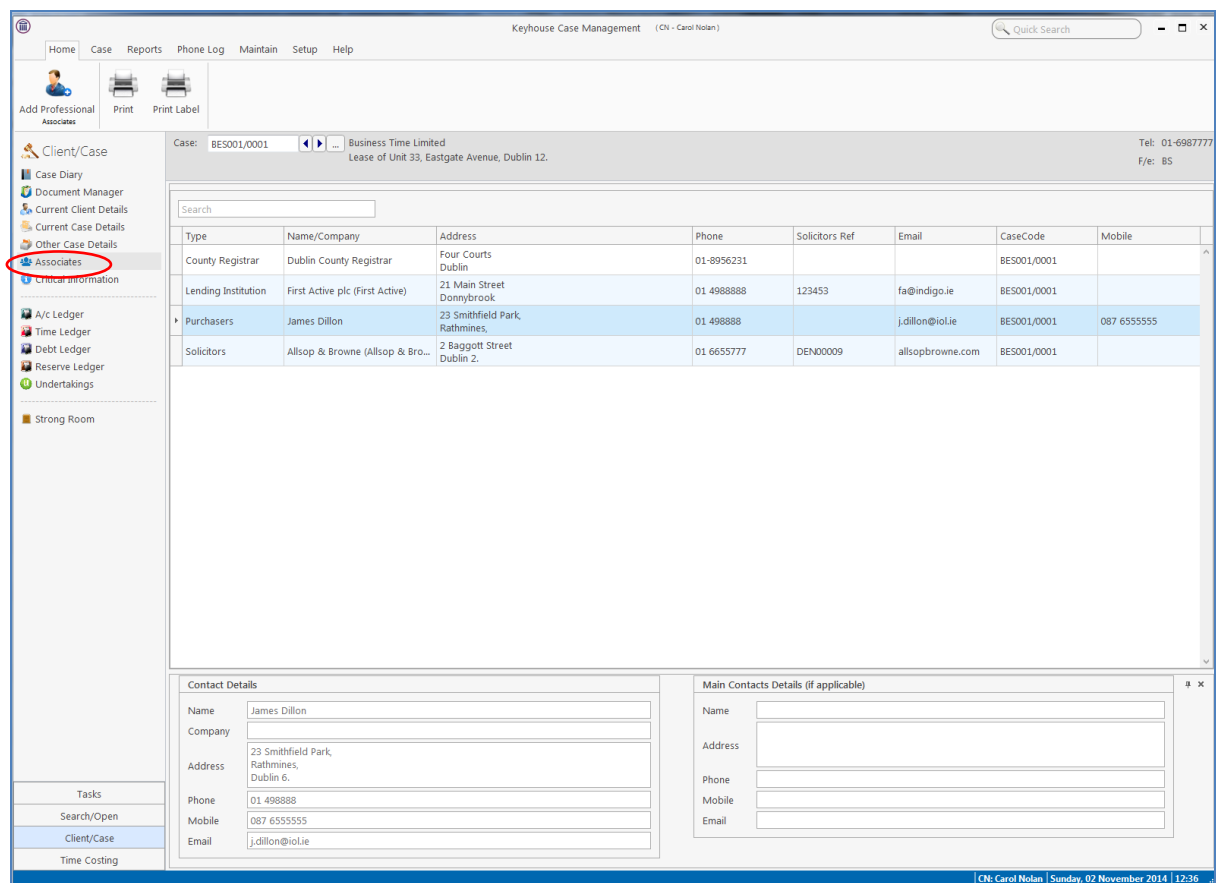
Case Associates

What are Case Associates?

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

How to add an existing case associate to a case

1. Open a case in the Case Diary.



Keyhouse Case Management (CN - Carol Nolan)

Home Case Reports Phone Log Maintain Setup Help

Add Professional Associates Print Print Label

Client/Case

Case: BE5001/0001 Business Time Limited
Lease of Unit 33, Eastgate Avenue, Dublin 12. Tel: 01-6987777
F/e: BS

Search

Type	Name/Company	Address	Phone	Solicitors Ref	Email	CaseCode	Mobile
County Registrar	Dublin County Registrar	Four Courts Dublin	01-8956231			BE5001/0001	
Lending Institution	First Active plc (First Active)	21 Main Street Donnybrook	01 4988888	123453	fa@indigo.ie	BE5001/0001	
Purchasers	James Dillon	23 Smithfield Park, Rathmines,	01 498888		j.dillon@iol.ie	BE5001/0001	087 6555555
Solicitors	Allsop & Browne (Allsop & Bro...)	2 Baggott Street Dublin 2.	01 6655777	DEN00009	allsopbrowne.com	BE5001/0001	

Tasks

Search/Open

Client/Case

Time Costing

Contact Details

Name: James Dillon

Company:

Address: 23 Smithfield Park,
Rathmines,
Dublin 6.

Phone: 01 498888

Mobile: 087 6555555

Email: j.dillon@iol.ie

Main Contacts Details (if applicable)

Name:

Address:

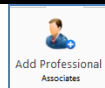
Phone:

Mobile:

Email:

CN: Carol Nolan | Sunday, 02 November 2014 | 12:36

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



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

Case: BES001/0001 Business Time Limited
Lease of Unit 33, Eastgate Avenue, Dublin 12. Tel: 01-6967777
F/e: BS

Type	Name/Company	Address	Phone	Solicitors Ref	Email	CaseCode	Mobile
County Registrar	Dublin County Registrar	Four Courts Dublin	01-8956231			BES001/0001	
Lending Institution	First Active plc (First Active)	21 Main Street Donnybrook	01 4988888	123453	fa@indigo.ie	BES001/0001	
Purchasers	James Dillon	23 Smithfield Park, Rathmines,	01 498888		j.dillon@iol.ie	BES001/0001	087 6555555
Solicitors	Allsop & Browne (Allsop & Bro...	2 Baggott Street Dublin 2.	01 6655777	DEN00009	allsopbrowne.com	BES001/0001	

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

Add Case Associate Professional

Action: Import Export Add Edit Delete Print Party Print Lables

Associate Type: Insurance Company, Investment Company, Land Registry, Lending Institution, Local Authority, Other Party, Plaintiff, Public Authority, Purchasers, Respondant (Family Law), Sheriff, **Solicitors**, Surveyors, Third Partie, Town Agents, Vendors

Associates:

Code	Name/Company	Address	Phone No	Category	Type	Notes
ACT001	Actons(Actons)	Solicitors 22/24 Lower Mount Street			Solicitors	
ADA002	Brian P. Adams(Bria...	Solicitors Cormac Street	0506 21...		Solicitors	
ADA003	Adams Corporate(A...	Solicitors 9 Exchange Place			Solicitors	
ADAM01	Brian P. Adams(Bria...	Solicitors Cormac Street,	0506-21...		Solicitors	
AHE001	Marian Ahern(Mari...	Solicitor Knockvica			Solicitors	
AHE002	Aherne Swift(Ahern...	Solicitors 51 O'Connell Street	051 879...		Solicitors	
AHER01	Ahern O'Shea & Co...	Solicitors 13/16 Dame Street	6794477		Solicitors	

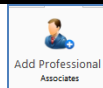
Ok Cancel

- Click in the **Search box** and **input** part of the solicitor's name; the search will be applied as you type.
- Double Click** on the relevant Solicitor to assign it to the case.

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

How to add a New Case Associate to a Case

- Open** a case in the **Case Diary**.
- Click on **Associates** on the **Navigation** panel

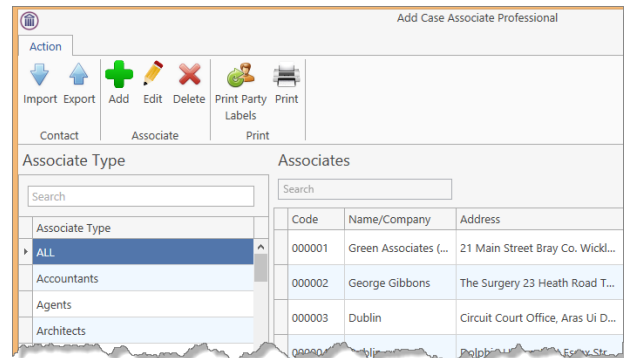


3. Click on **Add Professional** on the Home tab of the Ribbon.

4. Click on the **Category** of case associate you want to add e.g. Bank.

5. Alternatively, click in the **search box** and **input** a key search word the search criteria will be applied as you type.

6. If no record is found then add a new record.



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

8. **Input** the relevant information

Full Name: Input the Full Name

First Name

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

Salutation: Input the Salutation

Company: Input the company name

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

Address: Input the address

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

Phone No: Input the main phone number

Fax No: Input the fax number

Home: Input home phone number

Mobile: Input mobile phone number

E-Mail: Input e-mail address

DX Ref: Input the Document Exchange reference if applicable

Nominated: Tick is this is the nominated contact.

County: Input the county.

Post Code: Input the post code.

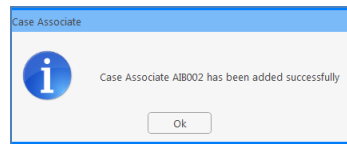
9. If you want to add a **Contact** to this associate click on **New** the following window will appear.

Input the following details as required:

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

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

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



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

How to amend a Case Associates Details

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





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

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

General

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

Details

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

Other Types

Click on the **Other Types** tabs to see if this associate is a member of any other category.

Other Details (optional)

Click on the **Other Details tab** to add a specific court and court date.

Notes

Click on the **Notes tab** to add additional notes about the case associate.

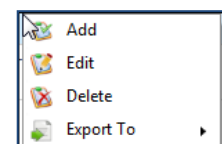
Other Case Involvements

Click on the **Other Case Involvements tab** to view a list of cases this case associate is connected to.

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

How to Remove a Case Associate from a Case

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



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

How to add a Contact to a Case Associate

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

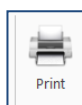


3. Enter the required information and click OK. As the address of the Associate is already in the system it is not necessary to re-enter it on this screen.

4. To assign the Contact to the case click the  button.

Print Options

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



Print

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



Print Label

Select a Case Associate and then click **Print Label**.

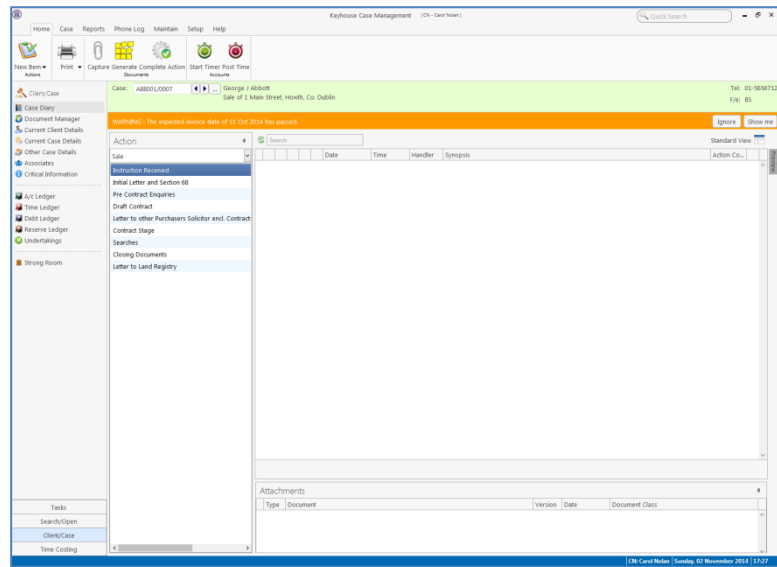
Generating Tasks

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

How to Generate a Task

1. Open a case in the Case Diary
2. To view the case plan move your mouse over **Action** located to left of the Case Diary Screen the Case Plan will appear.
3. Click on the **Pin**  to make it permanently visible.

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



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

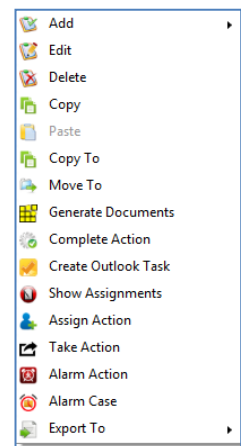
Method 1: **Double Click** the task you want to generate from the list of tasks in the case plan.

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

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

Or

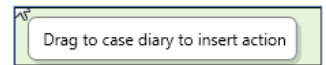
- 1) Right click on the task
- 2) Select Generate Documents from the pop-up menu.



Working with Tasks in the Case Diary

How to Insert Tasks in the Case Diary

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

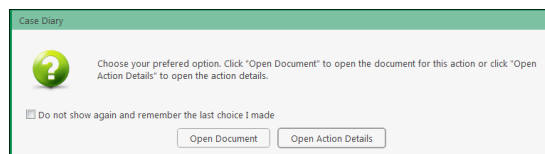


Changing Tasks

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

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

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



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

- a. On the **General Tab** amend the following details:

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

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

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

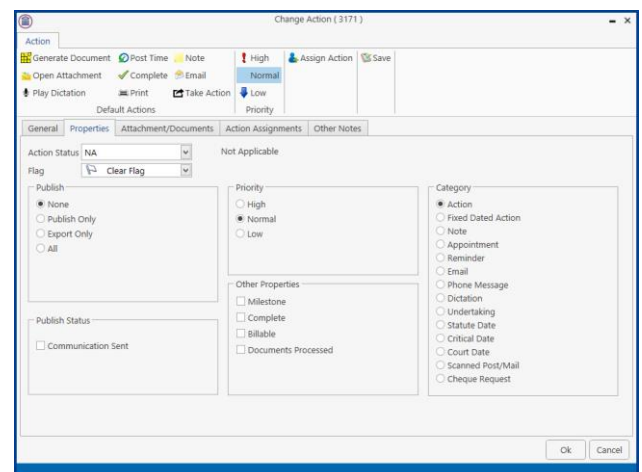
Due Date Click on the **down arrow** to reveal a calendar click on the required due date.

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

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

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

- b. Click on the Properties tab to reveal the following screen.



Amend the following details as required:

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

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

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

Priority **Select** the appropriate priority status.

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

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

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

The following actions can be performed in this window

Date Entered	Document	Version	Doc Class	Track Reference	File Path
10 Dec 2013	Letter to PIAB	1	Letters/Interparty Cor...	1364	\\hellie-PC\Keyhouse
10 Dec 2013	Letter to Client	1	Letters/Interparty Cor...	1365	\\hellie-PC\Keyhouse
10 Dec 2013	Index to Application	1	Document	1366	\\hellie-PC\Keyhouse
10 Dec 2013	PIAB Bill of Costs	1	Document	1367	\\hellie-PC\Keyhouse

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

Attachments

Type	Document	Version
	PIAB Bill of Costs	1
	Index to Application	1
	Letter to Client	1
	Letter to PIAB	1

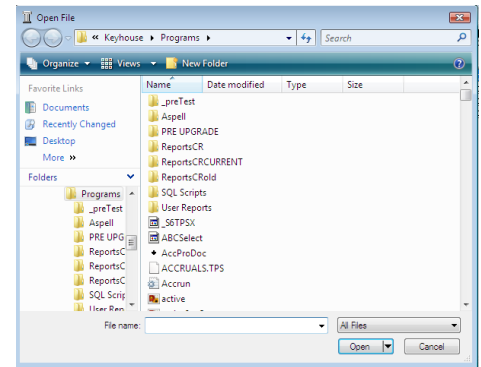
Open an attachment

- Double Click** on the attachment you want to open.
- Or Click on **Open Attachment**

- iii. The Word Document will then open in Word to edit, print etc.

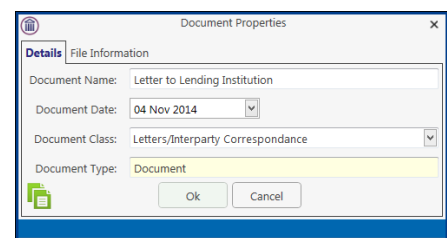
Add an attachment to a task

- i. Click on the **Add attachment** . The following dialogue box will appear.
- ii. **Browse** and locate the required document.
- iii. Click **OK**. The document will now appear the attachment list.



Amend an attachments properties

- i. **Select** the document you want to amend.
- ii. Click on the **edit attachment**  located on the toolbar. The following dialogue box will appear.
- iii. **Amend** the following details as required



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

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

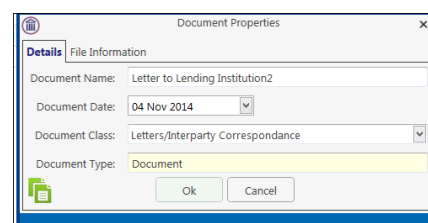
- iv. Click **OK** to save the changes.

Delete an attachment

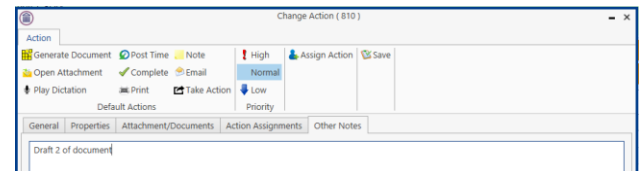
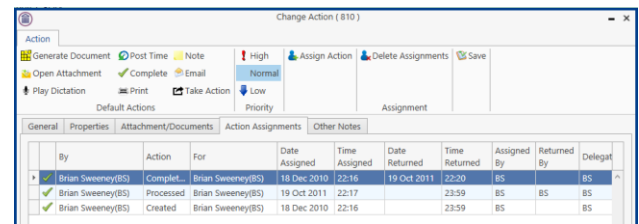
- i. **Select** the attachment you want to delete.
- ii. Click on **delete attachment** .
- iii. Click **OK** to confirm the deletion.

Copy and Paste an attachment

- i. Select the attachment you want to copy.
- ii. Click on **Copy** .
- iii. Open the task you want to **Paste** the document in. Click on the Attachment/Documents Tab.
- iv. Click **Paste** . The following attachment properties box will appear.
- v. Amend the details as required and OK to confirm.



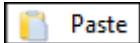
- vi. A **message** will appear asking you to confirm the update, click **Yes** to confirm
 - vii. A copy of the document will then appear in the document list.
 - d. Click on the **Action Assignments tab** to show the assignment history of the task. See the section on Assigning Tasks for further information.
 - e. Click on the **Other Notes tab**; the following screen will appear. Input any notes you may have on the task.
3. Click **OK** to save any changes made.

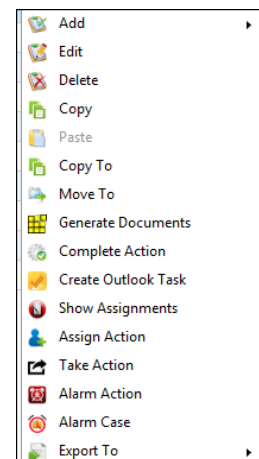


Deleting a Task

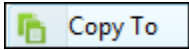
1. **Right Click** on the **task** in the **case diary** the following menu will appear.
2. Click on **Delete** 
3. You will be asked to confirm the deletion. Click **Yes**. If the task has been generated you will be asked if you want to delete the documents generated. If you click the **Yes** button, the documents will be deleted.

Copying a Task

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



Copying a Task to another matter

1. **Right Click** on the **task** in the **case diary**: the menu above will appear.
2. Click on **Copy To** 
3. A list of cases will appear search for the required case.
4. Then **Double click** to select.

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

Moving a Task to another matter

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

2. Click on **Move To** 

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

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

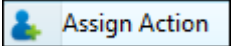
 **Note:** You will automatically move to the case diary of the case selected.

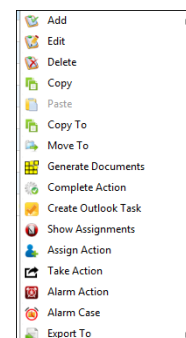


TIP: TO DELETE, MOVE OR COPY MULTIPLE TASKS :

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

Assigning a Task to Another Handler

1. **Insert** the task in the case diary.
2. **Right click** on a task the following menu will appear
3. Click on **Assign Action**. 
4. A screen will appear listing all **resources**.

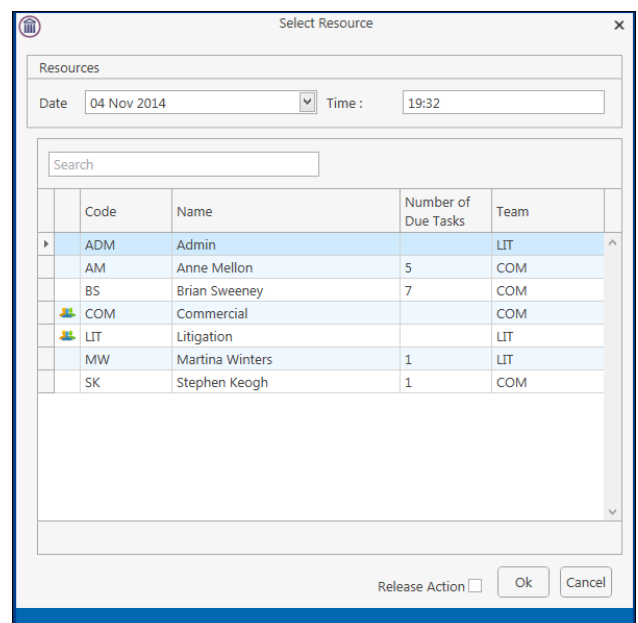


5. Double Click on the **resource** person you want to assign the task.
6. Check the **Release Action** box to remove the task completely from your task list.

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

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

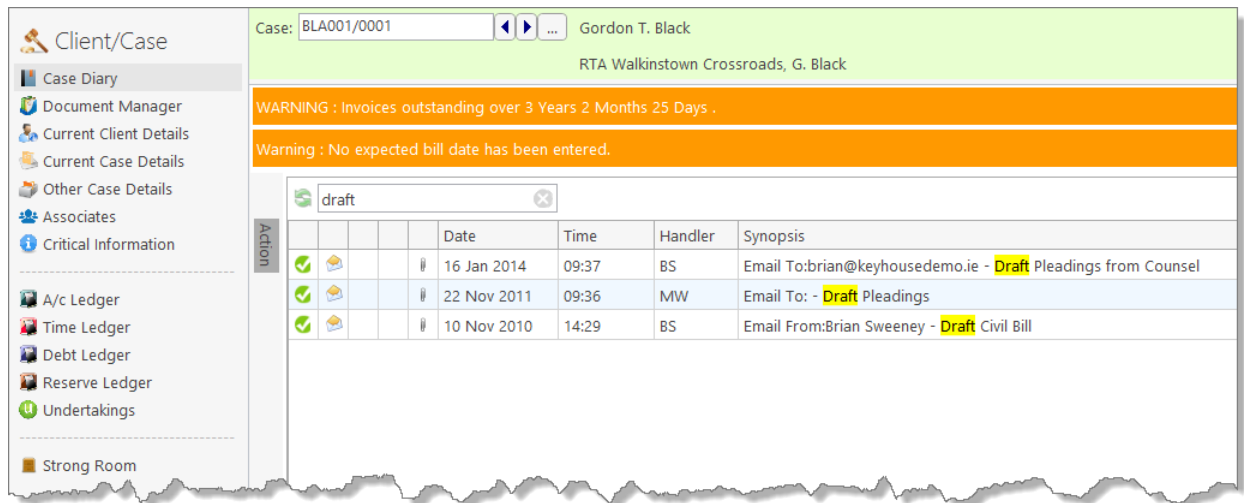
7. You will return to the **action assignment** window.
8. Click **OK** to save the changes.



Searching, Sorting and Filtering the Case Diary

How to Search the Case Diary

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



3. **Input** the key search words, the search criteria will be applied as you type.
4. All tasks containing the search criteria will be displayed in the case diary below. See the example above of a search for “draft”.
5. Click **cancel** to reset.



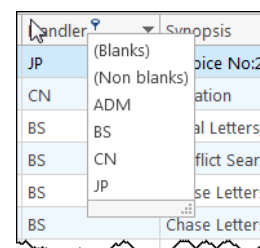
Tip to refresh the Case Diary click on refresh tool located next to the search box on the search bar.

How to sort and filter the Case Diary Columns

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

How to filter Case Diary Columns

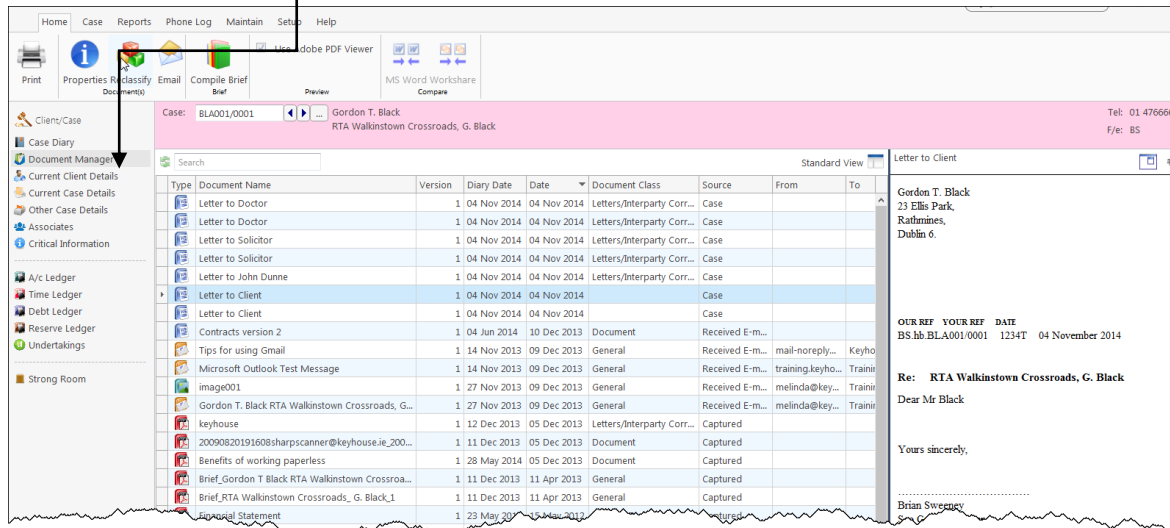
1. Open a case in the Case Diary.
2. Move your mouse to the required column heading.



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

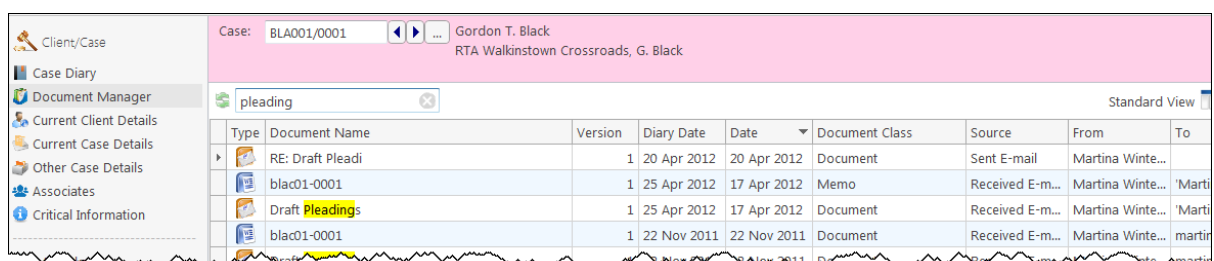
How to view all documents on a case

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



How to search for a document on a case

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



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

Note: For information on the document manager see Chapter 16.

Processing Documents

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

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

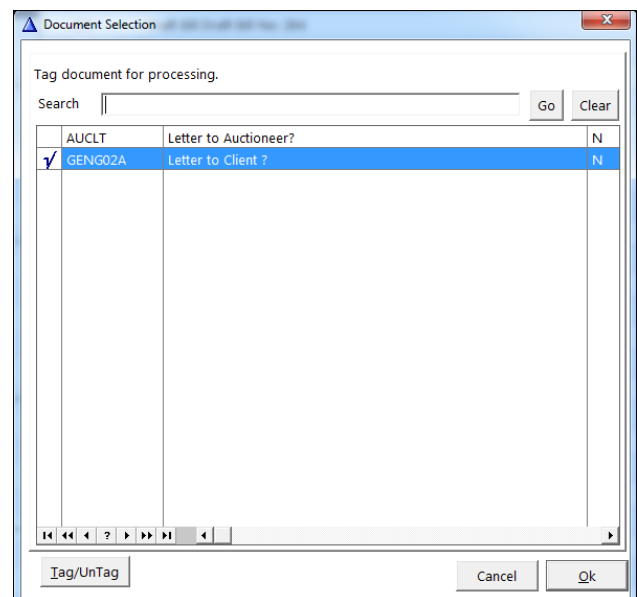
What type of information is requested when processing documents?

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

Select Documents to be processed

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

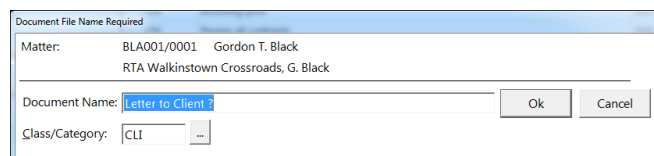
1. A **Document Selection** dialogue box will appear.
2. **Tag** the documents you want to process by putting a tick next to each document that is to be generated.
3. Click **OK** and the documents tagged will be generated.



Naming and classifying a Document

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

1. The following dialogue box will appear requesting the user to input a document name. **Input** an appropriate name.



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

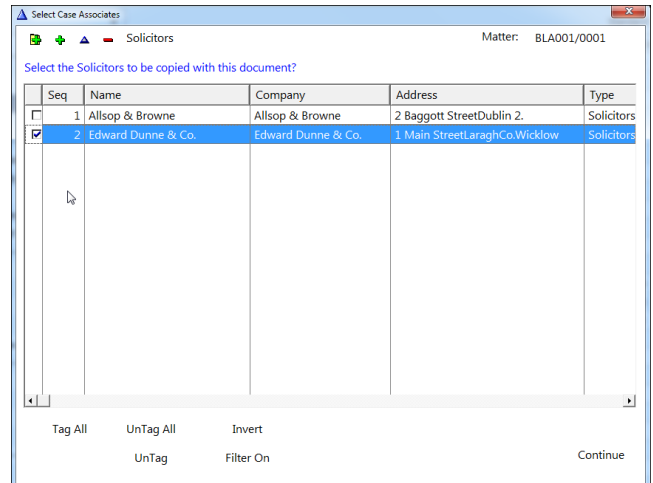
Adding Case Associates when generating a document

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

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

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

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



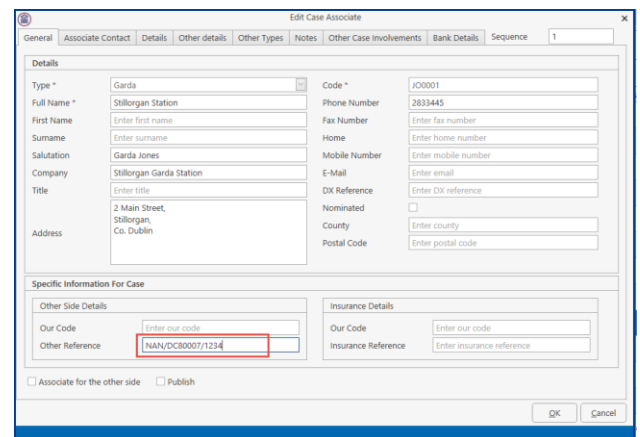
Select Case Associates

Matter: BLA001/0001

Select the Solicitors to be copied with this document?

Seq	Name	Company	Address	Type
☐	1 Allsop & Browne	Allsop & Browne	2 Baggott StreetDublin 2.	Solicitors
☒	2 Edward Dunne & Co.	Edward Dunne & Co.	1 Main StreetLaraghCo.Wicklow	Solicitors

Tag All UnTag All Invert UnTag Filter On Continue



Edit Case Associate

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

Details

Type * Garda Code * JO0001

Full Name * Stillorgan Station Phone Number 2833445

First Name Enter first name Fax Number Enter fax number

Surname Enter surname Home Enter home number

Salutation Garda Jones Mobile Number Enter mobile number

Company Stillorgan Garda Station E-Mail Enter email

Title Enter title DX Reference Enter DX reference

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

Specific Information For Case

Other Side Details Insurance Details

Our Code Enter our code Our Code Enter our code

Other Reference NAN/DC80007/1234 Insurance Reference Enter insurance reference

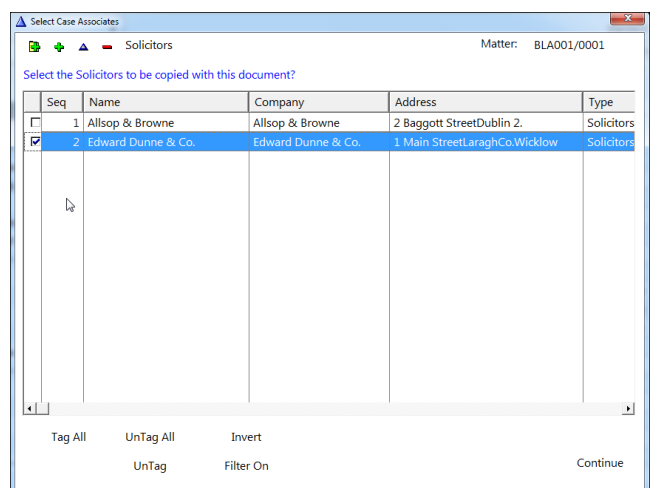
☐ Associate for the other side ☐ Publish

OK Cancel

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

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

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



Select Case Associates

Matter: BLA001/0001

Select the Solicitors to be copied with this document?

Seq	Name	Company	Address	Type
☐	1 Allsop & Browne	Allsop & Browne	2 Baggott StreetDublin 2.	Solicitors
☒	2 Edward Dunne & Co.	Edward Dunne & Co.	1 Main StreetLaraghCo.Wicklow	Solicitors

Tag All UnTag All Invert UnTag Filter On Continue

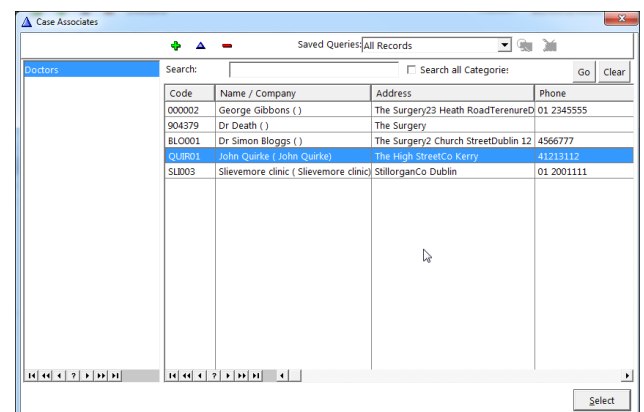
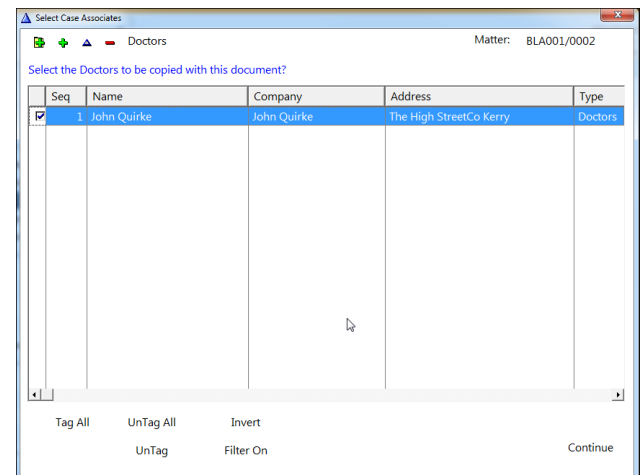
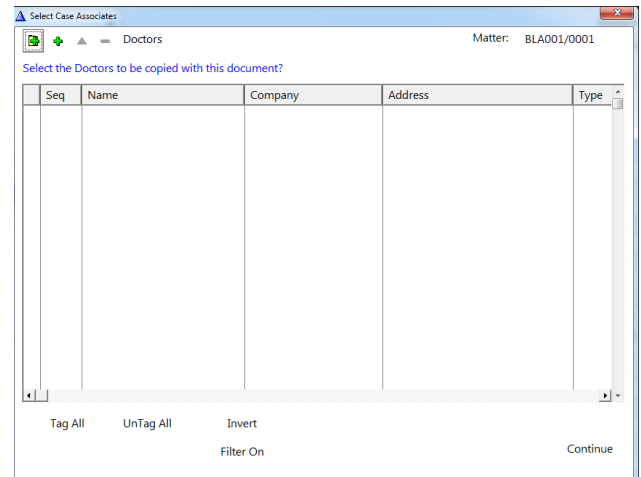
Example 2: Letter to Doctor – Setting up a new case associate

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

1. The following dialogue box has appeared requesting the user to select a Doctor for this letter.
2. No doctors have been assigned to this case so the user needs to add one.
3. Click on the **Green Plus with the yellow folder**  and the following screen will appear.
4. The doctor the user wants to write to is not available on the list so a new doctor needs to be setup.

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

5. Click on the **Green Plus**  to add the new Doctor. See the section on **Adding a New Case Associate** for further details.
6. Then click on **Select** . The following screen will reappear listing the doctor assigned to the case.
7. Using the tick boxes provided **tag** the required Doctor and click **Continue**.
8. Word will open showing the letter to doctor
9. **Edit** the document in Word as normal as required.
10. **Save** any changes and **Print** as required.
11. The task and document will then be available in the Keyhouse Case Diary for further review.



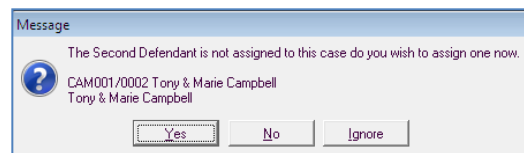
Example 3: Letter to Lending Institution – Where there is only one lending institution and it's already present in the case associates.

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

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

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

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



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

Or

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

Or

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

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

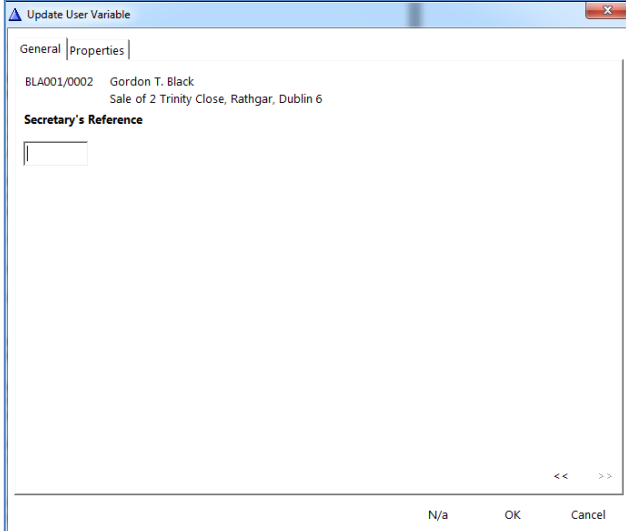
Answering UDF Questions

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

Example of UDF Question: Sale Price of Property

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

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



Update User Variable

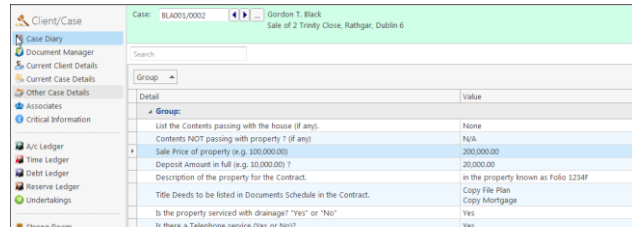
General | Properties

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

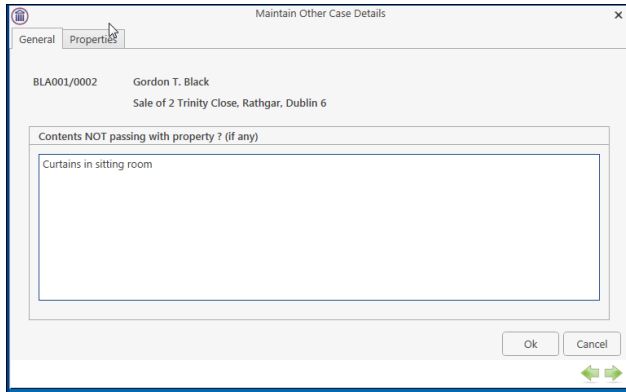
Secretary's Reference

<< >>

N/a OK Cancel



Detail	Value
Group	
List the Contents passing with the house (if any).	None
Contents NOT passing with property ? (if any)	N/A
Sale Price of property (e.g. 100,000.00) ?	200,000.00
Deposit Amount in full (e.g. 10,000.00) ?	20,000.00
Description of the property for the Contract.	in the property known as Folio 1234F
Title Deeds to be listed in Documents Schedule in the Contract.	Copy File Plan Copy Mortgage
Is the property serviced with drainage? "Yes" or "No" ?	Yes
Is there a Telephone service (yes or No)?	Yes



Maintain Other Case Details

General | Properties

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

Contents NOT passing with property ? (if any)

Curtains in sitting room

Ok Cancel

Working with Documents already Processed

Marking a Task as Complete

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

1. **Click** on the Task in the Case Diary.

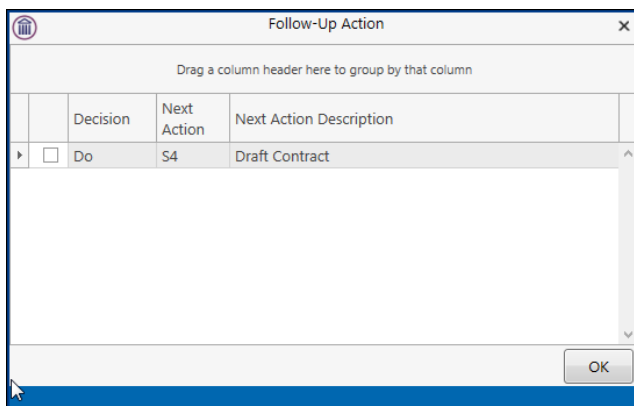
2. Click on **Complete Action**  available on the Home tab of the Ribbon. A tick on a green disc will be shown beside the task/action, indicating that it is complete.

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

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

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

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



The dialog box titled "Follow-Up Action" contains a table with the following structure:

Drag a column header here to group by that column			
	Decision	Next Action	Next Action Description
	☐ Do	S4	Draft Contract

An "OK" button is located at the bottom right of the dialog box.

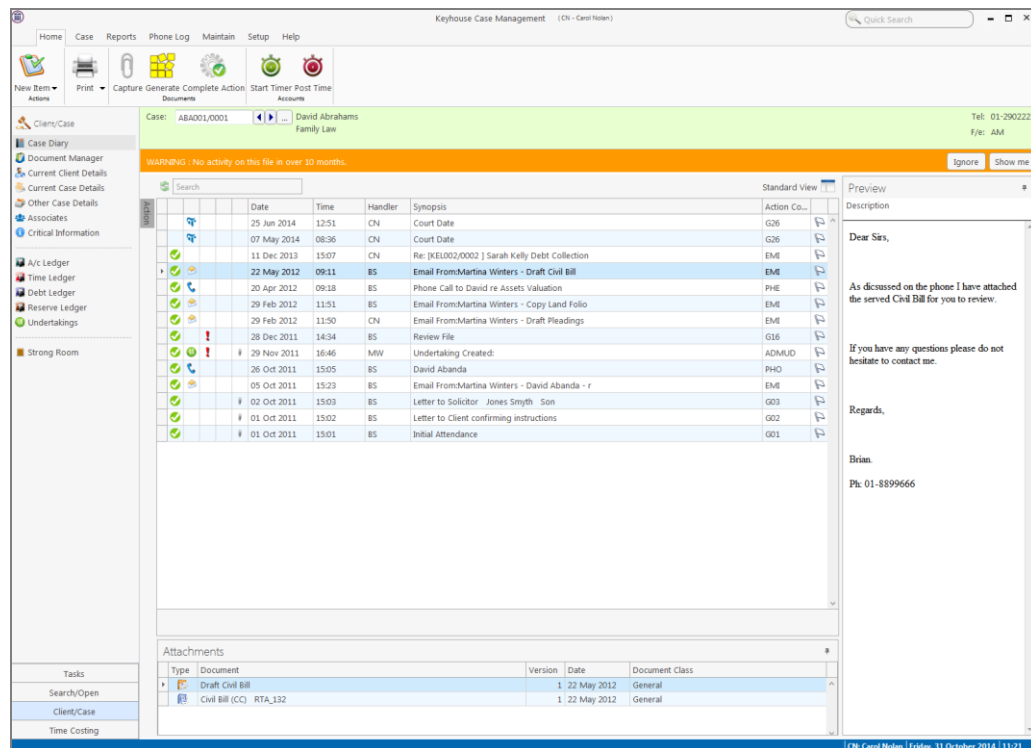
Or

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

 **Note:** The setup of this section is controlled by your administrator contact him/her regarding setup and timelines.

Opening Documents Generated

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

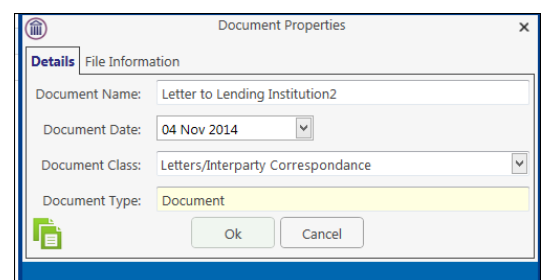
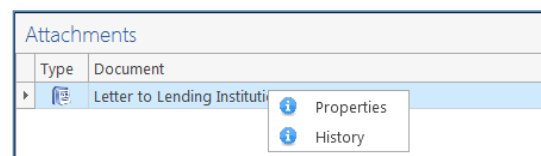


2. **Double Click** on the document in the attachment window. Word will launch and open the document.

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

Changing the Name and Class of a Generated Document

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



Undertakings

Viewing Undertakings

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

Case: ABA001/0003 David Abrahams
Sale of 22 O'Connell Street, Dublin 1

Action	Date	Time	Handler	Synopsis
!	02 Nov 2014	18:13	AM	Undertaking Created:
	02 Nov 2014	17:16	CN	Initial Letter and Section 68
	02 Nov 2014	17:08	CN	Initial Letter and Section 68
	01 Oct 2014	17:08	CN	Instruction Received

3. Any Undertakings in the case will be displayed.

Case: ABA001/0003 David Abrahams
Sale of 22 O'Connell Street, Dublin 1

Date	Type	Who	Value	Details
02 Nov 2014	Financial	ABC Accountants (ABC Accountants)	1,000.00	Pay for copy of files
02 Nov 2014	Financial	Abercorn (Abercorn)	5,000.00	Deposit to be returned

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

Adding and Viewing an Undertaking

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

Comment to Ledger:	Using the tick box provided tick if you want a comment added to the ledger
Date	This is actual date of the undertaking. Click the  button to select a date from the calendar.
Diary Warning Date	This is the date the Undertaking Action will appear on the Fee Earners Task List as a To Do Item. This will default to a system warning date to amend click on the down arrow to view a calendar and select a date.
Type	Check the appropriate button for the type of undertaking i.e. Financial or Documents .
Given or Received	Select whether the undertaking has been given by you or received by you.
Commercial	Select whether the undertaking is commercial or non-commercial
Authorised by FE	Click on the down arrow to select the relevant Fee Earner against the undertaking.
Undertaking to	Click on the down arrow to select the relevant Case to whom the undertaking is been given or received.
Who	This will default to the selected case associate.
Details	Input a description of this undertaking.
Value	Input the amount the undertaking is for.
Status	Click on the down arrow and select the required status.
Dealing Number	Input the dealing number

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

Home Case Reports Phone Log Maintain Setup Help

Print Add Edit Delete Discharge Undertakings

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

Case: ABA001/0003 David Abrahams
Sale of 22 O'Connell Street, Dublin

Search

Date	Type	Who	Value	Details
02 Nov 2014	Financial	ABC Accountants (ABC Accountants)	1,000.00	Pay for copy of files
02 Nov 2014	Financial	Abercorn (Abercorn)	5,000.00	Deposit to be returned

AND

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

All Undertakings can be clearly identified by the Undertaking symbol

Case: FLY001/0001 Jack Flynn
Sale of House at: 4 The Mews, Rathfarnham, Dublin 6

Search

Date	Time	Handler	Synopsis
30 Oct 2015	11:02	CN	Close file
26 Oct 2015	11:02	CN	Remind Purchaser Solicitors to release from Undertaking
30 Jul 2015	09:19	CN	Letter to Auctioneer
27 Jul 2015	14:41	CN	Forward deeds after registration
24 Jul 2015	12:58	CN	Statute of Limitations Date =28 Jul 2017

5. To view the Undertaking details **double click** the task the following Change Action dialogue box will appear.

6. Click **OK** to close.



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

Change Action (3172)

Action: Generate Document, Post Time, Note, High, Assign Action, Generate SDLT, Save, Open Attachment, Complete, Email, Play Dictation, Print, Take Action, Default Actions, Priority, Low, SDLT

General Properties Attachment/Documents Action Assignments Other Notes

Case: FLY001/0001 Sale of House at: 4 The Mews, Rathfarnham, Dublin 6

Action Code: ADMUD Undertaking

Date: 27 Jul 2015 Due Date: 27 Jul 2015

Subject: Forward deeds after registration

Fe/Handler: Carol Nolan

Team: Commercial

Undertaking Created:

Date: 27 Jul 2015

Type: Documents Given

Authorised By: CN Carol Nolan

Undertaking to: FLY001/First Active plc (First Active)

Details: Forward deeds after registration

Who: First Active plc (First Active)

Value: 250000.00

Status: Post Registration

Dealing Number:

OK Cancel

How to Edit an Undertaking

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

How to Discharge an Undertaking

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

Date	Type	Who	Value	Details
30 Oct 2015	Documents	Dublin County Registrar	100.00	Register owner of property
27 Jul 2015	Documents	First Active plc (First Active)	250,000.00	Forward deeds after registration

3. Click on the **Discharge**; the following dialogue box will appear displaying the undertaking.
4. **Input** a description in the discharge description box.
5. Click **OK** you will then return to the undertaking screen where the undertaking will have a discharge date lodged against.

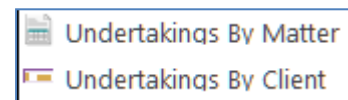
Note It cannot be edited beyond this point.

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



Undertaking Reports

Undertakings by Matter



1. Click on **Print** on the Home tab to bring up a menu with two options:
2. Click on **Undertakings by Matter** the following screen will appear.

Set the Parameters by:

Selecting a date

the current matter number will appear by default; change if required.

Input All, Not Discharged or Discharged.

3. Click on **Run** the following report will appear.

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

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

Matter	Undertaking Date	Undertaking Type	Authority	Discharge Method	Gender	Status	Welfare
FLY001/0001	27/07/2015	Document	CN	Discharge	Male	Not Discharged	250,000.00
Total Count of Undertakings:							1
Financial Value:							250,000.00

How to view Critical Information and Print Reports

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

Case: BLA001/0001 Gordon T. Black
RTA Walkinstown Crossroads, G. Black

Only talk to Gordon Black Senior

☒ Show Alert

Debtors A/c	147.35	3 April 2010 25/10/13
Outlay A/c	3,336.61	24 Month - Over 12
Outlay Budget	0.00	
Current Outstanding Fees	121.78	
Client A/c	0.02	
Client Current	0.02	
Client Deposit	0.00	
Current Locked up value	7,043.13	Percentage of Estimated Fee
Total Work In Progress	3,559.17	
Write off time	0.00	
Fees issued to date	60635.00	
Fees To Date + WIP	64,194.17	
Estimate Fees	0.00	
Draft Invoices	0.00	
Last Bill Date	12 May 2011	
Expected Bill Date		
Possible value to the client	0.00	

Start Date	File Colour
08 May 2010	

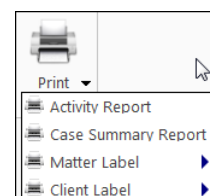
Who	Date	Description
BS	08 Apr 2015	Statute of Limitations Date = 18/04/2015 Changed From 25/03/2015
MW	10 Dec 2013	Undertaking Created: Date: 10/12/2013 Type: Document Given
SK	24 Nov 2011	Attendance

Description	Value	Who	Given/Received
Title deeds	0.00	Allsop & Browne	Given
overdraft	5,000.00	Trustee Saving Bank	Given

Stephen Keogh	5:21		1,273.67
Martina Winters	4:01		804.00
Brian Sweeney	4:26		707.50
	16:30		3,559.17

Document Drafting	4:46		1,190.00
Advice	3:30		875.00
Court Attendance	4:01		804.00
Attendance	1:11		294.17
Letter Drafting	0:10		42.50

3. To **Print** a report click on **Print** on the toolbar the following option will appear.



4. Click on the **Report** required

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

Summary Report Click on Case Summary Report
The current case code will appear **amend** if required.
Then click **Run**.

Print Labels Click on Matter Label or Client label as required

Other Case Diary Functions

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

- Chapter 6 for the Keyhouse Capture
- Chapter 7 for the template Library
- Chapter 8 for the Conflict Search
- Chapter 9 for the Strong Room
- Chapter 10 for Time Recording
- Chapter 11 for Accounts
- Chapter 12 for the Debt Ledger
- Chapter 13 for the Reserve Ledger

Chapter 5: The Task Manager

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

Navigating the Task List

The Task Screen

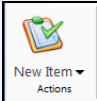
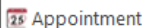
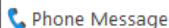
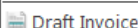
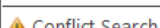
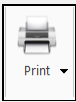
The screenshot displays the Keyhouse Task Manager interface. Callouts identify the following components:

- Toolbar:** Located at the top, containing icons for Home, Case, Reports, Phone Log, and Maintenance, along with buttons for 'New Item', 'Print', 'Capture', 'Generate', 'Complete', and 'Action'.
- Search Box:** A text input field for searching tasks, with a dropdown menu showing 'Carol Nolan' and 'Overdue'.
- Task views:** A sidebar on the left with a list of filters: 'My tasks', 'Team tasks', 'Day's tasks', 'Next week's tasks', 'Next month's tasks', 'Overdue tasks' (selected), 'Outstanding tasks', 'Last week's tasks', 'Last month's tasks', 'All tasks', and 'My Overview'.
- Task list:** The main table displaying task details. The columns are: Date, Time, Case Code, Handler, Team, From, Client/Case/Matter, Action, and Diary Date. The table shows multiple tasks for November 4, 2014, with actions like 'Review File', 'Letter to Solicitor', 'Letter to Lending Institution', 'Letter to Client', and 'Letter to Doctor'.
- Document Preview Pane:** A panel on the right showing a preview of a document titled 'Letter to Lending Institution'. It includes a header with 'OUR REF', 'YOUR REF', and 'DATE', followed by a 'Re:' line with client details and a 'Dear Sir' salutation.

Date	Time	Case Code	Handler	Team	From	Client/Case/Matter	Action	Diary Date
04 Nov 2014	19:31	GLE001/0001	CN	COM	CN	Charlie Gleeson Lease of South West Georges Street	Review File	04 Nov 2...
04 Nov 2014	19:09	GLE001/0001	CN	COM	CN	Charlie Gleeson Lease of South West Georges Street	Letter to Solicitor	04 Nov 2...
04 Nov 2014	19:07	ABA001/0003	CN	COM	CN	David Abrahams Sale of 22 O'Connell Street, Dublin 1	Letter to Lending Institution	04 Nov 2...
04 Nov 2014	18:16	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Review File	04 Nov 2...
04 Nov 2014	18:15	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Review File	04 Nov 2...
04 Nov 2014	17:26	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Lending Institution	04 Nov 2...
04 Nov 2014	17:25	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Instruction Received	04 Nov 2...
04 Nov 2014	17:25	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Lending Institution	04 Nov 2...
04 Nov 2014	17:24	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Client ?	04 Nov 2...
04 Nov 2014	17:24	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Lending Institution	04 Nov 2...
04 Nov 2014	17:19	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Doctor	04 Nov 2...
04 Nov 2014	17:11	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du...	Letter to Doctor	04 Nov 2...
04 Nov 2014	17:03	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to Doctor	04 Nov 2...
04 Nov 2014	17:03	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to Solicitor	04 Nov 2...
04 Nov 2014	16:55	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to Solicitor	04 Nov 2...
04 Nov 2014	16:53	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to John Dunne	04 Nov 2...
04 Nov 2014	16:44	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to Client	04 Nov 2...
04 Nov 2014	16:35	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G. BL...	Letter to Client	04 Nov 2...
03 Nov 2014	16:37	ABA001/0003	CN	COM	CN	David Abrahams Sale of 22 O'Connell Street, Dublin 1	Letter to Barrister	03 Nov 2...
03 Nov 2014	16:23	ABA001/0003	CN	COM	CN	David Abrahams Sale of 22 O'Connell Street, Dublin 1	Letter to Solicitor	03 Nov 2...

Count=60

The Home tab in Task Manager

	New	Click on the New to add any of these tasks.	        
	Printer	Click to print a reports on your task list.	
	Capture	Click on capture to launch the document capture program to import documents or folders of documents or images.	
	Generate	Click to generate a document for a selected action.	
	Complete Action	Click to mark a task as complete.	

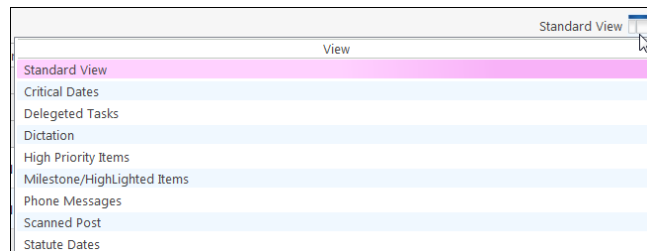
Task Views

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

 My tasks  Team tasks	Click on My tasks to view the current handler's tasks or click on team tasks to view the team tasks
 Day's tasks	Click on this to view today's tasks.
From 08 Nov 2014 To 08 Nov 2014	Select a range of dates.
 Next week's tasks	Click to view next week's tasks.
 Next month's tasks	Click to view next month's tasks
 Overdue tasks	Click to view Overdue tasks
 Outstanding tasks	Click to view outstanding tasks i.e. past, present or future.
 Last week's tasks	Click to view Last Week's outstanding tasks.
 Last month's tasks	Click to view Last Month's outstanding tasks.
 All tasks	All Tasks shows all outstanding tasks
 My Overview	Click to view the overview screen.

Using Different Layouts/Views

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



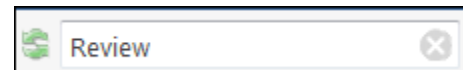
How to Show/Hide the Preview Pane

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

Searching, Sorting, Filtering and Grouping Tasks

How to Search the Task list

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



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

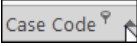
Handler Carol Nolan ☒ Outstanding Only Standard View											
			Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action	Diary Date
			04 Nov 2014	19:31	GLE001/0001	CN	COM	CN	Charlie Gleeson Lease of South West Georges Str...	Review File	04 Nov 2014
			04 Nov 2014	18:16	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D...	Review File	04 Nov 2014
			04 Nov 2014	18:15	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D...	Review File	04 Nov 2014
			28 May 2014	08:36	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G...	Review all contracts	28 May 2014
			07 May 2014	11:49	KEL002/0001	CN	COM	CN	Sarah Kelly Purchase of Property	Review File	07 May 2014
			07 May 2014	11:35	OCO001/0001	CN	COM	CN	John O'Connor John O'Connor V John Smith	File Review	07 May 2014
			26 Dec 2013	12:04	KEL002/0001	CN	COM	CN	Sarah Kelly Purchase of Property	Review File	26 Dec 2013
			19 Dec 2013	14:52					Melinda FitzGerald	Review	19 Dec 2013

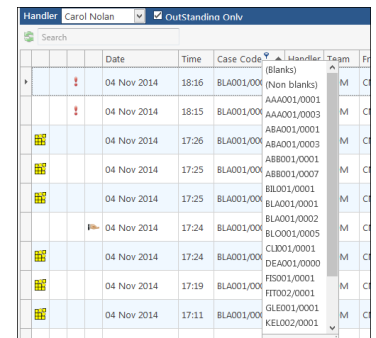
3. To clear the search results click **Clear**. 

How to Sort Column Headings in the Task Manager

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

How to Filter the Task Manager

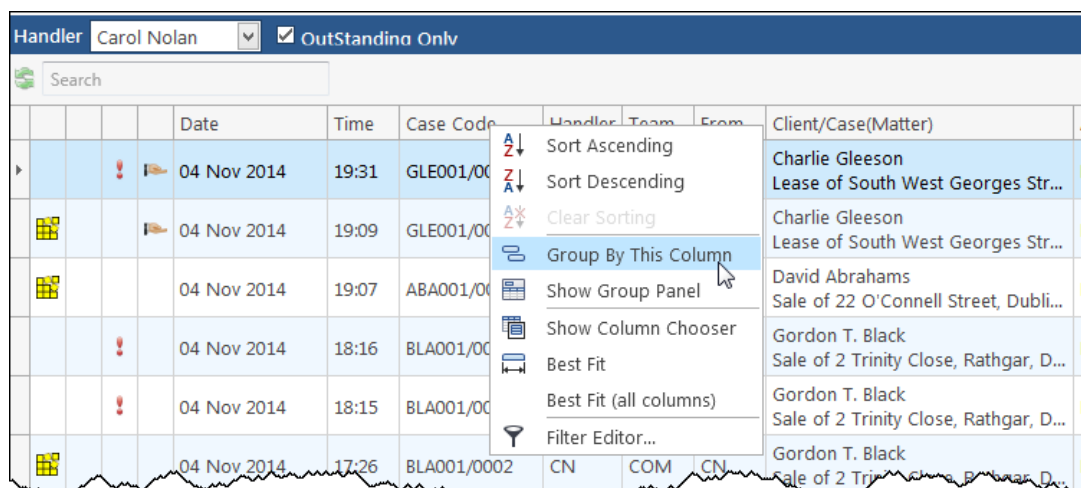
1. Move your mouse to the required column heading.
2. To view a list of filter categories  click on the pin and select the required category. See the following example



Handler	Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)
	04 Nov 2014	18:16	BLA001/000	(Non blanks)			
	04 Nov 2014	18:15	BLA001/000	AAA001/0001	M		
	04 Nov 2014	17:26	BLA001/000	AAA001/0003	M		
	04 Nov 2014	17:25	BLA001/000	ABA001/0001	M		
	04 Nov 2014	17:25	BLA001/000	ABA001/0003	M		
	04 Nov 2014	17:25	BLA001/000	AB8001/0001	M		
	04 Nov 2014	17:25	BLA001/000	AB8001/0007	M		
	04 Nov 2014	17:24	BLA001/000	BL001/0001	M		
	04 Nov 2014	17:24	BLA001/000	BLA001/0002	M		
	04 Nov 2014	17:24	BLA001/000	BL0001/0005	M		
	04 Nov 2014	17:19	BLA001/000	CL001/0001	M		
	04 Nov 2014	17:11	BLA001/000	DEA001/0000	M		
	04 Nov 2014	17:11	BLA001/000	FT002/0001	M		
	04 Nov 2014	17:11	BLA001/000	GLE001/0001	M		
	04 Nov 2014	17:11	BLA001/000	KE002/0001	M		

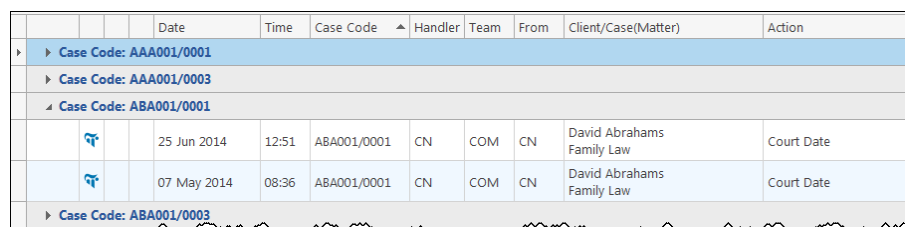
How to Group by a column heading in the Task Manager

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



Handler	Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)
	04 Nov 2014	19:31	GLE001/000				Charlie Gleeson
	04 Nov 2014	19:09	GLE001/000				Lease of South West Georges Str...
	04 Nov 2014	19:07	ABA001/000				David Abrahams
	04 Nov 2014	18:16	BLA001/000				Sale of 22 O'Connell Street, Dubli...
	04 Nov 2014	18:15	BLA001/000				Gordon T. Black
	04 Nov 2014	17:26	BLA001/0002	CN	COM	CN	Sale of 2 Trinity Close, Rathgar, D...

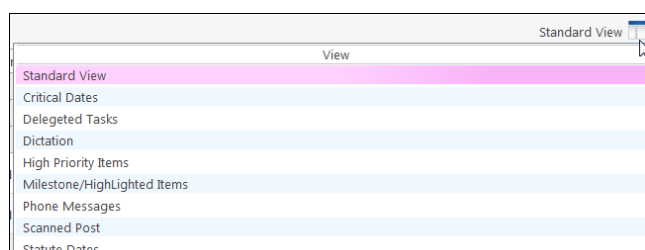
2. Click on **Group By This column**. See the following example of a grouping by fee earner



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

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

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



View
Standard View
Critical Dates
Delegated Tasks
Dictation
High Priority Items
Milestone/HighLighted Items
Phone Messages
Scanned Post
Statute Dates

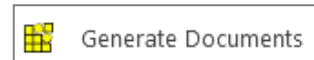
Working with Tasks

Accessing a Case Diary from the Task List

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

How to Generate Documents

1. **Right click** on the task you want to generate, and select **Generate Documents** from the pop-up menu.
2. The documents will be generated in the normal way. For further information see the section on generating documents in Chapter 4.



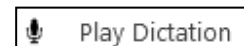
How to View the Documents of a Task

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



How to play a dictation

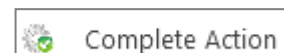
Right click on the task with the dictation you want to hear and select Play Dictation from the pop-up menu.



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

How to Mark a Single task as Complete

Right click on the task you want to mark as complete and select Complete Action from the pop-up menu



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

How to Tag Several Tasks and Mark as Complete

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

How to Alarm an Action/Case

1. **Right click** on the task you want to alarm and select **Alarm Action** from the pop-up menu. The following screen will appear.



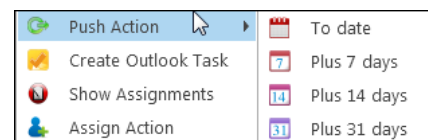
- Using the drop down arrow set a **Date**
- Input a Time for the alarm.
- Assign it to yourself or all delegates.
- Click **OK**.

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



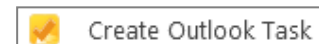
How to Push a Task

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



How to Create a Outlook Task

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



How to Tag All Tasks

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

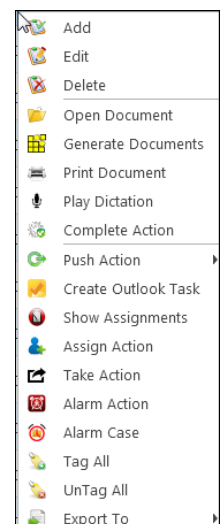
- Right click** in the task list, to see the pop-up menu.
- Click on **Tag All**.



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

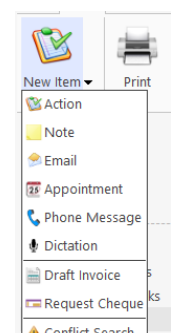


- Right click** again in the task list to bring up the menu again.
- Click on the required function e.g. **Complete Action**.



How to Add a New Item

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



The screenshot shows the 'Add Action' dialog box. The 'General' tab is selected, displaying the following fields:

- Case:** FLY001/0001 (with a selection button)
- Action Code:** ADMNT (with a selection button)
- Date:** 27 Jul 2015 (with a calendar icon)
- Due Date:** 27 Jul 2015 (with a calendar icon)
- Subject:** (empty text field)
- Fe/Handler:** Carol Nolan (dropdown menu)
- Team:** Commercial (dropdown menu)
- Description:** (large empty text area)

Buttons for 'Ok' and 'Cancel' are located at the bottom right of the dialog.

3. **Enter** the following details:

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

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

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

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

Subject Input a subject

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

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

Description Input a description in the box provided.

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

How to Edit a Task

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

Letter to Solicitor (1964)

Action

Generate Document Post Time Note Assign Action Save

Open Attachment Complete Email

Play Dictation Print Take Action

Default Actions

General Properties Attachment/Documents Action Assignments Other Notes

Case GLE001/0001 Lease of South West Georges Street

Action Code G03 Letter to Solicitor ?

Date 04 Nov 2014 Due Date 14 Nov 2014

Subject Letter to Solicitor

General Email Appointment

F/e Handler Carol Nolan

Team Commercial

Letter to Solicitor

Ok Cancel

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

How to Delete Tasks

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

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

Assigning Tasks

How to Recognise Assigned Tasks

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

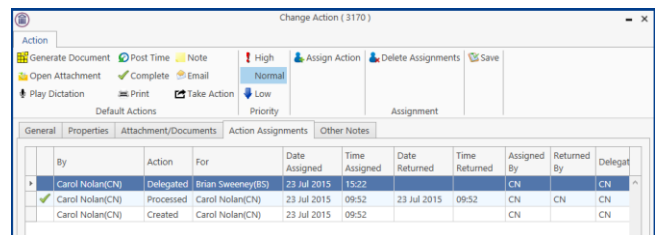


	Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action
	04 Nov 2014	19:31	GLE001/0001	CN	COM	CN	Charlie Gleeson Lease of South West Georges Str...	Review File

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

How to View the Assignment History of a Task

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



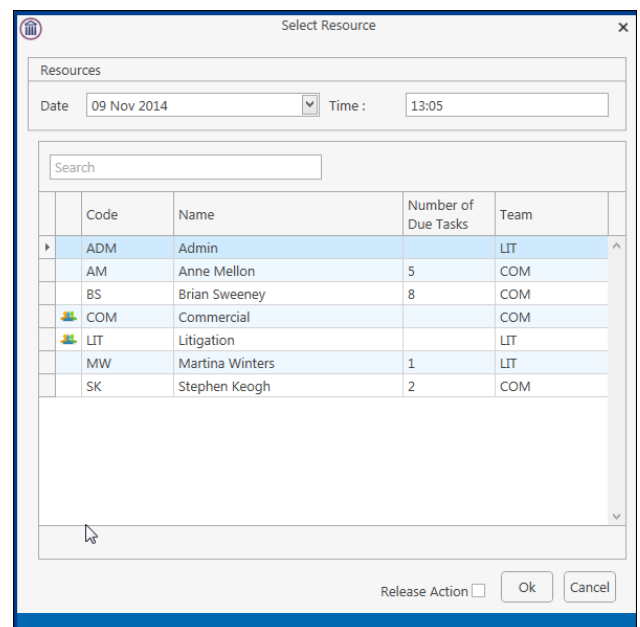
By	Action	For	Date Assigned	Time Assigned	Date Returned	Time Returned	Assigned By	Returned By	Delegat
Carol Nolan(CN)	Delegated	Brian Sweeney(BS)	23 Jul 2015	15:22			CN		CN
Carol Nolan(CN)	Processed	Carol Nolan(CN)	23 Jul 2015	09:52	23 Jul 2015	09:52	CN	CN	CN
Carol Nolan(CN)	Created	Carol Nolan(CN)	23 Jul 2015	09:52			CN		CN

How to Assign a Task to Another Handler

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

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

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



Select Resource

Resources

Date: 09 Nov 2014 Time: 13:05

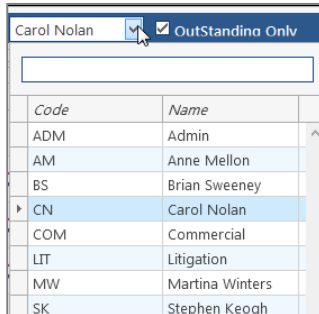
Search

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

Release Action ☐ Ok Cancel

How to take a Task

1. Go to another users Task list by clicking the down arrow next to your user name at the top of the Task List and selecting the other user.
2. **Right click** on a task in the other user's list and select **Take Action** from the pop-up menu. The task will be removed from this user's task list.

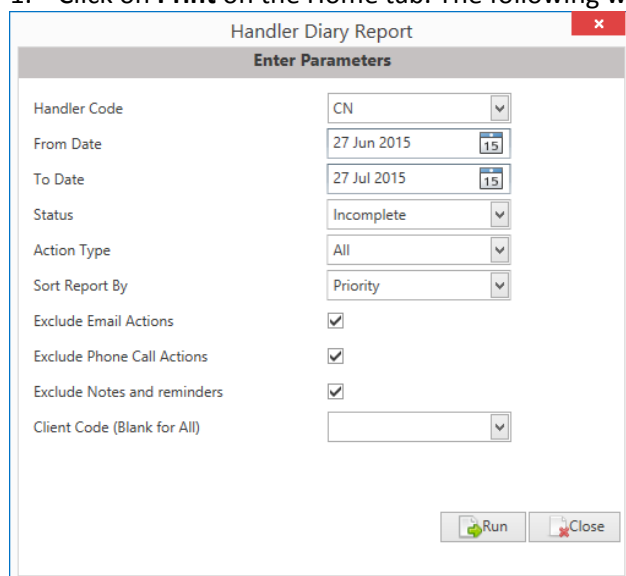
 Take Action


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

Task List Options

Print your task list

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



Include Closed

Check to include closed items

Select the handler

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

Select the status

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

From Date

Using the calendar to select the start date

To Date

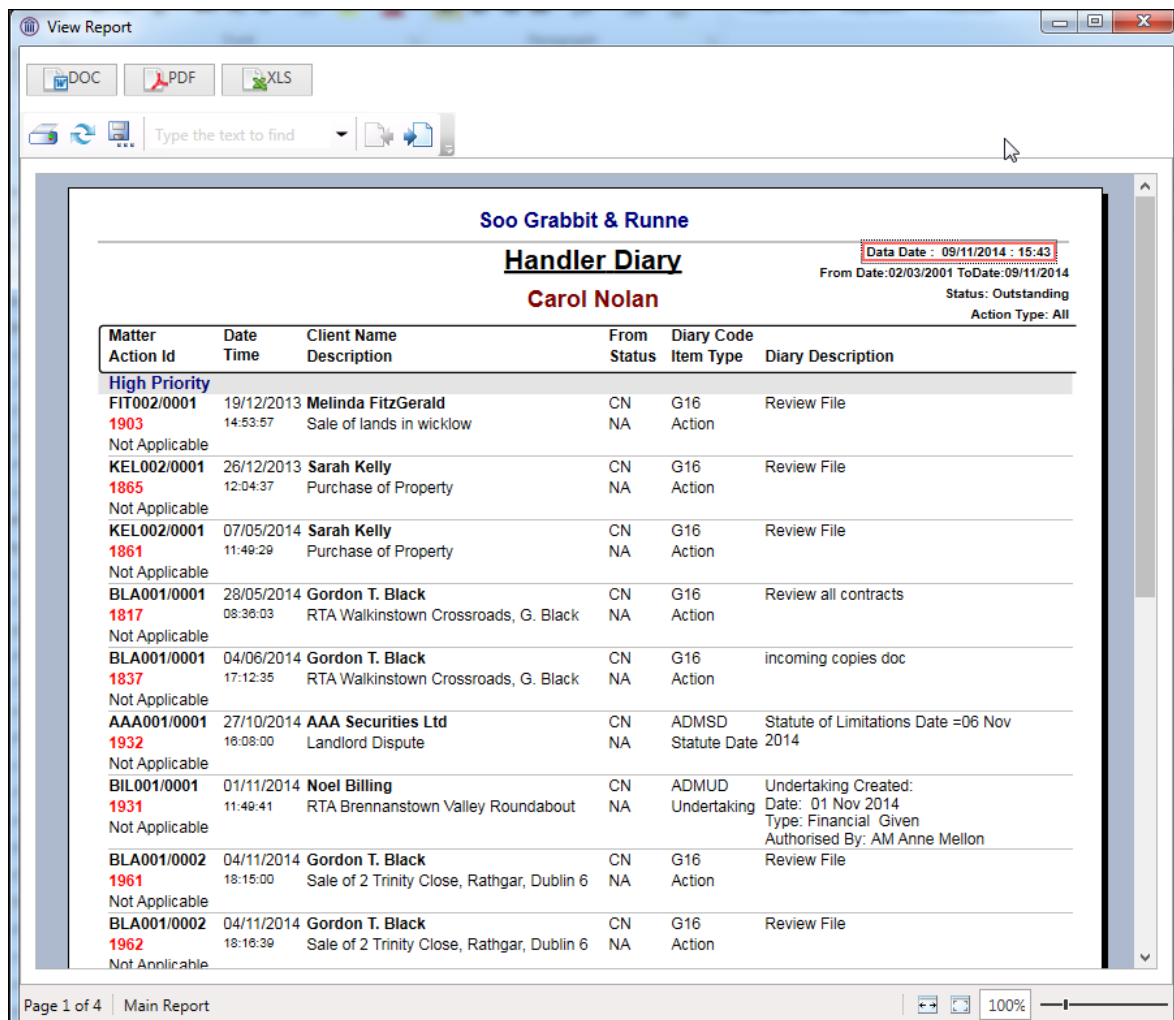
Using the calendar to select the end date

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

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



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



View Report

DOC PDF XLS

Type the text to find

Soo Grabbit & Runne

Handler Diary

Carol Nolan

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

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

Page 1 of 4 | Main Report

100%



Word;



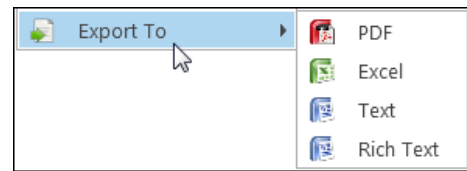
Adobe; or



Excel.

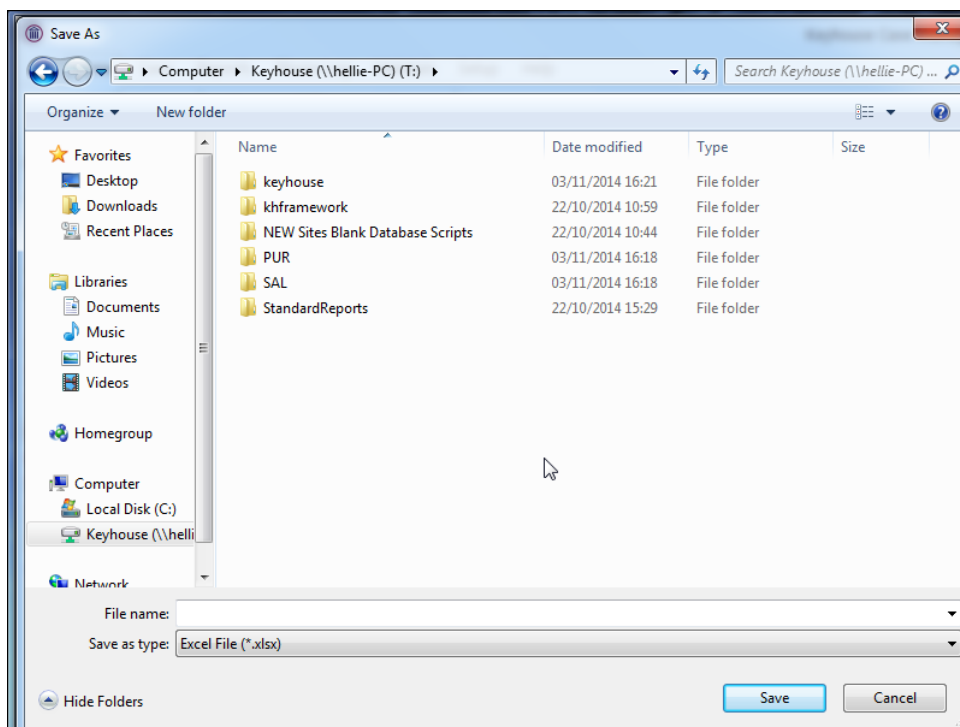
How to Export a copy of your task list

1. **Right click** in your task list and select **Export To** from the pop-up menu.
2. Select the desired option:



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

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

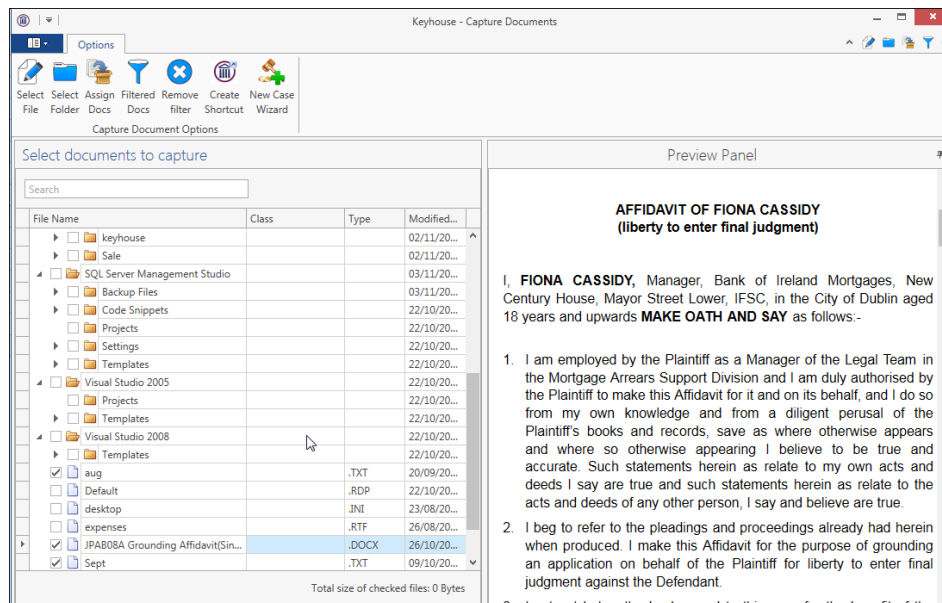


4. Click **Save**.
5. Open the file via **Windows Explorer** or via the open tool in the program chosen.

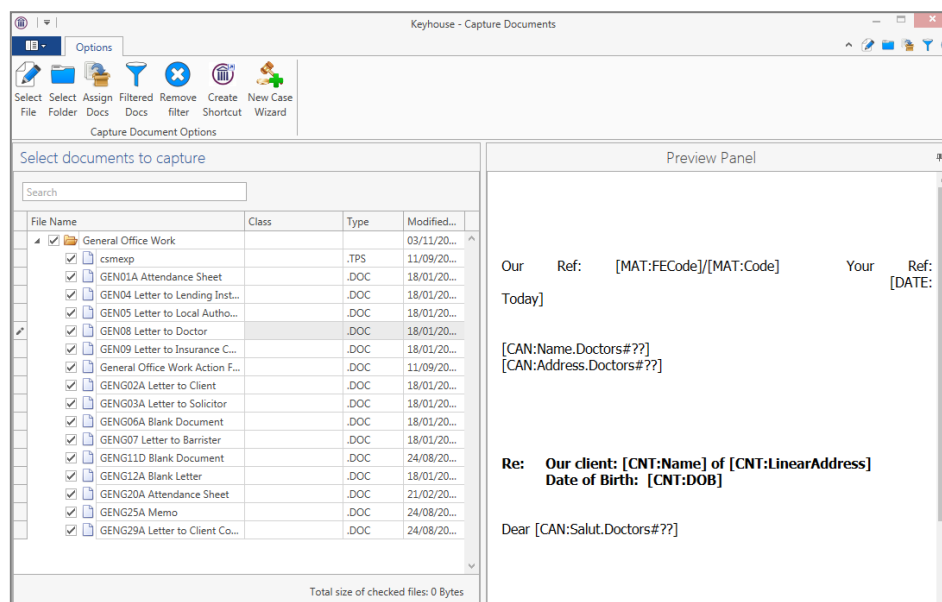
Chapter 6: Keyhouse Capture

How to Capture a Folder

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



3. Browse and locate the folder.
4. Select the folder to be imported and click OK.
5. The following screen will appear listing the folder contents.



**Tip:****To filter a column heading:**

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

**Tip:**

To exclude a file remove the tick.

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

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

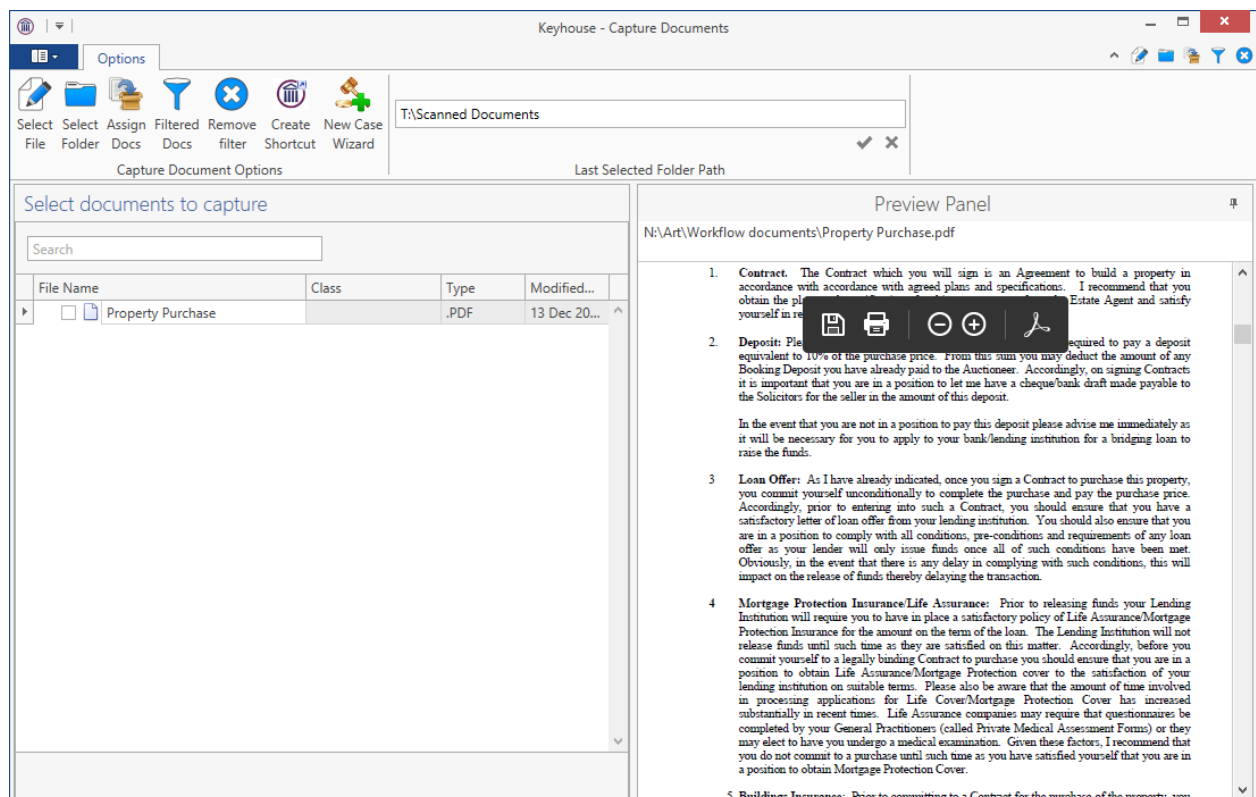
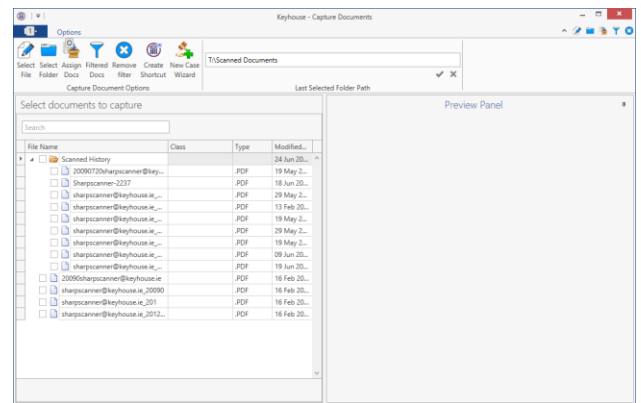
- | | |
|------------------|--|
| Case | The Case will default to the current case. To select a different case, click the browse button; this will bring up a matter list. Select the required case. |
| Handler | The Handler will default to the current handler; select an alternative from the drop-down list, if required. |
| Action | Click the browse button for a list of incoming actions will appear. Select the required action. |
| Description | Input a description in the Description box; if you leave this blank the document name will become the description. |
| Capture Settings | Check the boxes as appropriate to: <ul style="list-style-type: none"> ● delete the Captured documents from original location; ● import documents to a single action (the alternative is that each document will get its individual action in the case diary); ● mark as complete the action into which the document is to be captured; ● mark the document as having been generated. |

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

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

How to Capture a File

1. Click **Capture** on the Home tab in either the Case Diary or Task List. The following screen will appear. 
2. Click **Select File**. 
3. A Windows **Open** dialogue box will appear. Browse and locate the file that is to be captured.
4. Click on the file and click on the Open button. The chosen document will be listed on the left-hand side of the **Capture Documents** window.
5. Tag the document to be captured. There will be a Preview of the document in the Preview Panel, on the right of the window.
6. If the document is to be captured into a new case use the **New Case Wizard** (on the right of the Options tab) to set up the case first. For further information on how to create a new case see Chapter 3.



7. To assign the captured document to a Case, Handler and Action, click **Assign Docs**. The following window will appear.

Assign checked documents to Case/Matter

Case/Matter: BLA001/0002

Handler: Admin

Action Code:

Document Class: Please select a document class

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

Diary Description:

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

Capture settings:

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

Save Settings Ok Cancel

Provide the following information:

- | | |
|------------------|---|
| Case | The Case will default to the current case. To select a different case, click  the browse button; this will bring up a matter list. Select the required case. |
| Handler | The Handler will default to the current handler; select an alternative from the drop-down list, if required. |
| Action | Click the browse button for a list of incoming actions will appear. Select the required action. |
| Description | Input a description in the Description box; if you leave this blank the document name will become the description. |
| Capture Settings | Check the boxes as appropriate to: <ul style="list-style-type: none">● delete the Captured documents from original location;● import documents to a single action (the alternative is that each document will get its individual action in the case diary);● mark as complete the action into which the document is to be captured;● mark the document as having been generated. |



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

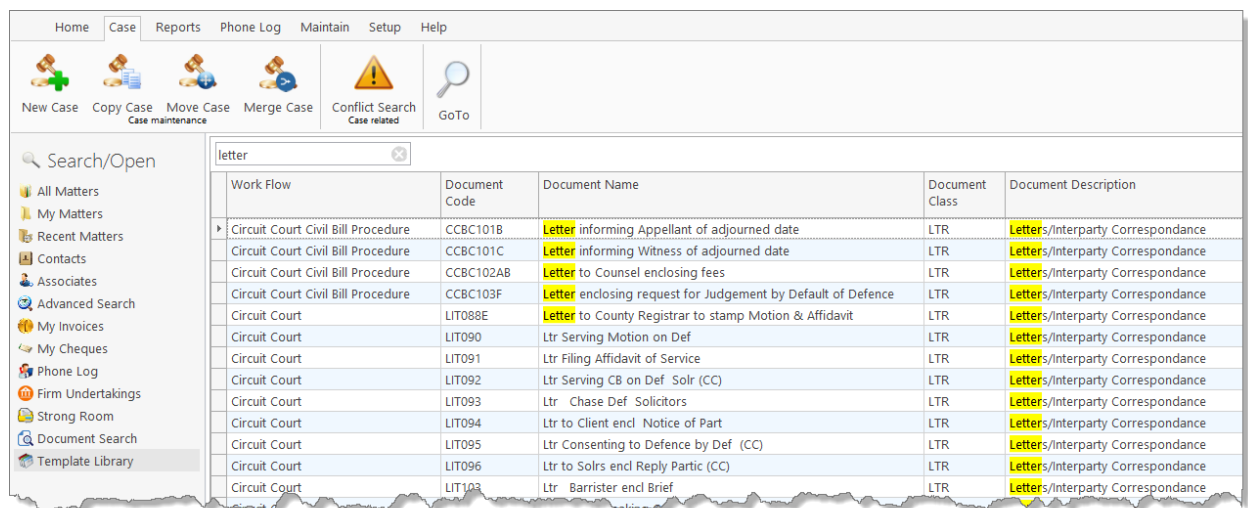
8. When finished click **OK**.
9. The files will appear in the case diary as a single action or multiple actions, depending on the options chosen.

Chapter 7: The Template Library

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

How to Search for precedent documents

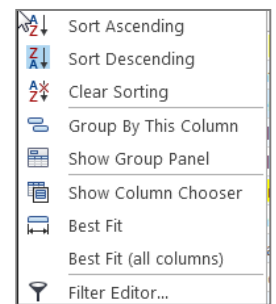
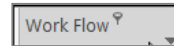
1. Click on Search/Open.
2. Click on Template Library the following screen will appear.



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

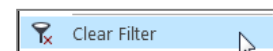
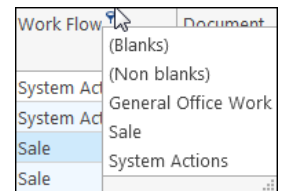
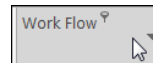
How to sort Column Headings in the Template Library

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



How to apply a filter

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



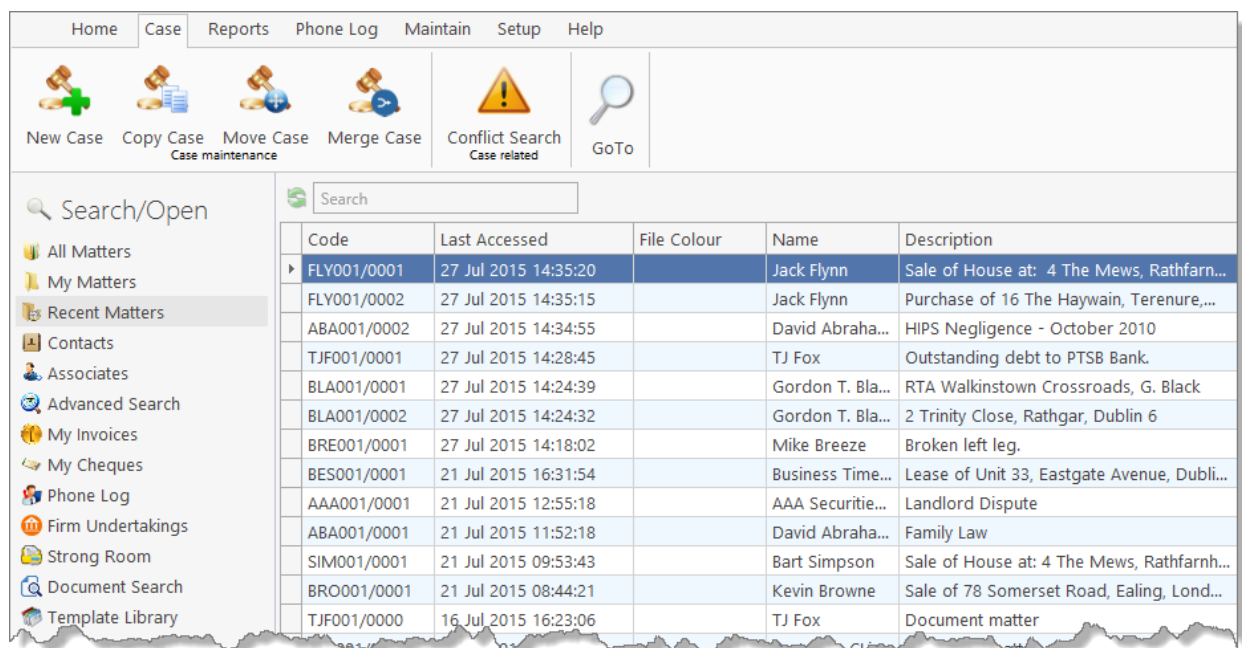
Chapter 8: Conflict Search

What is a Conflict Search?

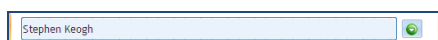
A conflict search is a search designed to alert the user to any potential conflicts of interest; for example if the firm is being asked to act for somebody who is/was an opposing party in previous or continuing proceedings. The fields searched are Client Name, Spousal Name, Case Associate Name, all PPS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

How to do a Conflict Search

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

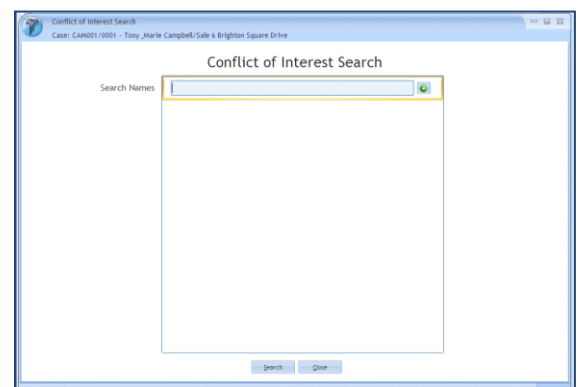


2. Click on **Conflict Search** icon on the Case tab.
3. A Conflict of Interest Search window will appear.
4. The types of information you can search for are the Name, PPS number, telephone number or address.
 - a. Click in the search box, **input** the first search criteria e.g. Stephen Keogh

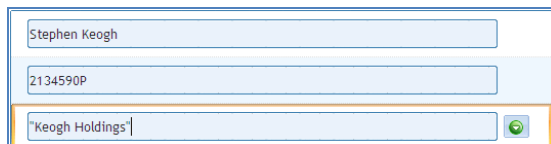


This will search for Stephen **or** Keogh anywhere.

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

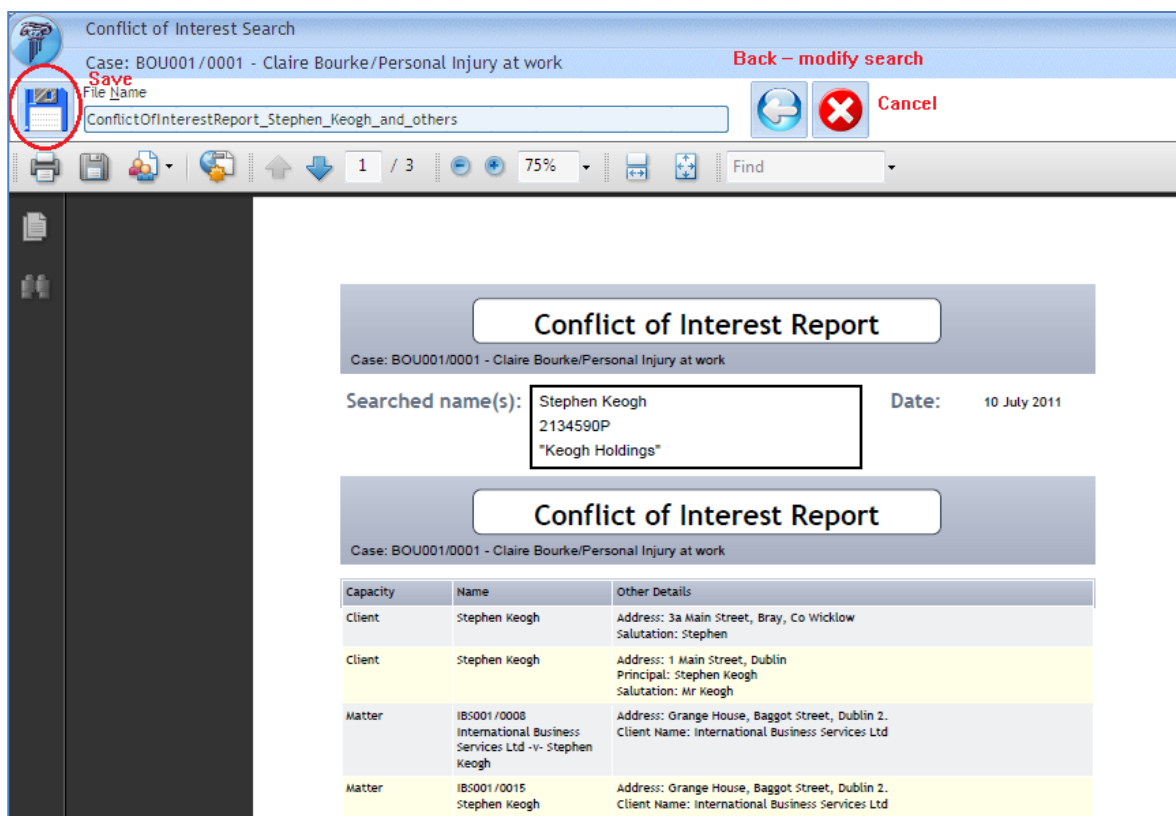


- b. To add a second criteria click on the **down arrow**  Input the second search criteria. Repeat this process for a 3rd, 4th etc. See the following example



This will search for Stephen or Keogh anywhere **and**
2134590P anywhere **and**
The exact phrase "Keogh Holdings" anywhere.

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



Conflict of Interest Report
Case: BOU001/0001 - Claire Bourke/Personal Injury at work

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

Date: 10 July 2011

Conflict of Interest Report
Case: BOU001/0001 - Claire Bourke/Personal Injury at work

Capacity	Name	Other Details
Client	Stephen Keogh	Address: 3a Main Street, Bray, Co Wicklow Salutation: Stephen
Client	Stephen Keogh	Address: 1 Main Street, Dublin Principal: Stephen Keogh Salutation: Mr Keogh
Matter	IB5001/0008 International Business Services Ltd -v- Stephen Keogh	Address: Grange House, Baggot Street, Dublin 2. Client Name: International Business Services Ltd
Matter	IB5001/0015 Stephen Keogh	Address: Grange House, Baggot Street, Dublin 2. Client Name: International Business Services Ltd

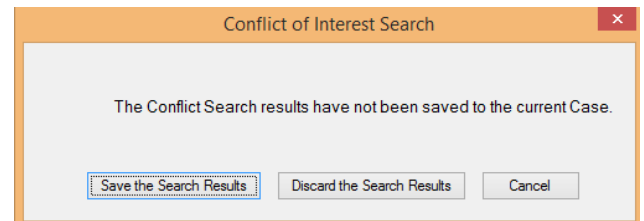
See the following example.

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

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

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

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



Chapter 9: The Strong Room

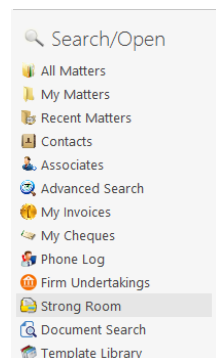
What is the Strong Room used for?

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

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

How to Search for an Item

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



Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date
0000123131	TJ001/0001	DEE	TJ Fox/Outstanding debt to PT58 Bank.	I	O	
DEE	TAR001/0001	DEE	George Tarrant/Deeds for Commercial Premises	I	O	30 Jun 2014
0000123128	RVA002/0001	WIL	Margaret Ryan/Will which included additions for beneficiaries	I		18 Jun 2014
test	OWE001/0001	DEE	Peter Owen/Test Deeds for Section 23 Property	I	O	30 Jun 2014
FLY001/101	FLY001/0001	DEE	Jack Flynn/Deeds for house at 4 The Mews, Rathfarnham.	I	O	
FLY001/100	FLY001/0001	COM	Jack Flynn/Company Seal for Flynn & Co	I	O	31 Dec 2015
0000123126	FEN001/0001	WIL	Richard Fennel/Will	I		18 Jun 2014
LEA1811	EVE001/0003	LEA	Ever Green Insurance Corporation/Leasehold Agreement for Turf Rights	I	O	18 Jun 2014
D1234	CUL001/0001	DEE	Ann Marie Cullen/Deeds for 101 Dun Emer Drive, Dublin 6	I		30 Aug 2014
CDA1111	ABB001/0004	DEE	George J Abbott/Title Deeds - Code CDA 1111	I	O	08 Aug 2014
ABB0010001	ABB001/0001	DEE	George J Abbott/Title Deeds for second property	I	O	18 Jun 2014

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

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

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



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

How to Add a File/Item to the Strong Room

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

Fields marked with an asterisk are required.

Item Type	Select the Item Type from the drop-down list.
Item Code	Input an item Code.
Client Code	See also Matter Code below.
Matter Code	If the code of the current matter is not displayed, or you wish to select a different matter, use the browse button to browse the matter list.
Description	Input a description of the item.
Location	Select a storage location from the drop-down list.
Box No	Likewise, select a Box number from the drop-down list.
Search Code	Input a search code
Fee Earning	Use the drop-down list to select the Fee Earning with responsibility for the item.
Entry Date	The date on which the item was entered on the system: normally today's date.
Destroy Date	The date, if any, on which the item is to be destroyed.
Open/Closed	This will default to open.

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

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

How to Withdraw an Item

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

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

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

Provide the following information:

For Who

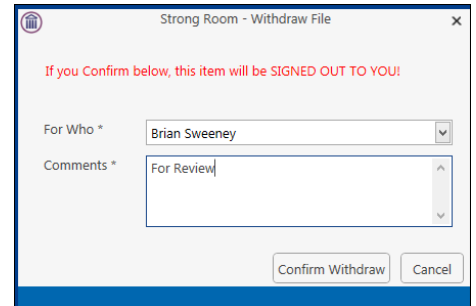
Select the person to whom the item is checked out from the drop-down list.

Comment

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

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

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



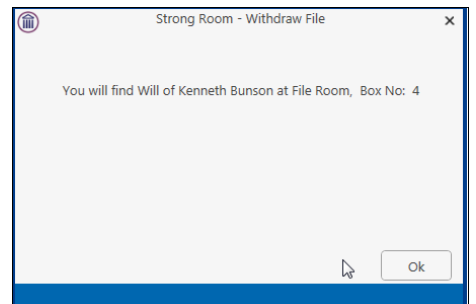
Strong Room - Withdraw File

If you Confirm below, this item will be SIGNED OUT TO YOU!

For Who * Brian Sweeney

Comments * For Review

Confirm Withdraw Cancel



Strong Room - Withdraw File

You will find Will of Kenneth Bunson at File Room, Box No: 4

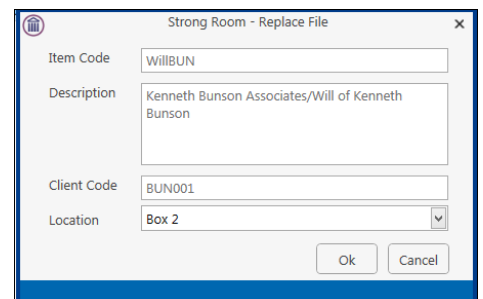
Ok

How to Replace/Return an Item

1. Open the Strong Room screen, search for and select the item you want to replace.
2. Click on the **Replace File** icon on the Home tab.

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

3. The following Replace File dialogue box will appear.
4. Select the physical location, e.g. Box 2, to which the item is being returned.
5. Click **OK**. You will see a message asking you to place the item in the selected location.
6. Click **OK**.



Strong Room - Replace File

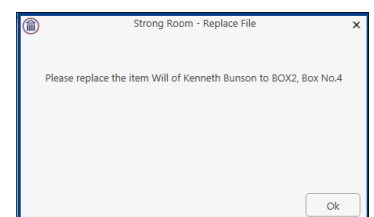
Item Code WillBUN

Description Kenneth Bunson Associates/Will of Kenneth Bunson

Client Code BUN001

Location Box 2

Ok Cancel



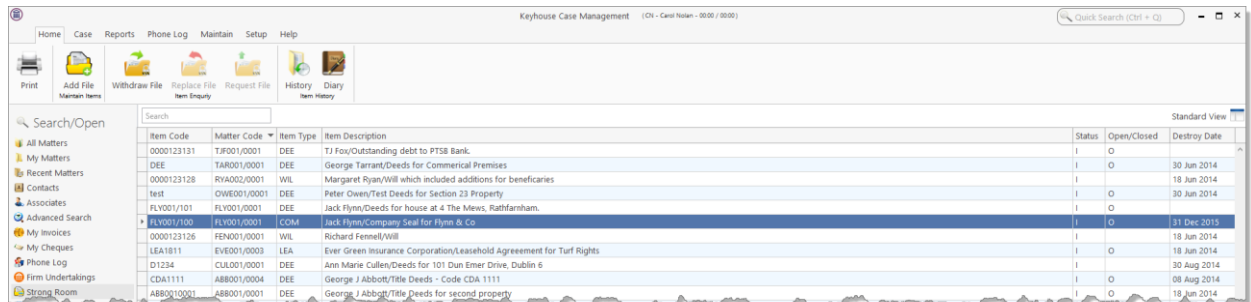
Strong Room - Replace File

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

Ok

How to view the History on a file/item

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



3. **Search** for the item required and select it.
4. Click on the **History Tool** on the Home tab. The following screen will appear showing the history of the item.



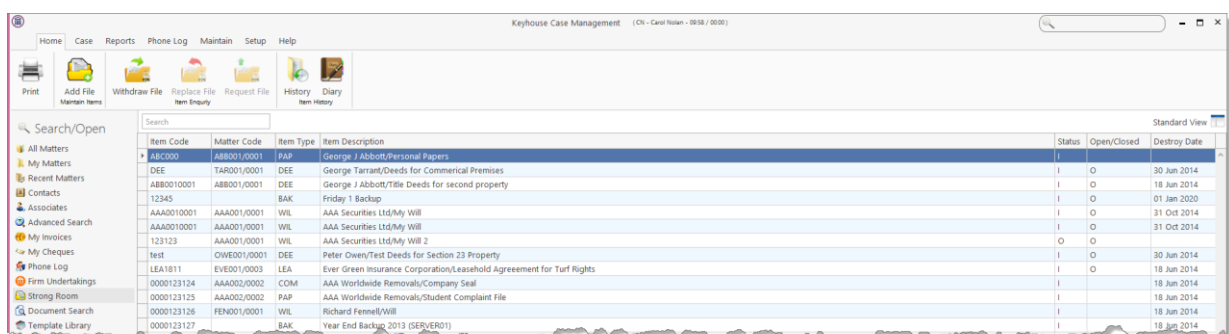
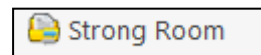
Item History						
	Who	ForWho	Out Date	Out Time	In Date	In Time
	keyhouse	BS	27 Aug 2011	15:21:21	27 Aug 2011	15:21:37
	keyhouse	BS	27 Aug 2011	15:22:17	27 Aug 2011	15:22:29
	MW	CN	11 Nov 2014	19:03:40		

5. Click Cancel to exit this screen.

Working with Documents Only

Add a file without using a Case

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



3. A list of all documents held not related to a specific case/client will be listed.
4. Complete the form as detailed in Add a file to a Case p. **Error! Bookmark not defined.** However, you will not be able to add a Client/Matter details so it is important that a detailed description is made to ensure the documents can be found at a future date.

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

Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date
0000123124	AAA002/0002	COM	AAA Worldwide Removals/Company Seal	I		18 Jun 2014
0000123125	AAA002/0002	PAP	AAA Worldwide Removals/Student Complaint File	I		18 Jun 2014
0000123126	FEN001/0001	WIL	Richard Fennell/Will	I		18 Jun 2014
0000123127		BAK	Year End Backup 2013 (SERVER01)	I		18 Jun 2014
0000123128	RYA002/0001	WIL	Margaret Ryan/Will which included additions for beneficiaries	I		18 Jun 2014
0000123129	AAA001/0001	COM	AAA Securities Ltd/Company Seal	I		19 Jun 2014
0000123130		BAK	Year end backup 2011	I		19 Jun 2014
0000123131	TJF001/0001	DEE	TJ Fox/Outstanding debt to PTSB Bank.	I	O	
0000123133	FLY001/0002	DEE	Jack Flynn/Purchase of 16 The Haywain, Terenure, Dublin 6	I	O	
0000123134		DEE	Tom Jones - Deeds for Property at 18 Rose Lawn, Blanchardstown, Dublin.	I	O	
123123	AAA001/0001	WIL	AAA Securities Ltd/My Will 2	I	O	
12345		BAK	Friday 1 Backup	I	O	01 Jan 2020
AAA001/0001	AAA001/0001	WIL	AAA Securities Ltd/My Will	I	O	31 Oct 2014

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

 **Note:** The process for Withdrawing (p. 78), Replacing (p. 78), and Viewing the History of a document (p. **Error! Bookmark not defined.**) is the same as the process already detailed.

Chapter 10: Time Recording

Time Recording in the Case Diary

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

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



The Timer



Manual time slips

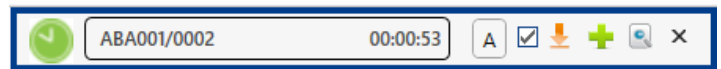
Both tools can be found on the Home tab.

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

How to Record Time Using the Timer

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

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



2. Click **Start Timer** on the Home tab. A timer will appear displaying the current case reference.
3. The clock will automatically start recording. By having the box ticked the clock will follow you as you move from case to case.
4. To pause the timer click on the **clock** at the left of the timer. The clock will stop and an orange symbol will appear next to it.
5. To **resume** recording, click on the **clock** the clock will continue recording.
6. To move to another case in the case diary, search and open the case in the normal way. The timer will automatically pause the current time recording and create a new time recording for the new case and start the clock.



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

FLY001/0002		00:04:08					
Matter Code		Time	Client Name	Matter Details	Comment	Date	
TJF001/0001	...	00:30	TJ Fox	TJ Fox Outstanding debt...	Dictation	27 Ju...	^
TJF001/0001	...	02:00	TJ Fox	TJ Fox Outstanding debt...	General Advi...	27 Ju...	
ABA001/0002	...	00:03	David Abr...	David Abrahams HIPS N...		04 A...	
FLY001/0002	...	00:04	Jack Flynn	Jack Flynn Purchase of 1...		04 A...	

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

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

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

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

FLY001/0002		00:04:08					
Matter Code		Time	Client Name	Matter Details	Comment	Date	
TJF001/0001	...	00:30	TJ Fox	TJ Fox Outstanding debt...	Dictation	27 Ju...	^
TJF001/0001	...	02:00	TJ Fox	TJ Fox Outstanding debt...	General Advi...	27 Ju...	
ABA001/0002	...	00:03	David Abr...	David Abrahams HIPS N...		04 A...	
FLY001/0002	...	00:04	Jack Flynn	Jack Flynn Purchase of 1...		04 A...	

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

How to Post Time from the Timer

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

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

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

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

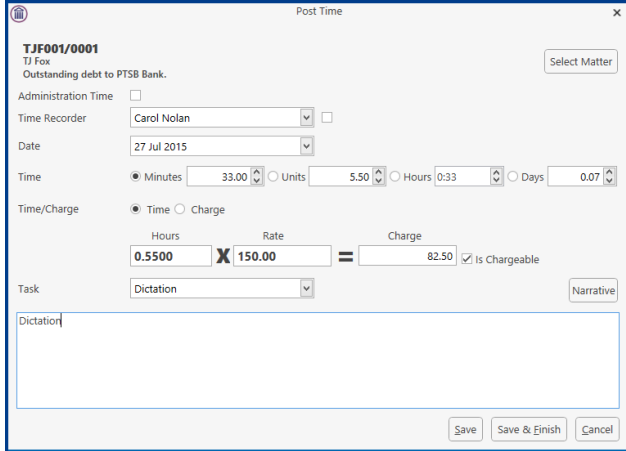
Date: By default, the date the time was recorded will be shown. **Change** if required.

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

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

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

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



The 'Post Time' dialog box is shown. It contains the following fields and controls:

- Matter:** TJF001/0001 (with a 'Select Matter' button)
- Client Name:** TJ Fox
- Description:** Outstanding debt to PTSB Bank.
- Administration Time:** ☐
- Time Recorder:** Carol Nolan (dropdown menu)
- Date:** 27 Jul 2015 (dropdown menu)
- Time:** ☒ Minutes 33.00 ☐ Units 5.50 ☐ Hours 0:33 ☐ Days 0.07
- Time/Charge:** ☒ Time ☐ Charge
- Hours:** 0.5500
- Rate:** 150.00
- Charge:** 82.50
- Is Chargeable:** ☒
- Task:** Dictation (dropdown menu)
- Narrative:** (text area)
- Buttons:** Save, Save & Finish, Cancel

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

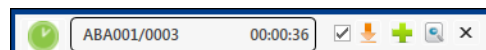
Comment Input a narrative to describe the time entry

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

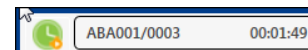
 **Note:** All entries in the Timer are automatically displayed in the Daybook ready for posting.

How to Record and Post Admin Time Using the Timer

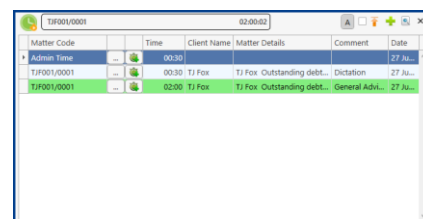
1. **Open** a Case in the Case Diary



2. Click **Start Timer** on the Home tab. The following timer will appear displaying the current case reference.



3. The clock will automatically start recording.
4. To pause recording click on the clock. By putting a tick in the box, the clock will follow you from case to case, starting a new clock on each case.



5. Expand the timer by clicking on **Maximise**.



6. Select the required timer.

5. **Double click** the entry to amend, the following screen will appear.

TJF001/0001
TJ Fox
Outstanding debt to PTSB Bank.

Administration Time ☐

Time Recorder: Carol Nolan

Date: 27 Jul 2015

Time: ☐ Minutes 33.00 ☐ Units 5.50 ☐ Hours 0:33 ☐ Days 0:07

Time/Charge: ☐ Time ☐ Charge

Hours: 0.5500 Rate: 150.00 Charge: 82.50 ☒ is Chargeable

Task: Dictation

Narrative:

Buttons: Save, Save & Finish, Cancel

TJF001/0001
TJ Fox
Outstanding debt to PTSB Bank.

Administration Time ☒

Non Chargeable Code: Practice Development

Time Recorder: Carol Nolan

Date: 23 Oct 2014

Time: ☐ Minutes 35.00 ☐ Units 5.83 ☐ Hours 0:58 ☐ Days 0:08

Training time:

Buttons: Save, Save and Post, Cancel

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

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

7. **Save** the changes.

8. The timer will automatically **restart**.

9. To amend, double click the entry in the Timer and amend the following details as required.

Date Today's date will be shown by default; amend if required.

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

Non- Chargeable Code Select from the drop-down list to change the non-chargeable code.

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

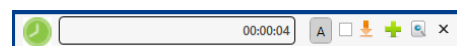
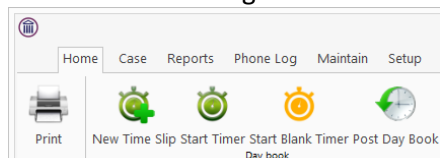
10. Click on **Save and Finish**. This time entry is then transferred to the daybook ready for posting to time ledger.

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

How to create an Empty Timer

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

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

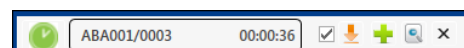


2. To pause the timer click on the clock.

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



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



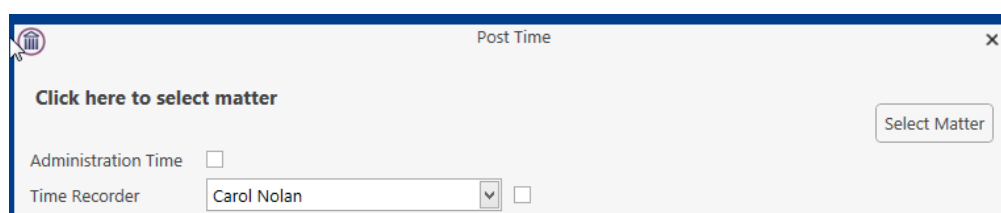
4. Click on the **Green Plus** to add an empty timer.

5. Click on clock to start the timer.

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



7. **Double click** the entry to add details for posting. This will bring up the Post Time dialogue box (see How to Post Time from the Timer, p. 83 above), but without a matter code.



8. Input/Amend the following details as required:

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

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

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

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

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

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

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

Comment Input a narrative to describe the time entry

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

How to create a manual time slip

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

Post Time

BLO001/0005
 Joe Bloggs
 Test Matter sale purchase

Administration Time ☐

Time Recorder ☐

Date

Time ☒ Minutes ☐ Units ☐ Hours ☐ Days

Time/Charge ☒ Time ☐ Charge

Hours X Rate = Charge ☒ Is Chargeable

Task

Suggested Narrative

Save Save & Finish Cancel

2. Click on **Post time** on the Home tab to open a Time slip.

3. **Input** or Amend the following details

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

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

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

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

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

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

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

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

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

How create an Admin Time slip

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

The screenshot shows the 'Post Time' dialog box. The 'Administration Time' checkbox is checked and circled in red. The 'Non Chargeable Code' dropdown is set to 'Select non chargeable code'. The 'Time Recorder' dropdown is set to 'Brian Sweeney'. The 'Date' dropdown is set to '07 Aug 2015'. The 'Time' section has radio buttons for 'Minutes', 'Units', 'Hours', and 'Days'. The 'Minutes' radio button is selected, and the input box shows '1.00'. The 'Units' input box shows '0.17'. The 'Hours' input box shows '0:01'. The 'Days' input box shows '0.00'. There is a 'Suggested Narrative' button on the right. At the bottom are 'Save', 'Save & Finish', and 'Cancel' buttons.

- Add the following details:

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

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

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

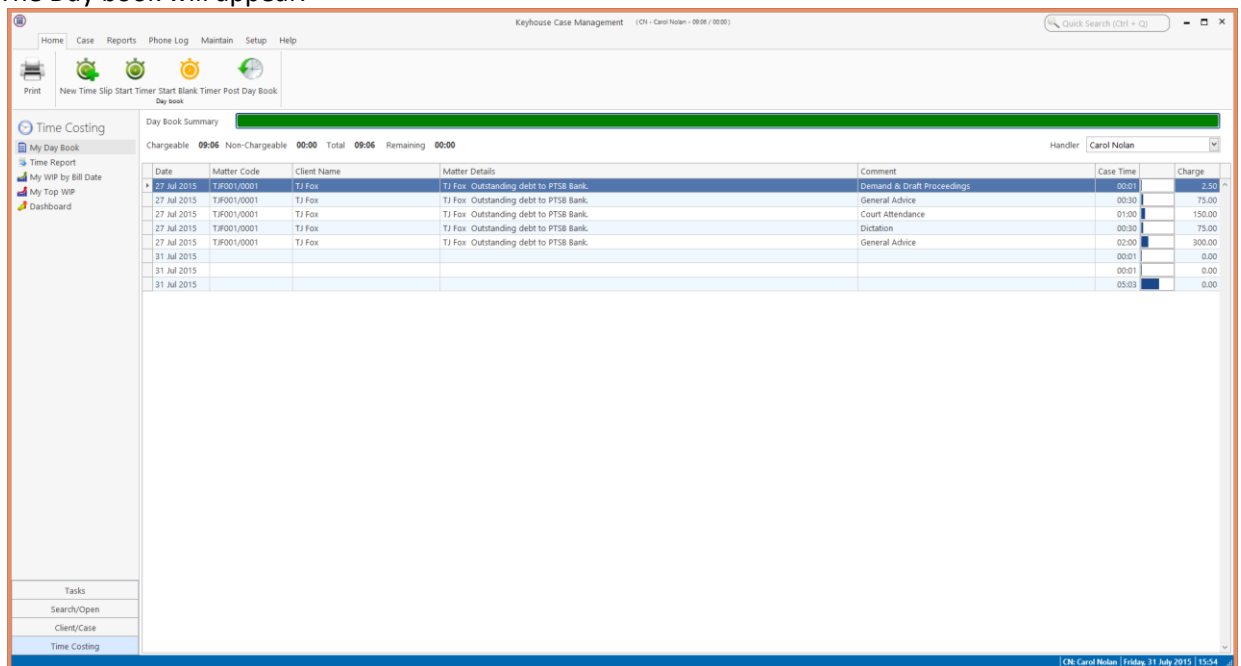
Comment **Input** a narrative to describe the time entry

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

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

How to View the Day Book from the Timer

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



The screenshot shows the 'Day Book Summary' window in the Keyhouse Case Management software. The window has a navigation bar on the left with options like 'My Day Book', 'Time Report', 'My WP by Bill Date', 'My Top WP', and 'Dashboard'. The main area displays a table with columns: Date, Matter Code, Client Name, Matter Details, Comment, Case Time, and Charge. The table shows several entries for 'TJ Fox' with various comments like 'Outstanding debt to PTSB Bank', 'General Advice', 'Court Attendance', and 'Dictation'. The 'Case Time' column shows durations like 00:01, 00:30, 01:00, 00:30, 02:00, 00:01, and 05:03. The 'Charge' column shows amounts like 75.00, 150.00, 75.00, 300.00, and 0.00. At the top of the table, there is a summary row: Chargeable 09:06, Non-Chargeable 00:00, Total 09:06, Remaining 00:00. The handler is listed as 'Carol Nolan'.

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

My Day Book

Viewing the Day Book

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



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

How create a Time slip in the Day Book

- Click on **New Time Slip** on Home Tab in **My Day Book**. The familiar Post Time dialogue box (see How to create a manual time slip, p. 86 above) will appear.

2. Provide details such as the matter, date, time, task etc. For further information see the section on How to create a manual time slip, p. 86 above.
3. When all details have been entered click **Save**. The time slip will appear in the Daybook ready for posting.

How to create an Admin Time slip in the Day Book

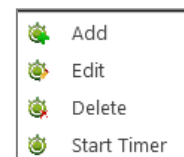
1. Click on **New Time Slip** on the Home tab in **My Day Book**. The Post Time dialogue box will appear.
2. Check the Administration Time box. The screen will change to display the options for Administration time (see How create an Admin Time slip, p. 87 above).
3. Complete the details of Date, Time, Non-Chargeable Code and Comment as above, How create an Admin Time slip, p. 87.
4. Click on **Save and Finish**. This time entry is then added to the daybook ready for posting to time ledger.

How to amend a Time Slip

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

How to Delete a Time Slip

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



How to Post the Day Book

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

Accessing the Time Ledger Screen

Viewing the time Ledger

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

HomeCaseReportsPhone LogMaintainSetupHelp

PrintStart TimerPost TimeAccounts

Draft Invoice

Billing GuideTime Ledger

Client/Case

Case Diary

Document Manager

Current Client Details

Current Case Details

Other Case Details

Associates

Critical Information

A/c Ledger

Time Ledger

Debt Ledger

Reserve Ledger

Undertakings

Strong Room

Case: AB8001/0004George J AbbottRemortgage 44 Main Street

Tel: 01-565F/e: JP

Date	Comment	Time or Charge	Time	C/N-C	Charged	Billed Amount	Invoice No	Task	T/R
22 May 2008	Billed Fees: 0.00	Bill	0	Chargeable	0.00	0.00	45345	BILLED	Justin Phelan
22 May 2008	Billed Fees: 1230.00	Bill	0	Chargeable	(7,715.00)	0.00	54	BILLED	Justin Phelan
09 Feb 2009	Client Meeting	Time	19	Chargeable	96.00	96.00	7	MEET	Justin Phelan
19 Mar 2009	Legal Letter	Time	19	Chargeable	96.00	96.00	7	Letter Drafting	Justin Phelan
14 Apr 2009	Document Drafting - lease of easment	Time	65	Chargeable	324.00	324.00	7	Document Drafting	Justin Phelan
14 Apr 2009	General drafting Lease of Easements	Time	82	Chargeable	411.00	411.00	7	Document Drafting	Justin Phelan
15 May 2009	Attendance	Time	40	Chargeable	201.00	201.00	7	Attendance	Justin Phelan
17 Aug 2009	Research & 2 letters	Time	67	Chargeable	336.00	336.00	7	Research	Justin Phelan
24 Aug 2009	Telephone Attendance	Time	11	Chargeable	54.00	54.00	7	TEL	Justin Phelan
02 Sep 2009	Reading in	Time	10	Chargeable	68.00	68.00	7	EMA	Justin Phelan
07 Sep 2009	Various Work-review of file, calculation of pe...	Time	52	Non Chargeable	261.00	261.00	7	File Review	Stephen Keogh
07 Sep 2009	Various Work-review of file and dictation me...	Time	36	Non Chargeable	180.00	180.00	7	File Review	Stephen Keogh
10 Sep 2009	Drafting Documents	Time	30	Chargeable	145.00	145.00	7	Document Drafting	Carol Nolan
14 Sep 2009	New Company Formation, Draft SHA for New...	Time	255	Chargeable	1,062.50	1,062.50	7	File Review	Justin Phelan
11 Oct 2009	File Review	Time	19	Chargeable	96.00	96.00	7	File Review	Justin Phelan
10 Feb 2010	Billed Fees: 0.00	Bill	0	Chargeable	(3,666.19)	0.00	7	BILLED	Justin Phelan

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

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

How to Create a Draft Invoice from the Time Ledger Screen

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

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

Draft Invoice

Message: _____

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

Matter Details

Matter: FLY001/0002 Jack Flynn

Fee Earning: Carol Nolan

Description: Purchase of 16 The Haywain, Terenure, Dublin 6

Date: 07 Aug 2015 ☐ Transfer To Pay

Bill To: Jack Flynn
4 The Mews
Rathfarnham
Dublin 6a

Client

Our Ref: CN Your Ref: _____

Write down Time to: 07 Aug 2015

Summary

Bills: 0.00
Outlay: 0.00
Client: 0.00
Charges: 1,102.50
Time (HH:MM): 7:21

Invoice Details

Type	Narrative	Net	VAT Value	Fee Earning
Right-Click for Options				

Fees: 0.00 Outlay: 0.00 Miscellaneous Fees: 0.00 VAT: 0.00 Bill Total: 0.00

Requested By: Carol Nolan Draft Number: (new)

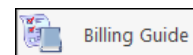
Message	Input a message for the account department (optional)
Type	Invoice will be checked by default. Select Credit Note if required.
Open Invoice	To create an open invoice, check the Open Invoice box.
Bill Sent	Check when the bill is actually sent.
Matter	This will show the current case by default;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

Client

4. The time and outlay to be included in the bill may be input using the **Billing Guide Wizard** or manually.

a. Using the **Bill Guide Wizard**

i) Click on **Billing Guide** at the bottom left corner to start the Billing Guide Wizard.



ii)

The left-hand column deals with time, the right-hand one with outlay. In each column, you may select a **date** or enter an **amount**. Different dates may be selected for time and outlay. If you select a date, the time (or outlay) will be written down to that date; if you specify an amount, sufficient time (outlay) will be written down to make up the required amount, with the remainder remaining unbilled and available for inclusion in future invoices.

The options for grouping time are:

- Single line of fees — the fee earners will not be listed individually.
- Group by Fee earner — the total for each fee earner will be listed on its own line.
- No grouping — each item will be listed as recorded.

If the box marked No Time/Fees is checked, no time will be included in the bill; all recorded time will remain available for inclusion in future bills.

The options for grouping outlay are similar:

- Single Line of Outlays — a total figure for outlay will be given without listing items separately. You can also run a report that will detail the individual items by clicking on the Report Button.

Soo Grabbit & Runne VAT No : 8746675DD					
Jack Flynn 4 The Mews Rathfarnham Dublin 6a			Date: 07/08/2015 Invoice No : 0 Our Ref: FLY001/0002		
Date	Billing Description	Time	Net Fees	VAT Amount @ 23%	Net Outlay
OurRef	YouRef				
FLY001/0002	Purchase of 16 The Haywain, Terenure, Dublin 6				
03/07/2015	Demand & Draft Proceedings	00 : 50	125.00	28.75	
03/07/2015	Attendance	00 : 30	75.00	17.25	
03/07/2015	Demand & Draft Proceedings	03 : 01	452.50	104.08	
03/07/2015	Court Attendance	02 : 00	300.00	69.00	
BODetail:DATE(DateTime)					
Matter Totals:		06 : 21	952.50	219.08	0.00
Net Grand Totals:		06 : 21	952.50	219.08	0.00

- Group by Outlay Type — the outlay can be grouped to show the total for each type of outlay, such as medical reports and stamp duty, if each item of expenditure has been allocated to a type.
- No Grouping — each item of outlay will be listed in the order in which it was entered.

iii) Click **Regenerate Billing Guide** to continue to the next screen.

This example shows no Grouping on either fees or outlays

iv) Items can be amended in this screen below are a list of options:

How to Partially Bill an Item

- Double-click the item to be changed:
- Click the figure in the **Bill Now** column and change the amount. The **Action** will change to **Partially Billed**.
- Click **OK** to save the change.

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

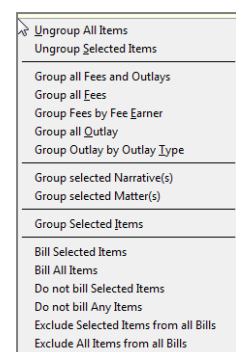
Total Fees: 952.50
Total Outlay: 952.50
Grand Total: 952.50

Action	Type	Matter	Handler	Outlay	Description	Outstanding	Bill Now
Bill Partially	F	GLE001/0001	BS		Attendance on client	600.00	300.00

How to exclude an action item from a bill

- Click the item to be excluded.
- **Tip** to exclude more than one item hold down the CTRL key on your keyboard and click on each of the items.

- **Right-click** the selection and choose one of the following commands from the pop-up menu:
 - **Do not bill Selected Items** — the items will be excluded from the current bill only;
 - **Exclude Selected Items from all Bills** — the items will not be included in any future bill.

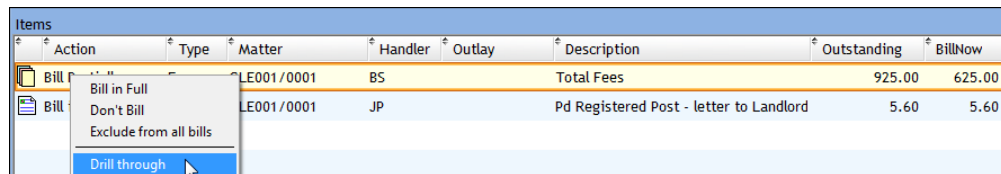


To Add Grouping Levels

Right click on an item and select the required Grouping option from the pop-up menu

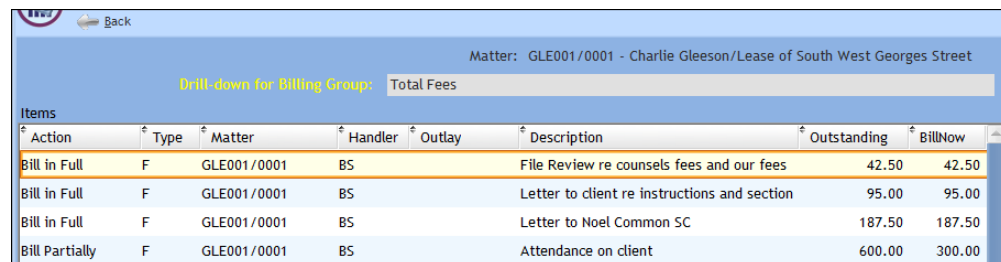
How to Drill down to view all items in a group

- Click on a grouped item and select **Drill Through** from the pop-up menu.



Action	Type	Matter	Handler	Outlay	Description	Outstanding	BillNow
Bill		GLE001/0001	BS		Total Fees	925.00	625.00
Bill		GLE001/0001	JP		Pd Registered Post - letter to Landlord	5.60	5.60

- The items of fees or outlay included in the group will be listed individually and may be changed as described above.



Action	Type	Matter	Handler	Outlay	Description	Outstanding	BillNow
Bill in Full	F	GLE001/0001	BS		File Review re counsels fees and our fees	42.50	42.50
Bill in Full	F	GLE001/0001	BS		Letter to client re instructions and section	95.00	95.00
Bill in Full	F	GLE001/0001	BS		Letter to Noel Common SC	187.50	187.50
Bill Partially	F	GLE001/0001	BS		Attendance on client	600.00	300.00

- Click the **Back** button to return to the previous screen.
- v) When complete:
- Click **OK** to update the draft. A message will ask whether you want to recalculate the **Fee Earner Breakdown** based on the changes to the Billing Guide. Click **Yes** to recalculate or **No** if you do not wish to recalculate.
- OR**
- Click the **Add to Invoice** button when you are ready to update the invoice. A message will ask whether you want to recalculate the **Fee Earner Breakdown** based on the changes to the Billing Guide. Click **Yes** to recalculate or **No** if you do not wish to recalculate.

b. Adding a Line to the bill manually

Type	Narrative	Net	VAT Value	Fee Earning
F	Document Drafting	150.00	34.50	Carol Nolan
F	Phone Call	27.50	6.33	Carol Nolan
F	Advice on Contract	400.00	92.00	Carol Nolan

- i) Right-click in the **Invoice Details** screen to see the pop-up menu.
- ii) Select **Add a Bill Detail Line**.
- iii) On the **Add or edit Bill Detail Line** screen, input a narrative and amount and change the default information as necessary.

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

c. How to amend the Fee Earning Breakdown

- i) Click the **Fee Earning Breakdown** Tab.

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

Add a Bill Detail Line
 Clear Bill Detail Lines

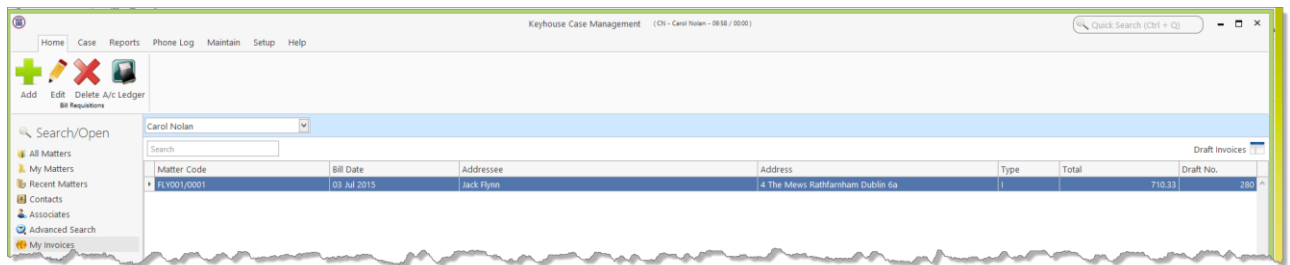
The breakdown will have been calculated automatically, based on time charged in the invoice in respect of each fee earning.

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

- iii) In the Edit Fee Earner Breakdown window, you may choose to edit the breakdown either by percentages or values. Choose one or the other, then click in the relevant column to change the percentages or values.

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

- iv) Alternatively, you may right-click on any of the fee earners and select the required command from the pop-up menu.
- v) If you select **Add Fee Earner**, you will be able to choose from a list of fee earners by double-clicking.
- vi) If you select **Cut Fee Earner allocation for [Fee Earner Name]**, that fee earner's allocation will be removed from the breakdown
- vii). In either case, you will be returned to the **Edit Fee Earner Breakdown** screen, where you can alter the percentages or values as described in iii) above.
- viii) Click **OK** to save the changes and be returned to the **Draft Invoice** screen.
5. Click **OK** on the left-hand column of the **Draft Invoice** screen to save the draft bill or **Release** to send to accounts for approval.
6. The Draft Bill will appear as an entry in the case diary for future review.
- | | | | |
|-------------|-------|----|-------------------------------|
| 15 Nov 2014 | 14:03 | CN | Draft Bill Draft Bill No: 268 |
|-------------|-------|----|-------------------------------|
7. To view the draft invoice, double-click the entry and amend as required. Then click **Release** as in 5 above to send to accounts for approval.
8. Once the invoice has been released by Accounts the Draft Invoice will disappear from the Case Diary and be replaced by the Invoice.
9. All draft invoices can be seen in in My Invoices on the Search/Open screen



Create a Billing Guide Report

1. **Open** a case in the Case Diary.
2. Click on **Time Ledger** on the **Case Diary** Navigation panel.
3. Select **Billing Guide** on the Home tab to bring up a screen asking for parameters for the Billing Guide report.

- a. Specify the date down to which the report is to be prepared
- b. Enter the matter code. The current case will be shown by default

Billing Guide Report

Enter Parameters

Matter code: FLY001/0001

To Date: 10 Aug 2015

Run Close

4. Click **Run**. The report will be generated showing the Billing Guide.



Soo Grabbit & Runne

Billing Guide Report

As at : 31/07/2015

FLY001/0001	Jack Flynn Sale of House at: 4 The Mews, Rathfarnham, Dublin 6
-------------	---

Date	FE	Comment	Task	Time Hrs:Min	Accum. Hrs:Min	Rate	Charge	Accum Charge	OS Charge
03/07/2015	CN	Phone Call	PHO	0 : 11	0 : 11	150.00	27.50	27.50	27.50
03/07/2015	CN	Document Drafting	DRA	1 : 00	1 : 11	150.00	150.00	177.50	150.00
03/07/2015	CN	Phone Call	PHO	0 : 10	1 : 21	150.00	25.00	202.50	25.00
03/07/2015	CN	Draft Bill No274	DRA	0 : 30	1 : 51	150.00	75.00	277.50	75.00
03/07/2015	CN	Attendance	ATT	0 : 02	1 : 53	150.00	5.00	282.50	5.00
TOTAL					1 : 53				282.50

Summary WIP Fee Earner

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

Unbilled Outlay

Date	Ref	Narrative	UnBilled Outlay	Cumulative UnBilled Outlay

UnBilled Total

The Report may be exported to a Word document (DOC), PDF or an Excel spreadsheet (XLS)

Additionally, you may use the toolbar to **Print** the report, **Refresh** it or **Export** it as a Crystal report, or to **Search** for a word or phrase.

The Time Report

1. Click **Time Report** on the Navigation panel in **Time Costing**.

Time Costing

- My Day Book
- Time Report**
- My WIP by Bill Date
- My Top WIP
- Dashboard

Time Ledger for Fe between dates

Enter Parameters

Handler Code	CN	▼	
From Date	01 Jul 2015	[15]	
To Date	31 Jul 2015	[15]	
Chargeable or NonChargeable Items	All	▼	

Run
Close

Input the parameters for the report: the Handler Code, and dates from and to which the report is to be generated

2. Click **Run**. The report may be exported, printed or searched in the same way as the **Billing Guide** report above.

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Time Entry For FE Between Dates Report

Data Date : 10/08/2015, 9:05
From Date : 01/07/2015
To Date : 31/07/2015

CN : Carol Nolan

Matter	Client	Matter Description	Hrs:min	Rate	Charge Task	Comment
Time Entry Date : 03/07/2015						
Admin Time			0 : 10	€0.00	€0.00	
			3 : 00	€0.00	€0.00	Golf Tournament
			30 : 01	€0.00	€0.00	
AIG001/0002	Allied Investment Group	Garry Barlow -> Hired Talent Services	2 : 00	€150.00	€300.00 DIC Dictation	Dictation
BLA001/0001	Gordon T Black	RTA Walskinstown Crossroads, G. Black	0 : 30	€150.00	€75.00 ATT Attendance	Attendance
BLO001/0005	Joe Bloggs	Advice File	0 : 00	€0.00	€570.00 ADV Advice	obility/v-y
BRE001/0001	Mike Breeze	Broken left leg.	1 : 00	€150.00	€150.00 DIC Dictation	Talked with Mike re options for settlement
			1 : 00	€150.00	€150.00 DIC Dictation	Dictation to Doctor and Opposing Council
			0 : 30	€150.00	€75.00 REV File Review	Review Medical Report
			1 : 00	€150.00	€150.00 INS Instructions received	Instructions received Meeting with Client
			1 : 00	€150.00	€150.00 COU Court Attendance	Court Attendance
FLY001/0001	Jack Flynn	Sale of House at: 4 The Meurs, Rathfarnham, Dublin 6	0 : 11	€150.00	€27.50 PHO Phone Call	Phone Call
			1 : 00	€150.00	€150.00 DRA Document Drafting	Document Drafting
			0 : 10	€150.00	€25.00 PHO Phone Call	Phone Call
			0 : 30	€150.00	€75.00 DRA Document Drafting	Draft Bill No274
FLY001/0002	Jack Flynn	Purchase of 16 The Haywain, Tenure, Dublin 6	0 : 02	€150.00	€60.00 ATT Attendance	Attendance
			0 : 50	€150.00	€125.00 DEM Demand & Draft Proceedings	Demand & Draft Proceedings
			1 : 00	€150.00	€150.00 COU Court Attendance	Court Attendance
			0 : 30	€150.00	€75.00 ATT Attendance	Attendance
			3 : 01	€150.00	€450.00 DEM Demand & Draft Proceedings	Demand & Draft Proceedings
			2 : 00	€150.00	€300.00 COU Court Attendance	Court Attendance
03/07/2015						
			Daily Time	Daily Value		
Daily Recorded Mins:			49 : 25		Admin (Hrs):	33 : 11
Chargeable (Hrs):			10 : 14	€3,005.00	Unassigned (Hrs):	0 : 00
Non-Chargeable (Hrs):			0 : 00	€0.00	Write Offs (Hrs):	0 : 00
			€3,005.00			

X:\house\lgabit\ssn\time entry.docx

Page 1 of 2

My WIP by Bill Date

1. Click **My WIP by Bill Date** on the Navigation panel in **Time Costing**.

WIP is Work in Progress i.e. unbilled time

Soo Grabbit & Runne						
WIP for Fee Earner by Last Bill Date						
Data Date : 10/08/2015: 9:08						
Started	Last Bill Date	Matter	Client Name	Description	Client A/C	WIP
CN Carol Nolan						
31/01/2012		ABB002/0002	Abbie Lynch	Share Holding Agreement	0.00	300.00
29/05/2014		AIG001/0002	Allied Investment Group	Garry Barlow -v- Hired Talent Services	0.00	300.00
02/12/2005		BES001/0001	Business Time Limited	Lease of Unit 33, Eastgate Avenue, Dublin 12.	0.00	301.20
03/07/2015		BRE001/0001	Mike Breeze	Broken left leg.	0.00	675.00
29/09/2011		BRO002/0001	Thomas Brolin	Legal Advice re Repatriation	(200.00)	110.00
24/05/2011		FIN001/0002	Finance Department	Damages - 21 Main Street	0.00	6.00
02/07/2015		FLY001/0001	Jack Flynn	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6	0.00	282.50
02/07/2015		FLY001/0002	Jack Flynn	Purchase of 16 The Haywain, Terenure, Dublin 6	0.00	1,102.50
15/03/2012		LAW002/0001	Margaret Lawlor	Debt collection against husband	0.00	10.00
02/05/2012		LOW001/0001	Lowery Developments	Receivership - Nama Properties 1 Sandyford Estate	(2,100.00)	2,105.00
02/05/2012		LOW001/0003	Lowery Developments	Receivership - Nama Properties - No 3 Sandyford Estate	(925.00)	625.00
01/01/2010		QUI002/0001	Niall Quinn	Accident at work	(2,000.00)	363.00
23/09/2010		SHA001/0003	John Shaw	Jones Trust	0.00	49.50
06/07/2015		TJF001/0001	TJ Fox	Outstanding debt to PTSB Bank.	0.00	312.50
2011 May						
08/05/2010	12/05/2011	BLA001/0001	Gordon T. Black	RTA Walkinstown Crossroads, G. Black	0.02	1,075.00
December						
02/05/2012	31/12/2011	LOW001/0004	Lowery Developments	Receivership - Nama Properties - No 81 Sandyford Business Park	(925.00)	192.00
02/05/2012	31/12/2011	LOW001/0005	Lowery Developments	Receivership - Nama Properties - South County Dublin - Disputed	(1,000.00)	667.50
2012 January						
02/05/2012	31/01/2012	LOW001/0002	Lowery Developments	Receivership - Nama Properties No 2 Sandyford Estate	(925.00)	225.00
March						
10/11/2011	06/03/2012	LAW001/0001	Liz Lawlor	Advice re Inheritance tax	(5,000.00)	147.00
2014 June						
20/05/2011	19/06/2014	ABA001/0001	David Abrahams	Family Law	(7,737.17)	4.00
					Chargeable WIP	9,961.70
					Non-Chargeable WIP	-
					Report WIP Totals :	9,961.70
* Non-Chargeable Time						

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

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

My Top WIP

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

Soo Grabbit & Runne

Top Work In Progress By Fee Earner

Data Date : 10/08/2015: 9:42
 Fee Earner : CN
 Including chargeable and nonchargeable time

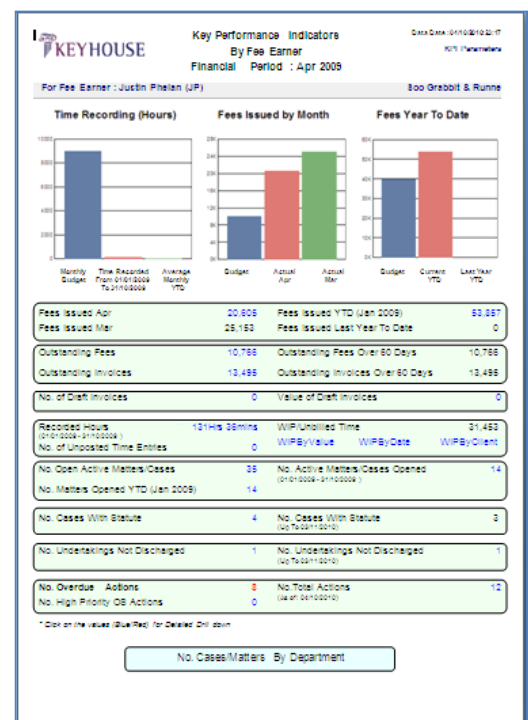
Matter	Last Bill Date	Client Name	Matter Description	Client A/c	WIP
CN Carol Nolan					
LOW001/0001		Lowery Developments	Receivership - Nama Properties 1 Sandyford Estate	(2,100.00)	2,105.00
FLY001/0002		Jack Flynn	Purchase of 16 The Haywain, Terenure, Dublin 6	0.00	1,102.50
BLA001/0001	12/05/2011	Gordon T. Black	RTA Walkinstown Crossroads, G. Black	0.02	1,075.00
BRE001/0001		Mike Breeze	Broken left leg.	0.00	675.00
LOW001/0005	31/12/2011	Lowery Developments	Receivership - Nama Properties - South County Dublin - Disputed Sale of 12 Main Street, Bray, Co. Wicklow	(1,000.00)	667.50
QUI001/0005	05/06/2010	Alan Quinn	Receivership - Nama Properties - No 3 Sandyford Estate	0.00	663.00
LOW001/0003		Lowery Developments	Receivership - Nama Properties - No 3 Sandyford Estate	(925.00)	625.00
DEA001/0001	03/08/2010	James Deane	RTA Whites Cross, Stillorgan	0.00	375.00
QUI002/0001		Niall Quinn	Accident at work	(2,000.00)	363.00
TJF001/0001		TJ Fox	Outstanding debt to PTSB Bank.	0.00	312.50
BES001/0001		Business Time Limited	Lease of Unit 33, Eastgate Avenue, Dublin 12	0.00	301.20
ABB002/0002		Abbie Lynch	Share Holding Agreement	0.00	300.00
AIG001/0002		Allied Investment Group	Garry Barlow -v- Hired Talent Services	0.00	300.00
FLY001/0001		Jack Flynn	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6	0.00	282.50
LOW001/0002	31/01/2012	Lowery Developments	Receivership - Nama Properties No 2 Sandyford Estate	(925.00)	225.00
LOW001/0004	31/12/2011	Lowery Developments	Receivership - Nama Properties - No 81 Sandyford Business Park	(925.00)	192.00
LAW001/0001	06/03/2012	Liz Lawlor	Advice re Inheritance tax	(5,000.00)	147.00
BRO002/0001		Thomas Brolin	Legal Advice re Repatriation	(200.00)	110.00
SHA001/0003		John Shaw	Jones Trust	0.00	49.50
TAL001/0001	16/11/2010	Deirdre Talbot	Drunk Driving Arrest - 6th September 2009	0.00	42.50
SIM001/0001	25/04/2010	Bart Simpson	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6	0.00	25.50
LAW002/0001		Margaret Lawlor	Debt collection against husband	0.00	10.00
FIN001/0002		Finance Department	Damages - 21 Main Street	0.00	6.00
ABA001/0001	19/06/2014	David Abrahams	Family Law	(7,737.17)	4.00
FIT001/0001	06/06/2010	Scott Fitzpatrick	Estate of Joan Fitzpatrick	(480.75)	3.00
Report Totals					9,961.70

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

KPI Reports

- Click **Dashboard** on the Navigation panel in **Time Costing** to see the Key Performance Indicators report for the fee earner who is logged in.
- Click on the figures in **blue** or **red** to view a subreport containing a breakdown of the details that make up that figure.
- In the subreport, click the **Preview** tab to return to the main KPI report.
- The options to **Export**, **Print** and **Search** the KPI Report are the same as those for the other reports described above.

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



Chapter 11: Accounts

Account Functions in the Case Diary

View the Matter Ledger

1. **Open** a case in the Case Diary.
2. Click on **A/C Ledger** on the Case Diary Navigation panel.
3. The following screen will appear.

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

Note: For further information on the matter ledger see the SAM Accounts Manual.

Run a Report on client balances

1. **Open** a case in the Case Diary.
2. Click on **A/C Ledger** on the Case Diary Navigation panel.
3. Click on the **client balances** icon on the Home tab of the Ribbon. The following screen will appear.
4. It will default to the current client; select a different client from the drop-down list, if required.
5. A report will appear listing all matter balances for this client.

View Report

DOC PDF XLS

Type the text to find

Soo Grabbit & Runne
Matter List
(Incl. Fwd Postings)

(Last Posting: 06/09/2012)

HAL002	Hire Banking Ltd			Billing A/c	Outlay A/c	Client Cur.	Client Dep.
0000	0000 Matter	GEN	AD	0.00	0.00	0.00	0.00
0001	Debt Recovery - Jack Johnston	LIT	MV	1,968.42	0.00	0.00	0.00
0002	Debt Recovery - Mary Ascond	DEB	MV	4,650.96	0.00	0.00	0.00
Total Matters: 3				Total Balances:	6,619.38	0.00	0.00

* = Billed

Page 1 of 1 | Main Report

How to set a reserve amount

1. **Open** a case in the Case Diary.
2. Click on **A/C Ledger** on the Case Diary Navigation panel.
3. Click on **Set Client Reserve** on the Home tab, and the following screen will appear.
4. **Input** an amount and a comment.
5. Click **OK**; the reserve amount will then appear on the matter ledger.

Set Client A/C Reserve

Reserve
6,000.00

Comment for Ledger
Reduced amount

Ok Cancel

How to add a comment

1. **Open** a case in the Case Diary.
2. Click on **A/C Ledger** on the Case Diary Navigation panel.
3. Click on the **Comment** icon on the Home tab.
4. Input a comment.
5. Click **OK**; the comment will then appear on the matter ledger.

Add Comment

Date
15 Nov 2014

Paying in Part Payments

Ok Cancel

How to Create a Cheque Request

1. **Open** a case in the Case Diary.
2. Click on **A/C Ledger** on the Case Diary Navigation panel.
3. Click on **Request Cheque** on the Home tab.
4. Input the following information:

Bank	Select the required bank account from the drop-down list.
Date	Today's date will be shown by default. Change as necessary.
Payee	Input the Payee's name or select from the supplier drop-down list.
Value	Input the amount of the cheque.

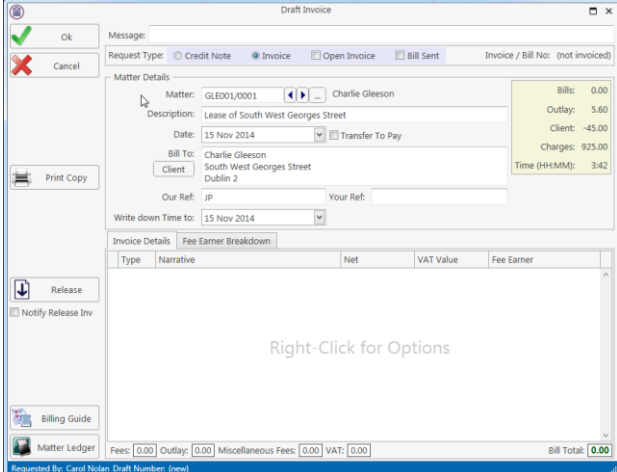
Fee Earner	This will default to the current fee earner. Select a different fee earner from the drop-down list if required.
Third Party	Check the box if this is a third party cheque.
Narrative	Input a cheque narrative or click on the down arrow to pick from a list of narratives.
Notes	Input a note to the Accounts Department if required.
Matter	This will show the current case. To select a different case, click on the browse button for the matter list and double-click the required case.
Notify Release	Check this box if you want an email to be sent to the Accounts Department when the cheque has been released.
Ledger Narrative	By default to the cheque narrative will be shown but it can be amended either manually or by selecting from the drop-down list.

5. To release the cheque to accounts click **Release**. Alternatively to hold the cheque in your cheque list click OK.

How to Create a Draft Invoice

10. **Open** a case in the Case Diary.
11. Click on **A/c Ledger** on the **Case Diary** Navigation panel.
12. Click on **Draft Invoice** on the Home tab while in **A/c Ledger**. A Draft Invoice screen will appear.

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



Message **Input** a message for the Accounts Department (optional)

Type **Invoice** will be checked by default; select **Credit Note** if required.

Open Invoice Check the box to create an open invoice.

Bill Sent This box is to be checked when the bill is actually sent.

Matter This will default to the current case; to change the case click on the browse button to bring up a matter list and double-click the required case.

Description This will default to the matter description to amend click in the input box provided and amend.

Date The date will default to today's date but may be changed.

Transfer to Pay If this is checked, funds will be transferred from the client account to pay the bill.

Bill to The client details will be shown by default, but the name and/or address may be changed. Click the **Client** button to

Client

Our Ref This will default to the Fee Earner's initials, but may be amended if required.

Your Ref **Input** a reference if applicable.

Write down time to Today's date will be shown by default. You may choose a different date for the time to be written down to.

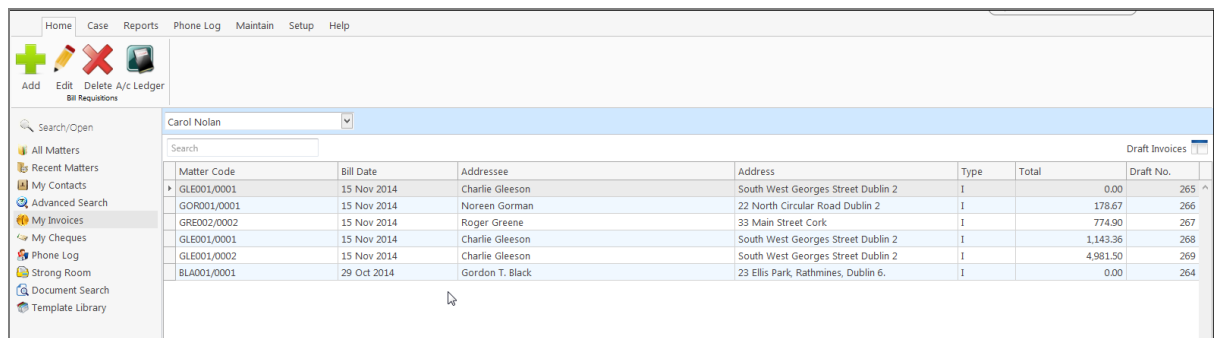
13. Insert the Bill Details: this can be done by importing time and outlays using the **Billing Guide Wizard** or by manually inputting fees and outlays.

See Chapter 10, above for particulars of how to use the Billing Guide wizard and manually adding time and outlay to a bill.

My Draft Invoices

How to View My Invoices

1. Click on **Search/Open** on the Navigation panel.
2. Select **My Invoices** on the Navigation panel to display a list of your draft invoices.



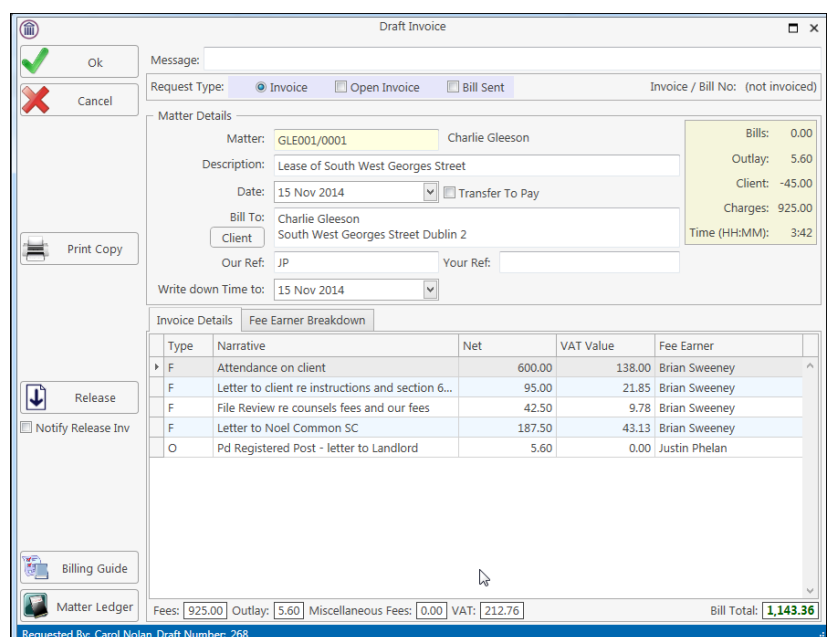
Matter Code	Bill Date	Addressee	Address	Type	Total	Draft No.
GLE001/0001	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	0.00	265
GOR001/0001	15 Nov 2014	Noreen Gorman	22 North Circular Road Dublin 2	I	178.67	266
GRE002/0002	15 Nov 2014	Roger Greene	33 Main Street Cork	I	774.90	267
GLE001/0001	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	1,143.36	268
GLE001/0002	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	4,981.50	269
BLA001/0001	29 Oct 2014	Gordon T. Black	23 Ellis Park, Rathmines, Dublin 6.	I	0.00	264

How to Add a Draft Invoice

1. Click **Add** on the Home tab while viewing **My Invoices** as described above.
2. A draft Invoice will appear.
3. Complete as previously described in How to Create a Draft Invoice, p. 104 above.

How to Edit a Draft Invoice

1. Go to **My Invoices** as described above.
2. Either select the invoice to be edited and click the **Edit** icon on the Home tab or **double-click** the invoice in the list.
3. **Edit** the invoice as required.
4. Click **OK** to save the changes or click **Release** to save the change and send to Accounts for approval.



Draft Invoice

Message:

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

Matter Details

Matter: GLE001/0001 Charlie Gleeson

Description: Lease of South West Georges Street

Date: 15 Nov 2014 ☐ Transfer To Pay

Bill To: Charlie Gleeson

Client: South West Georges Street Dublin 2

Our Ref: JP Your Ref:

Write down Time to: 15 Nov 2014

Summary

Bills: 0.00
Outlay: 5.60
Client: -45.00
Charges: 925.00
Time (HH:MM): 3:42

Invoice Details **Fee Earner Breakdown**

Type	Narrative	Net	VAT Value	Fee Earner
F	Attendance on client	600.00	138.00	Brian Sweeney
F	Letter to client re instructions and section 6...	95.00	21.85	Brian Sweeney
F	File Review re counsels fees and our fees	42.50	9.78	Brian Sweeney
F	Letter to Noel Common SC	187.50	43.13	Brian Sweeney
O	Pd Registered Post - letter to Landlord	5.60	0.00	Justin Phelan

Fees: 925.00 Outlay: 5.60 Miscellaneous Fees: 0.00 VAT: 212.76 Bill Total: 1,143.36

Requested By: Carol Nolan Draft Number: 268

How to Delete a Draft Bill

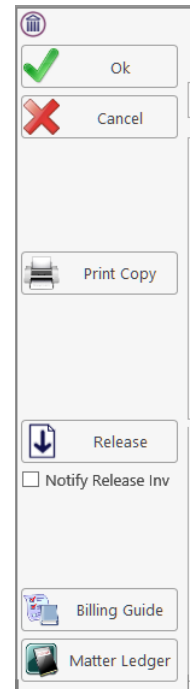
1. Go to **My Invoices** as described above and select the invoice which is to be deleted.
2. Click on **Delete** on the Home tab or press **Delete** on your keyboard; you will be asked to confirm the deletion.
3. Click **OK** to delete.

How to Release a Draft Bill to Accounts

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

How to Print a Draft Bill

1. Go to **My Invoices**
2. **Double click** on the bill you want to Print; the draft bill will appear.
3. Click on the **Print Copy** button.
4. Click on **Print** located on the report toolbar to print the draft bill.



View Report

DOC PDF XLS

Type the text to find

Print

INVOICE		
DRAFT		
Charlie Gleeson South West Georges Street Dublin 2	15 Nov 2014	
Account Ref: GLE001.0001	Our Ref: JP	
Invoice No: 0	Your Ref:	
Lease of South West Georges Street	Not Liabie to VAT €	Liabie to VAT €
Attendance on client		600.00
Letter to client re instructions and section 68 letter		95.00
File Review re counsels fees and our fees		42.50
Letter to Noel Common SC		187.50
Pd Registered Post - letter to Landlord	5.60	
E&OE		
SUBTOTALS	5.60	925.00
925.00 @ 23.00 % VAT		212.76
Add total not subject to VAT		5.60
INVOICE TOTAL:		1,143.36

My Cheques

How to Create a Cheque Request

1. View **My Cheques** as described above.
2. Click **Add** on the Home tab.
3. Input the following information:

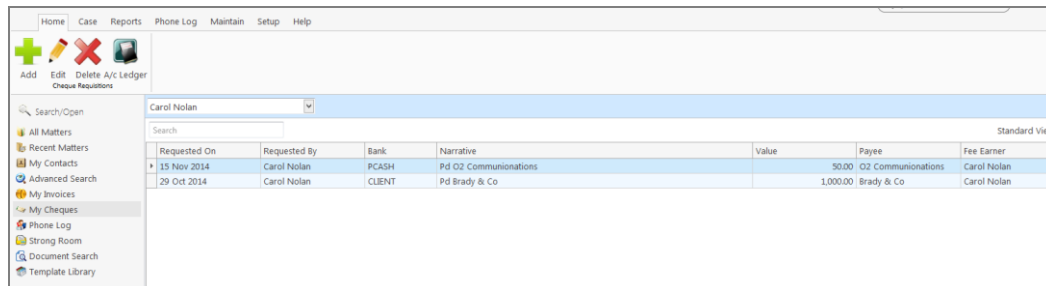
Bank	Select from the drop-down list.
Date	Today's date will be shown by default; change as required.
Payee	Input the Payee's name or select a supplier from the drop-down list.
Value	Input the amount of the cheque.

Fee Earner	This will default to the current fee earner. Select a different fee earner from the drop-down list if required.
Third Party	Check the box if this is a third party cheque.
Narrative	Input a cheque narrative or click on the down arrow to pick from a list of narratives.
Notes	Input a note to the Accounts Department if required.
Matter	This will show the current case. To select a different case, click on the browse button for the matter list and double-click the required case.
Notify Release	Check this box if you want an email to be sent to the Accounts Department when the cheque has been released.
Ledger Narrative	By default to the cheque narrative will be shown but it can be amended either manually or by selecting from the drop-down list.

4. To release the cheque to accounts click **Release**. Alternatively to hold the cheque in your cheque list click **OK**.

How to View My Cheques

1. Click on Search/Open on the Navigation.
2. Click on **My Cheques** on the Navigation panel. A list of your draft cheques will be displayed.



Requested On	Requested By	Bank	Narrative	Value	Payee	Fee Earner
15 Nov 2014	Carol Nolan	PCASH	Pd 02 Communionations	50.00	02 Communionations	Carol Nolan
29 Oct 2014	Carol Nolan	CLIENT	Pd Brady & Co	1,000.00	Brady & Co	Carol Nolan

3. To view the request, double click on the required line.

How to Edit a Cheque Request

1. View **My Cheques** as described above.
2. Select the cheque you want to edit.
3. Click **Edit** on the Home tab.
4. Make the required changes.
5. Click **OK** to save the changes or **Release** to save the changes and send to Accounts.

How to Delete a Cheque Request

1. View **My Cheques** as described above.
2. Select the cheque you want to delete.
3. Click **Delete** on the Home tab.

How to Release a Cheque Request

1. View **My Cheques** as described above.
2. **Double click on** the cheque you want to release.
3. Click on the **Release** button at the bottom right of the Cheque Request dialogue box.

How to view the A/C Ledger

1. View **My Cheques** as described above.
2. Click on the **A/c Ledger** icon on the Home tab. The accounts ledger will be displayed.



Case: BLA001/0001

Gordon T. Black

RTA Walkinstown Crossroads, G. Black

Tel: 01 4766666

F/e: BS

Search

Date	Ref	Narrative	Billing A/c	Outlay A/c	Client Current	Deposit A/c
12 May 2011	pc	Stephen Keogh Senior Counsel Fees		3,230.00		
30 Apr 2010	pc	Pd Commissioner for Oaths		55.00		
30 Mar 2010	pc	Pd Swearing fees		24.00		
02 May 2012	Ld	Lodged fees	(73,800.00)			
18 Apr 2012	Inv 321	Invoice: Fees:60000 Outlay:0 VAT:13800	73,800.00			
19 Jun 2010	5887	Pd Mr Gordon T Black settlement less fees as agreed			12,548.00	
20 Oct 2011	509818	Pd cLIENT			2,036.72	
30 Jul 2010	500178	Pd Gordon T Black balance due to client			375.30	
24 Apr 2010	2390	Pd Dr Simon Young Medical Report		250.00		
15 Mar 2010	2266	Pd PIAB		50.00		
12 May 2011	218	Invoice: Fees:635 Outlay:379 VAT:133.35	1,147.35			
12 May 2011	218	To Invoice 218		(55.00)		
12 May 2011	218	To Invoice 218		(250.00)		
12 May 2011	218	To Invoice 218		(24.00)		
12 May 2011	218	To Invoice 218		(50.00)		
30 May 2010	1739	Lodged settlement agreed			(13,750.00)	
10 Jun 2010	1654	Lodged on a/c fees & vat			(1,210.00)	
20 Oct 2011	123456	Lodged part payment on a/c	(1,000.00)			
26 Oct 2011	1234545	Bill from Airticity		106.61		
07 Aug 2015		FNI: 500.00 Gordon T. BL... Fees: 500.00 Outlay: 0.00 Vat: 0.00				
Client A/c Reserve			147.35	3,336.61	0.02	0.00

Chapter 12: The Debt Ledger

How to View the Debt Ledger

1. **Open** a case in the **Case Diary**.
2. Click on **Debt Ledger** in the **Case diary** navigation panel. The Debt Ledger will be displayed.

How to add the original debt

1. **Open** a debt case in the **Case Diary**.
2. Click on **Debt Ledger** on the **Case diary** navigation panel. The following screen will appear.

Case: IB5001/0008 Interim Business Services Ltd Tel: 01-6677889
International Business Services Ltd - Stephen Keogh F/e: BS

Original Debt Amount 50,000.00 Total Collected To-date 5,600.00 Post Payment

Interest To-date 2,652.05 Post Interest

Recoverable Cost To-date 60.00 Post Costs

Outstanding 47,112.05

Matter Code	Date	Description	Method	Type	Payment	Principal Paid	Interest Paid	Cost Paid	Interest Due	Cost Due	Remitted	Held Date	Posting Ref	Reference
IB5001/0008	26 Aug 2008	Court fees		Costs	0.00	0.00				60.00				14
IB5001/0008	26 Aug 2008	Interest on 50,000.00 at 2...		Interest	0.00	0.00			2,652.05	0.00				15
IB5001/0008	26 Aug 2008		Cheque	Receipt	5,000.00	5,000.00			0.00	0.00		09 Sep 2008		16
IB5001/0008	26 Aug 2008		Cheque	Receipt	600.00	600.00			0.00	0.00		09 Sep 2008		19

3. **Input** the Original Debt amount.
4. Click the check mark under the amount to  confirm.

Note the **Balance of Debt** will update automatically as postings are made.

How to Post a Payment

1. Click on **Debt Ledger** on the **Case diary** navigation panel.
2. Click **Post Payment**.

Original Debt Amount	50,000.00	Total Collected To-date	5,600.00	Post Payment
Interest To-date	2,652.05	Post Interest		
Recoverable Cost To-date	60.00	Post Costs		
			Outstanding	47,112.05

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

The screenshot shows a 'Post payment' dialog box with the following fields and values:

Field	Value
Matter Code	IBS001/0001
Date	15 Nov 2014
Reference	1425
Type	Direct Payment
Payment Method	Cheque
Value	305.00
Principal Paid	250.00
Principal Status	Part Payment
Costs Paid	50.00
Costs Status	Part Payment
Interest Paid	5.00
Interest Status	Part Payment
Description Paid	3 of 5 payments

- Date** The date will default to today's date; amend if required.
- Reference** **Input** a reference.
- Type** Select the **payment type** from the drop-down list.
- Payment Method** Select the **payment method** from the drop-down list.
- Value** **Input** the amount of the payment.
- Principal Paid** **Input** the amount of the payment to be allocated to the principal.
- Principal Status** Select the **Principal Status** applicable from the drop-down list.
- Costs Paid** **Input** the amount of the payment to be allocated to costs.
- Costs Status** Select the **Cost Status** applicable from the drop-down list.
- Interest Paid** **Input** the amount of the payment to be allocated to interest.
- Interest Status** Select a status from the drop-down list.
- Description** **Input** a description for this payment.

3. Click **OK** to post the payment. The debt balance will update.

How to Post Costs

1. Click on **Debt Ledger** on the **Case diary** navigation panel.
2. Click on **Post Costs**.

Post Costs

Matter Code IBS001/0001

Date 15 Nov 2014 ☐ Charge cost to Client

Costs 100.00 Client Charge 50.00

Description fees

Save Cancel

3. Input the following information on the Post Costs dialogue box

- Date The date will default to today's date amend if required.
- Costs Input an amount for the cost or select from the drop-down list.
- Description **Input** a description of the cost.
- Charge cost to Client Check the box if the cost is chargeable to the client
- Client Charge **Input** the amount of the cost chargeable to the client.

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

How to Post Interest

1. Click on **Post Interest**.

Post Interest

Calculate interest based on the following

Monthly rate at 5.00% from 11 Dec 2013 to 15 Nov 2014 on 17000.00

Calculate Interest 96.05

Save Cancel

2. Input the following information on the **Post Interest** dialogue box:

- Term Select Monthly, Yearly etc. from the drop-down list.
- Rate at **Input** the rate of interest
- From **Input** the start date or click the down arrow to select from the calendar.

- To **Input** the end date or click the down arrow to select from the calendar.
- On **Input** the amount on which the interest is to be calculated.

 **Note:** Once the information is provided the interest will calculate automatically and will then be displayed in the Calculated Interest box.

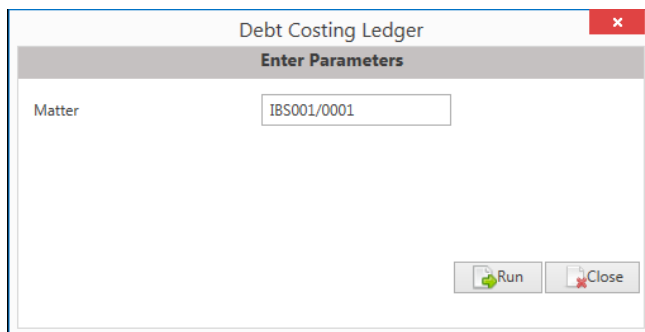
- Click **Save** to post the interest and the balance will automatically update.

How to Amend an Entry

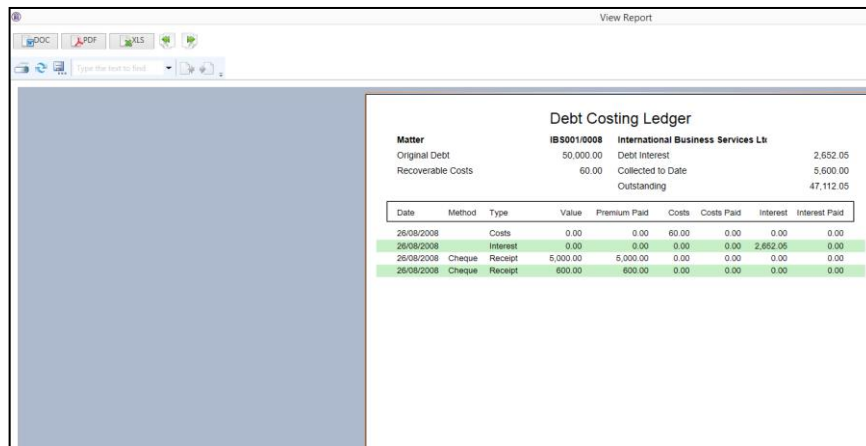
- Click **Debt Ledger** on the **Case diary** navigation panel.
- Double click on the entry you want to amend.
- Amend as required and click **Save** to post the change.

How to Print a Debt Ledger Report

- Click on **Debt Ledger** on the **Case diary** navigation panel.
- Click on **Print** on the Home tab. The following dialogue box will appear.



- Click on the Run Button a report will be generated see the following example.



Debt Costing Ledger								
Matter		IBS001/0008		International Business Services Ltd				
Original Debt		50,000.00		Debt Interest		2,652.05		
Recoverable Costs		60.00		Collected to Date		5,600.00		
				Outstanding		47,112.05		
Date	Method	Type	Value	Premium Paid	Costs	Costs Paid	Interest	Interest Paid
25/08/2008		Costs	0.00	0.00	60.00	0.00	0.00	0.00
25/08/2008		Interest	0.00	0.00	0.00	0.00	2,652.05	0.00
25/08/2008	Cheque	Receipt	5,000.00	5,000.00	0.00	0.00	0.00	0.00
25/08/2008	Cheque	Receipt	600.00	600.00	0.00	0.00	0.00	0.00

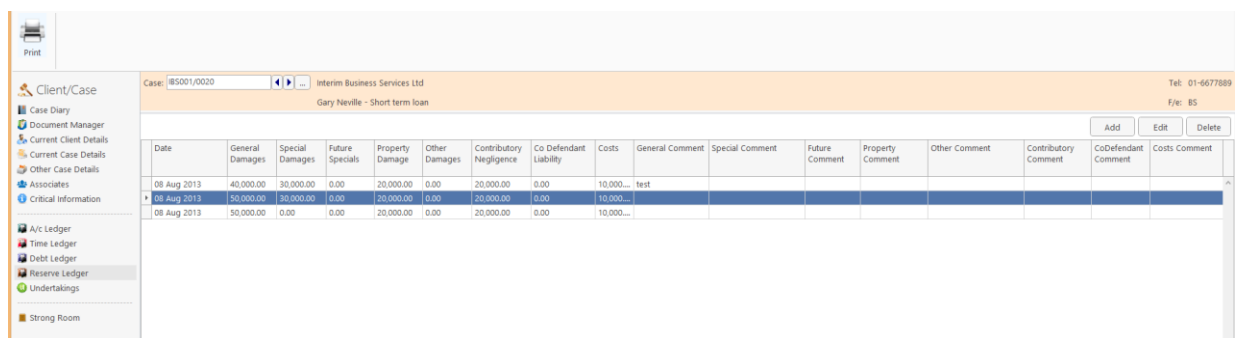
- Click **Print** on the Report Toolbar to send the report to the printer.

Chapter 13: The Reserve Ledger

The reserve ledger is used in litigation and medical negligence cases to make provision for awards of damages.

How to View the Reserve Ledger

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

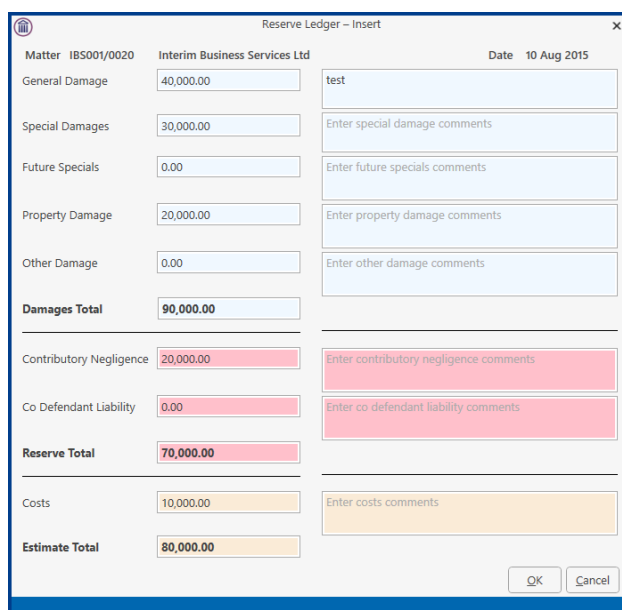


The screenshot shows the 'Reserve Ledger' window for Case: IBS001/0020, Interim Business Services Ltd. The table displays the following data:

Date	General Damages	Special Damages	Future Specials	Property Damage	Other Damages	Contributory Negligence	Co Defendant Liability	Costs	General Comment	Special Comment	Future Comment	Property Comment	Other Comment	Contributory Comment	CoDefendant Comment	Costs Comment
08 Aug 2013	40,000.00	30,000.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000.00	test							
08 Aug 2013	50,000.00	30,000.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000.00								
08 Aug 2013	50,000.00	0.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000.00								

How to Add an Entry

1. Click on **Reserve Ledger** on the **Case diary** Navigation panel.
2. Click **Add** on the Home tab. The **Reserve Ledger — Insert** dialogue box will appear.



The 'Reserve Ledger - Insert' dialogue box shows the following fields and values:

Matter	IBS001/0020	Interim Business Services Ltd	Date	10 Aug 2015
General Damage	40,000.00	test		
Special Damages	30,000.00	Enter special damage comments		
Future Specials	0.00	Enter future specials comments		
Property Damage	20,000.00	Enter property damage comments		
Other Damage	0.00	Enter other damage comments		
Damages Total	90,000.00			
Contributory Negligence	20,000.00	Enter contributory negligence comments		
Co Defendant Liability	0.00	Enter co defendant liability comments		
Reserve Total	70,000.00			
Costs	10,000.00	Enter costs comments		
Estimate Total	80,000.00			

Buttons: OK, Cancel

Input an estimated amount and description for each of the following that applies:

General Damages
Special Damages
Future Specials
Property Damage
Other Damage

Next, estimate, and input a description for, the following, which are expected to reduce the client's liability.

Contributory Negligence
Co Defendant Liability

Finally, input an estimate of the Costs.

The **Damages Total**, **Reserve Total** (Damages Total less Contributory Negligence and Co-Defendant Liability) and **Estimate Total** (Reserve Total plus Costs) will be calculated automatically.

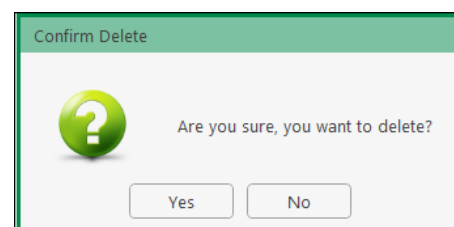
3. Click **OK** to add the entry.

How to Edit an Entry

1. Click **Reserve Ledger** on the **Case diary** Navigation panel.
2. Select the **entry** you want to edit, then click **Edit** on the Home tab. The **Reserve Ledger — Insert** dialogue box (see above) will appear.
3. Make the required changes.
4. Click **OK** to save the changes.

How to Delete an Entry

1. Click **Reserve Ledger** on the **Case diary** Navigation panel.
2. Select the **entry** you want to delete, then click **Delete** on the Home tab.
3. You will be asked to confirm the deletion.
4. Click **Yes** to confirm.



How to Print the Reserve Ledger

1. Click **Reserve Ledger** on the **Case diary** Navigation panel.
2. Click **Print** on the Home tab.
3. A report will run; to print the report, click the Print icon on the report toolbar.

Chapter 14: Phone Log

Viewing, Searching and Sorting the Phone Log

How to view the Phone Log

1. Click on **Search/Open** on the Navigation bar.
2. Click **Phone Log** on the Navigation panel.

Case Code	Date	Name	Who	Message	Description
TJF001/0001	06 Jul 2015	TJ Fox	AM	Caller: PTSB - Branch Manager Branch Manager called to say a payment was rece...	Outstanding debt to PTSB Bank.
TJF001/0001	06 Jul 2015	TJ Fox	CN	Spoke with solicitors for the Building Society to try and arrange a payment plan. T...	Outstanding debt to PTSB Bank.
BRE001/0001	03 Jul 2015	Mike Breeze	CN	Caller: Mike Breeze Wants to discuss settlement options with Defendant. Wants to...	Broken left leg
FLY001/0002	03 Jul 2015	Jack Flynn	CN	Caller: James Bay Draft Contracts are ready for review.	Purchase of 16 The Haystack, Terenure, Dublin 6
SN001/0001	02 Jul 2015	Bart Simpson	CN	Called client to remind him to send back the papers	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6
FLY001/0001	02 Jul 2015	Jack Flynn	CN	Called client to remind him to send back the papers	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6
BE5001/0002	03 Feb 2015	Business Time Limited	BS	Phone Call	Shareholding Agreement
BE5001/0001	03 Dec 2014	Business Time Limited	BS	Phone Call to Harold Worth	Lease of Unit 33, Eastgate Avenue, Dublin 12.
NOL001/0001	04 Sep 2014	Paula Nolan	CN	test test test	Paula Nolan V Joe Smith
AB8001/0001	08 Aug 2014	George J Abbott	MK	Telcon with etc etc	Sale 45 Somerset Road, Dublin 6
AI0001/0004	29 May 2014	Allied Investment Group	BS	Sean enquired about third party cover. I informed him that the customer had com...	Mark Twain -> Hoover Services
AI0001/0003	29 May 2014	Allied Investment Group	BS	Frank phoned Claims team to follow up on file details	Zara Kennedy -> Carl Indigo
AI0001/0002	27 May 2014	Allied Investment Group	BS	Alan phoned regarding uncompleted claims form	Garry Barlow -> Hired Talent Services
BE0001/0006	20 May 2014	Angela Beck	BS	Phone lender for redemption statement - Any note	14 Windy Arbor, Surbiton, Surrey SU1 2HW
DI0001/0001	19 May 2014	Paul Duggan	BS	Phone buyers' solicitors, check buyers' full names	21 Clonard Village, Chiswick, London W5 3HN
BL0001/0001	19 May 2014	David Bloggs	BS	Phone lender for redemption statement	6 Hill Street, Cork, Surrey ST56 6Y
DUG001/0001	09 May 2014	Paul Duggan	BS	Phone buyers' solicitors, check buyers' full names	21 Clonard Village, Chiswick, London W5 3HN
DUG001/0001	07 May 2014	Paul Duggan	BS	Phone lender for redemption statement	21 Clonard Village, Chiswick, London W5 3HN
AI0001/0001	29 Apr 2014	Allied Investment Group	BS	Phone Call to discuss potential damages and costs.	Noel Brown -> Jones Services Ltd
AB8002/0001	27 Mar 2014	Abbie Lynch	BS	Type in here any conversation details Call from: Abbie Lynch Phone No: +353-87-8...	Commercial Lease - 5 Main Street, Donnybrook.
FLY001/0002	23 Mar 2014	Jack Flynn	CN	Phone Call from Jack Flynn re: the H... & Sol...	Commercial Lease - 5 Main Street, Donnybrook.

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



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

Search the Phone Log

1. Open the Phone Log.
2. Click in the search box.
3. Input the search terms.
4. To clear the search, click the Clear button to the right of the search box.



How to Sort the Phone Log

1. Open the Phone Log.
2. To Sort by column click on a column heading, e.g. Name.
3. To clear the sort right, right-click on the column heading and select **Clear Sorting** from the pop-up menu.

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

How to Filter the Phone Log

1. Open the Phone Log
2. To filter move your mouse over the column heading until a pin appears.

Search					
	Case Code	Date	Name	Who	Message
✓	TJF001/0001	06 Jul 2015	TJ Fox		Caller: PTSB - Branch Manager Branch Manager called t
✓	TJF001/0001	06 Jul 2015	TJ Fox		Spoke with solicitors for the Building Society to try and
✓	BRE001/0001	03 Jul 2015	Mike		Caller: Mike Breeze Wants to discuss settlement options
✓	FLY001/0002	03 Jul 2015	Jack F		Caller: James Bay Draft Contracts are ready for review.
✓	FLY001/0001	02 Jul 2015	Jack F		Called client to remind him to send back the papers
	SIM001/0001	02 Jul 2015	Bart S		Called client to remind him to send back the papers
	BES001/0002	03 Feb 2015	Angela Beck		Phone Call
✓	BES001/0001	03 Dec 2014	Busine		Phone Call to Harold Worth
✓	NOL001/0001	04 Sep 2014	Bill Clinton		test test test
✓	ABB001/0001	08 Aug 2014	Paula		Telcon with etc etc
✓	AIG001/0004	29 May 2014	Bob Murphy		Sean enquired about third party cover. I informed him t
✓	AIG001/0003	29 May 2014	Georg		Frank phoned Claims team to follow up on file details
✓	AIG001/0002	27 May 2014	Allied		Alan phoned regarding uncompleted claims form
✓	BEC001/0006	20 May 2014	Chow Ming Zhang		Phone lender for redemption statement - Any note
✓	DUG001/0001	19 May 2014	Claire Bourke		Phone buyers' solicitors, check buyers' full names
✓	BLO002/0001	19 May 2014	Angel		Phone lender for redemption statement
✓	DUG001/0001	09 May 2014	David		Phone buyers' solicitors, check buyers' full names
✓	DUG001/0001	07 May 2014	Paul Duggan	BS	Phone lender for redemption statement

3. Click on the pin to see a list of filter options click on the required filter.
4. To clear the filter, select **(All)** from the filter drop-down menu (alternatively, right-click the column heading and select **Clear Filter** from the pop-up menu).

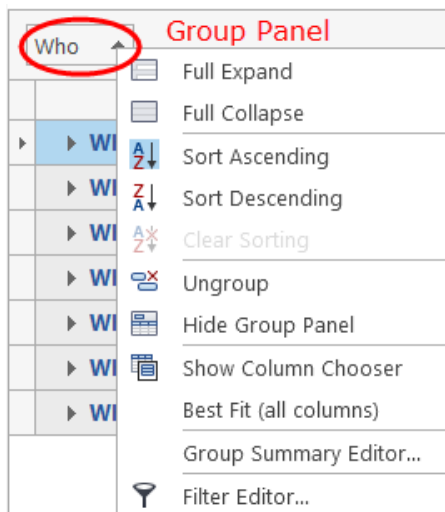
How to Group column headings in the Phone Log

1. Open the Phone Log.
2. Right-click on a column heading to see the pop-up menu.
3. Select **Group By This Column** from the menu. The following example shows the results.

	Case Code	Name	Date	Message
▶	Who: AM			
▶	Who: BS			
▶	Who: CN			
▲	Who: JP			
✓	BOU001/0001	Claire Bourke	24 Oct 2010	Telephone Attendance
✓	BOU001/0001	Claire Bourke	17 Jul 2010	Telephone Attendance
✓	SMI001/0001	Smith & Green	20 Jan 2011	Caller: john smith - harry rang re contracts
▶	Who: MK			
▶	Who: MW			
▶	Who: SK			

4. To remove the grouping, if the Group Panel is hidden, right-click on a column heading and select **Show Group Panel** from the pop-up menu.

- When the **Group Panel** is shown, right-click on the column name in the Group Panel.



- Select **Ungroup** from the pop-up menu.

How to add a phone message

- Open** the phone log.
- Click **Add** on the Phone Log tab.

Input the following details on the Add Phone Log dialogue box:

- | | |
|-----------|---|
| Case Code | By default this will be ZZZZZZ/ZZZZ, which is used for messages that are not connected with a case. To select a case click on the browse button and search for the required case. |
| Date/Time | This will show the current date and time; amend if required. |

Priority	Select the priority of the message (High, Normal or Low).
Who	Who is the message for. You may select from the drop-down list.
Notify	To notify somebody else, in addition to the addressee of the message, select from the drop-down list.
Caller	Input the caller's name.
Message	Input the message.
Answered	Check this box only when the message has been answered; when it is checked, the message will not appear in the addressee's task list.

3. Click **OK**. The message will appear in the selected person's task list.
4. To send an email click **Send Email**.

How to edit a phone message

1. In the phone log, select the message you want to amend.
2. Click **Edit** on the Phone Log tab.

Change Phone Log (1880)

Case: KEL002/0002 ... Sarah Kelly
Debt Collection

Date: 21 May 2014 14:41

Priority: ☐ High ☒ Normal ☐ Low

Who: Carol Nolan

Notify: Please Select Group

Caller: Louise ☐ Answered

Message

Caller: Louise
- Pls call urgent

Send Email Ok Cancel

3. Amend as required.
4. Click **OK** to save the changes.

How to delete a phone message

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

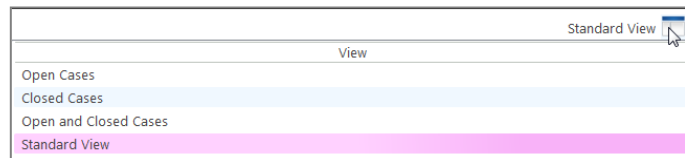
Note: If you delete a message it will be removed from the system completely.

Chapter 15: Closed Cases

How to Search for Closed Cases

1. Click on **Search/Open** on the Navigation panel.
2. Select **All Matters** on the Navigation panel.

3. Click the **View** icon on the right of the window. The Standard View is shown by default.



4. Select the required View
 - **Closed Cases** to search only closed cases
 - **Open Cases** to search only open cases.
 - **Open and Closed Cases** to search both lists.
5. Input a search term in the search box; the search will update as you type.

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

1. Search for the closed case as described above.
2. Double click the required case to view the Case Diary.
3. Click on **A/C Ledger** on the Navigation panel to view the archived ledger.

 Note no amendments can be made in the Case Diary unless the case is reopened.

How to reopen a closed case

1. Search for the closed case as described above.
2. Double click to open in the case diary.
3. Click on **Current Case Details** on the Navigation panel, to see the Current Case Details screen.
4. Select the **Archive Tab** in Current Case Details.
5. Uncheck the box marked **Closed**. The case is now reopened.

How to close a Case

Before archiving a matter ensure that all balances are nil, all time is posted to the time ledger and all tasks in the case diary are marked as complete.

1. Click on **Search/Open** on the Navigation panel.
2. Select **All Matters** on the Navigation panel.
3. **Search** for the case in the normal way.
4. **Double click** to open in the Case Diary.
5. Click on **Current Case Details** on the Navigation panel, to view the Current Case Details screen.

Current Case Details

Client Code: FLY001 Description: Purchase of 16 The Haywain, Terenure, Dublin 6
Matter: 0002

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

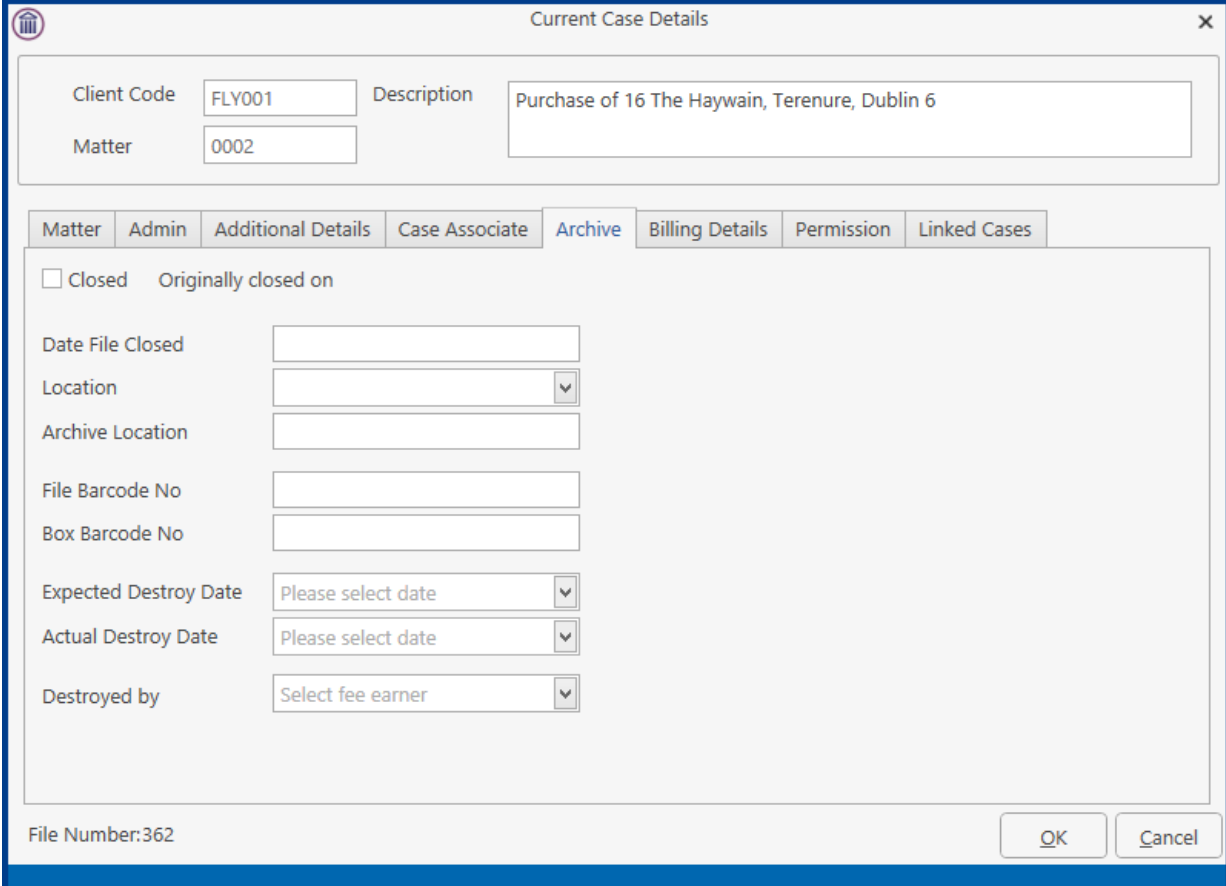
Fee Earner: Carol Nolan File Ref: FLY002/001
Secretary: Anne Mellon Enter
Partner: Stephen Keogh Enter
Department: Conveyancing Enter
Work Type: Purchase ☐ Mark as Important ☐ Statement
Old Reference: FLY001/001 Branch: Dublin Office

Case Plan & Status

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

File Number: 362 OK Cancel

6. Select the **Archive Tab**.
7. Check the box marked **Closed**.



The 'Current Case Details' window displays the following information:

- Client Code:** FLY001
- Description:** Purchase of 16 The Haywain, Terenure, Dublin 6
- Matter:** 0002

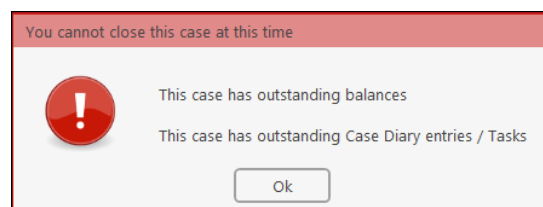
Navigation tabs include: Matter, Admin, Additional Details, Case Associate, **Archive**, Billing Details, Permission, and Linked Cases.

Under the 'Archive' tab, there is a checkbox for 'Closed' and a label 'Originally closed on'. Below this are several input fields and dropdown menus:

- Date File Closed
- Location (dropdown)
- Archive Location
- File Barcode No
- Box Barcode No
- Expected Destroy Date (dropdown: Please select date)
- Actual Destroy Date (dropdown: Please select date)
- Destroyed by (dropdown: Select fee earner)

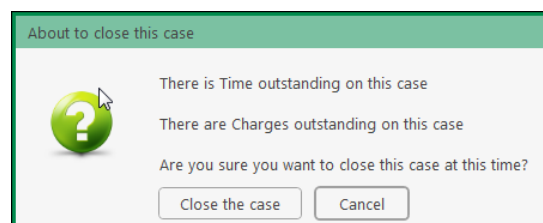
At the bottom left, it says 'File Number:362'. At the bottom right are 'OK' and 'Cancel' buttons.

8. If the case cannot be closed because there are uncompleted tasks or there is an account balance, a warning message will be displayed, giving the reason why the case cannot be closed.



Or

If there is unposted time or there are charges outstanding, an alert message will be displayed. In this case, you may proceed with the closure of the case or **Cancel** it.

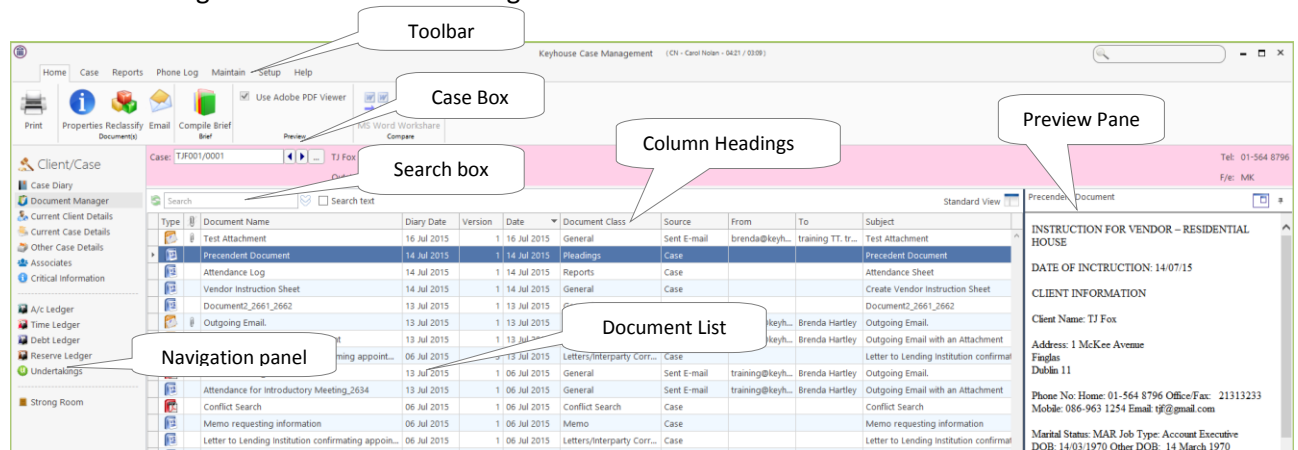


Chapter 16: Using the Document Manager and Brief Wizard

Document Manager

Getting around Document Manager

Below is an image of the Document manager window.

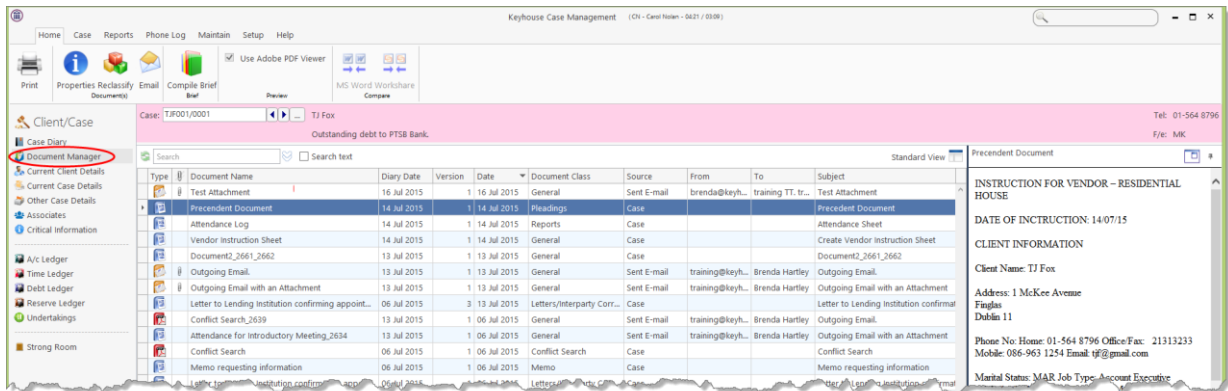


Window area	Description
Case Box	Input the case reference in this box or click the ... browse button and search for the required case.
Column Headings	Click the column headings to sort the list of documents by name, version, diary date, document date, document class, Source, From, To, Subject.
Document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

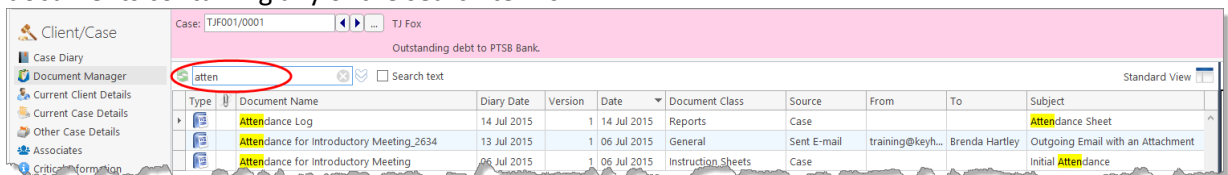
Home tab	Description
	Print
	Show document properties
	Reclassify: change the document class
	Click to email current document
	Compile Brief: If no Brief currently exists, this button launches the Brief Wizard . If there is an existing Brief, this button opens the existing Brief in the Brief Maintenance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

How to search the Document Manager

1. **Open** a case in the case diary.
2. Click **Document Manager** on the Navigation panel. All the attachments in the case will be listed.



3. **Input** the search terms in the **Search** box. The search results will update in real time, showing all documents containing any of the search terms.



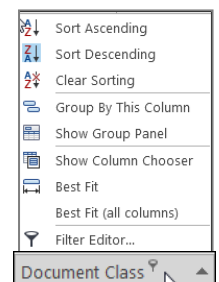
4. **Select** a document to see a preview. **Double click** to the open the document.

How to Sort by Column Heading

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

Case: TJF001/0001 TJ Fox									
Outstanding debt to PTSB Bank.									
Search text									
Type	Document Name	Diary Date	Version	Date	Document Class	Source	From	To	Subject
	Test Attachment	16 Jul 2015	1	16 Jul 2015	General	Sent E-mail	brenda@keyh...	training TT. tr...	Test Attachment
	Precedent Document	14 Jul 2015	1	14 Jul 2015	Pleadings	Case			Precedent Document
	Attendance Log	14 Jul 2015	1	14 Jul 2015	Reports	Case			Attendance Sheet
	Vendor Instruction Sheet	14 Jul 2015	1	14 Jul 2015	General	Case			Create Vendor Instruction Sheet
	Document2_2661_2662	13 Jul 2015	1	13 Jul 2015	General	Case			Document2_2661_2662
	Outgoing Email	13 Jul 2015	1	13 Jul 2015	General	Sent E-mail	training@keyh...	Brenda Hartley	Outgoing Email
	Outgoing Email with an Attachment	13 Jul 2015	1	13 Jul 2015	General	Sent E-mail	training@keyh...	Brenda Hartley	Outgoing Email with an Attachment
	Letter to Lending Institution confirming appoint...	06 Jul 2015	3	13 Jul 2015	Letters/Interparty Corr...	Case			Letter to Lending Institution confirmat
	Conflict Search_2639	13 Jul 2015	1	06 Jul 2015	General	Sent E-mail	training@keyh...	Brenda Hartley	Outgoing Email
	Attendance for Introductory Meeting_2634	13 Jul 2015	1	06 Jul 2015	General	Sent E-mail	training@keyh...	Brenda Hartley	Outgoing Email with an Attachment

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



How to Filter Columns

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

Search ☐ Search text

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

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

How to Group by Column

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

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

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

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

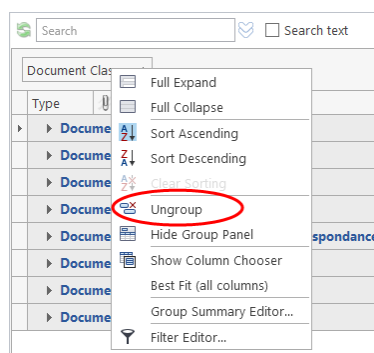
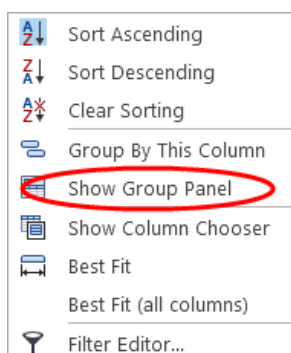
Type	Document Name	Version	Diary Date	Date	Source	From	To	Subject
▶ Document Class: Attendance Sheet								
▶ Document Class: Letters/Interparty Correspondance								
	Letter to Client	1	20 Apr 2010	29 Jan 2011	Case			Letter to Client re advice
	Letter to Solicitor	1	24 Apr 2010	29 Jan 2011	Case		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

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

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



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

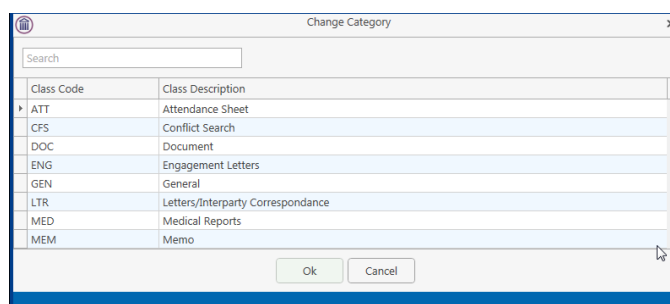


How to reclassify documents

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

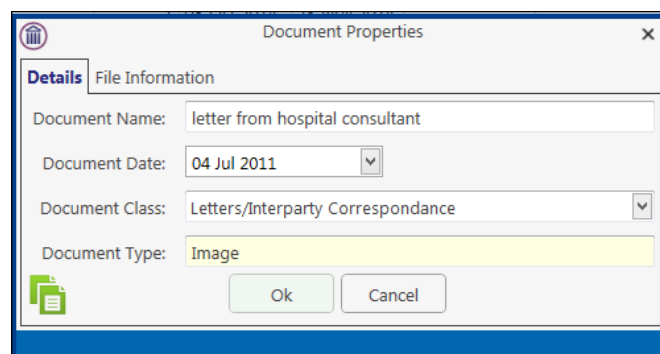
TIP: To select multiple documents: Hold down **CTRL** on your keyboard and click each of the documents to be selected.

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



How to change the Document Properties

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



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

How to email Document(s)

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

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

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

The Brief Wizard

This tool automates the task of generating a brief to counsel, saving you time. It amalgamates all the required documentation in chronological order into relevant sections, complete with a cover page, table of contents and pagination.

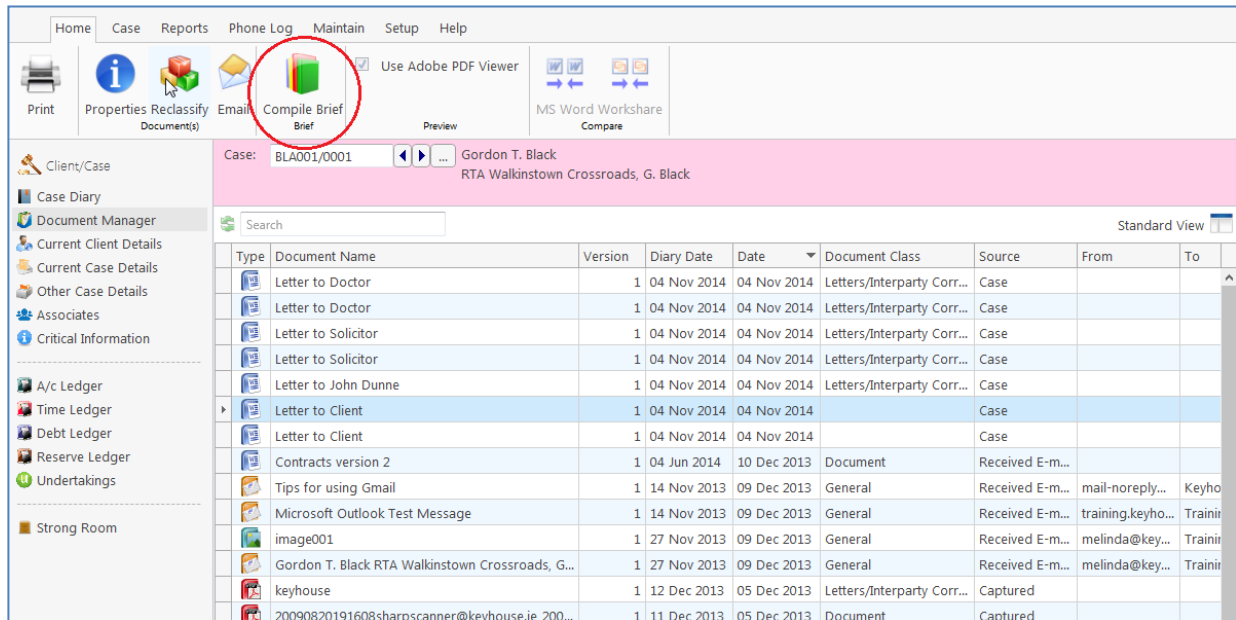
Important Steps for preparing your Brief

1. Review your documents in the **Document Manager** and ensure the necessary files are classified and the Document Date is correct as it will be in your brief.
2. If you cannot view or open a document from the Case Diary or Document Manager screen you will not be able to use this document in your brief.
3. Once you begin to generate your Brief you should not use your PC for any other purpose until the brief is completed. Several different programs will be used to generate the brief and running another program is likely to cause disruption to generation of the brief.
4. Please review the earlier part of this chapter (Document Manager, particularly p. 128 above) for details on how to rename and reclassify a document.

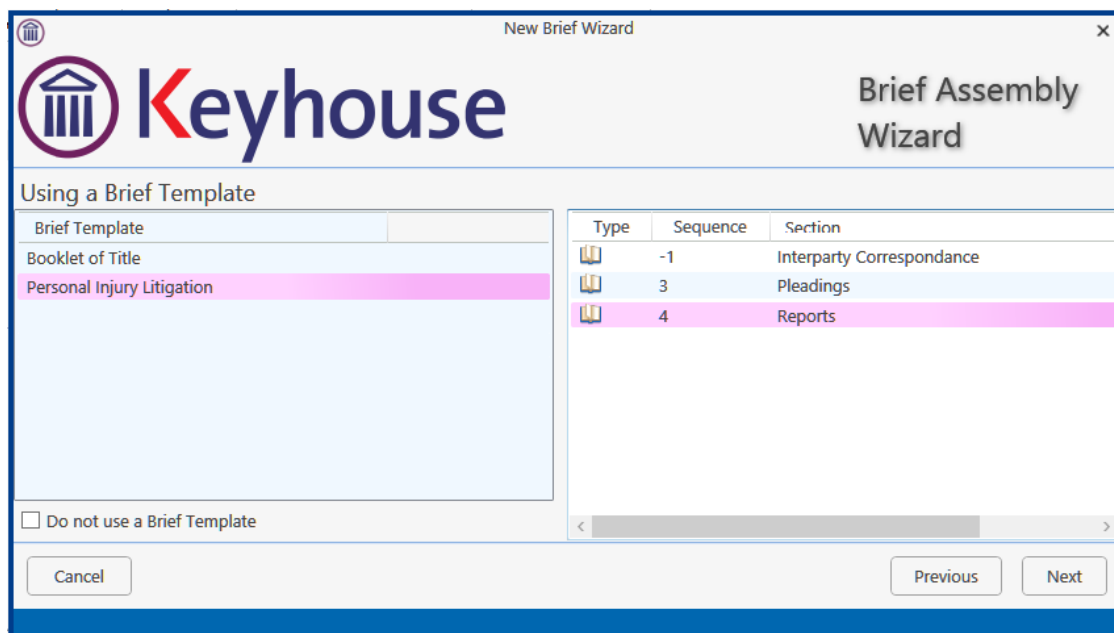
If you need assistance adding **Document Classes** please contact your Keyhouse administrator or casesupport@keyhouse.ie

Assembling a Brief

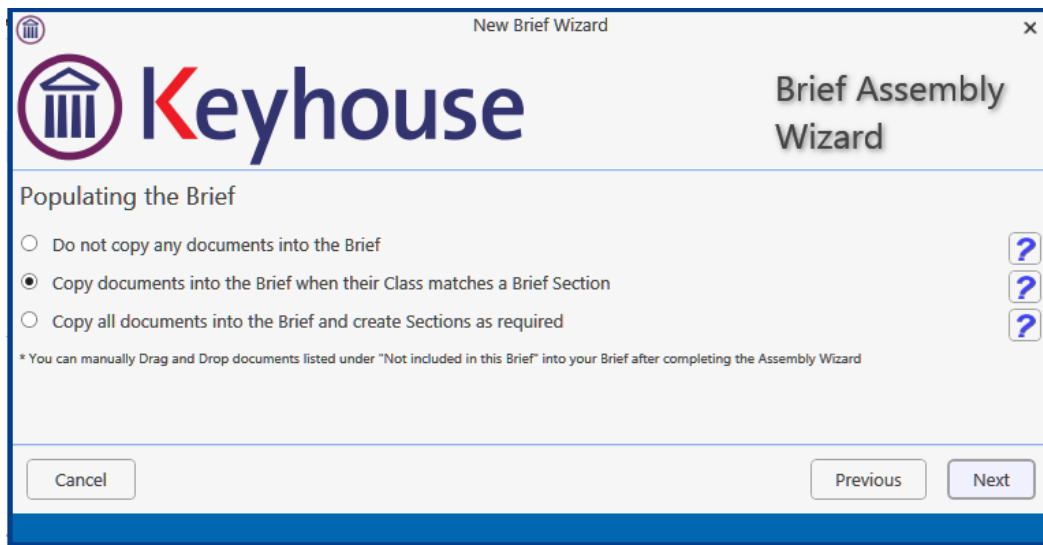
1. **Open** a case in the case diary.
2. Click **Document Manager** on the Navigation panel.



3. Click **Compile Brief** on the Document Manager Home tab.
4. The Brief Assembly Wizard will start with a welcome screen. Click **Next** to continue.
5. If Brief templates have been set up on the system, you may either select one or check **Do not use a Brief Template**.



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



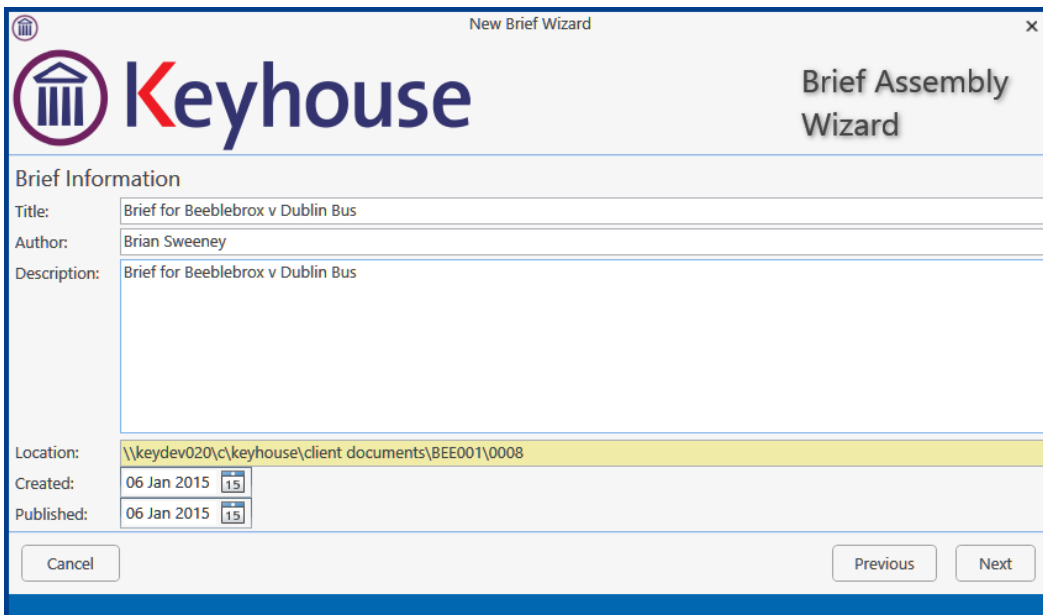
The screenshot shows the 'New Brief Wizard' dialog box with the 'Brief Assembly Wizard' title. The 'Populating the Brief' section contains three radio button options: 'Do not copy any documents into the Brief', 'Copy documents into the Brief when their Class matches a Brief Section' (which is selected),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

- **Do not copy any documents in the brief:** No documents will be added to the brief automatically but you will be able to drag and drop documents from the Section **Not included in this Brief** into the appropriate section.
- **Copy documents into the brief when their Class matches a brief section:** Any document whose Document Class matches a section of the Brief will automatically be copied into that section.
- **Copy all documents into the brief and create sections as required:** Sections will be created for each Document Class which applies.



Tip: for further information on each option click the question mark icon beside it.

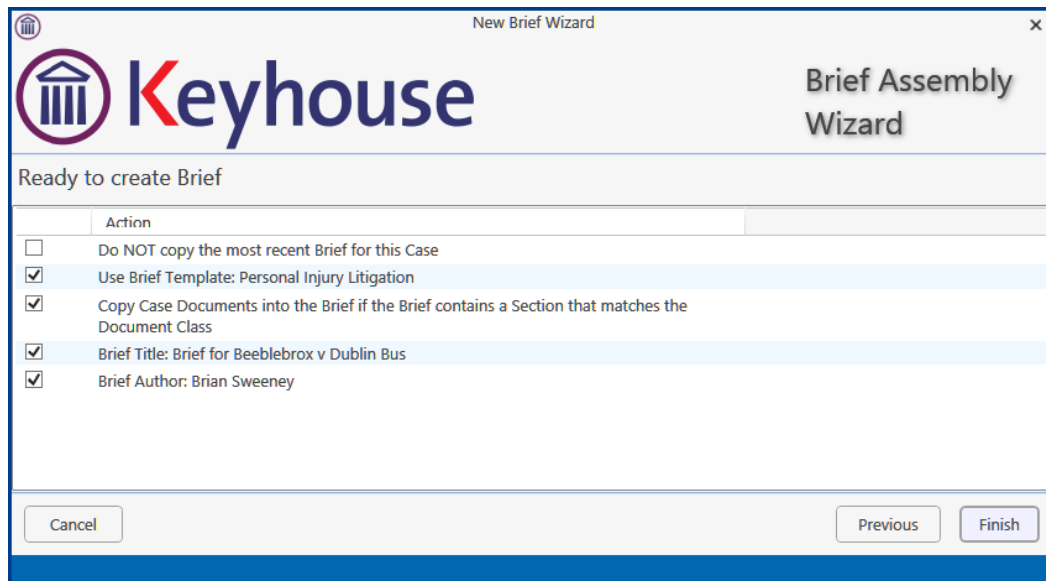
5. Click **Next** to continue to the **Brief Information** screen.



The screenshot shows the 'New Brief Wizard' dialog box with the 'Brief Assembly Wizard' title. The 'Brief Information' section contains a form with the following fields: 'Title' (Brief for Beeblebrox v Dublin Bus), 'Author' (Brian Sweeney), 'Description' (Brief for Beeblebrox v Dublin Bus), 'Location' (\\keydev020\\c\\keyhouse\\client documents\\BEE001\\0008), 'Created' (06 Jan 2015), and 'Published' (06 Jan 2015). At the bottom of the dialog are 'Cancel', 'Previous', and 'Next' buttons.

You may accept the default information or amend as required.

6. Click **Next** to continue to the final screen of the wizard, which will contain a summary of the options you have selected. You can make changes by checking and unchecking the boxes or click **Previous** to go back to an earlier screen.

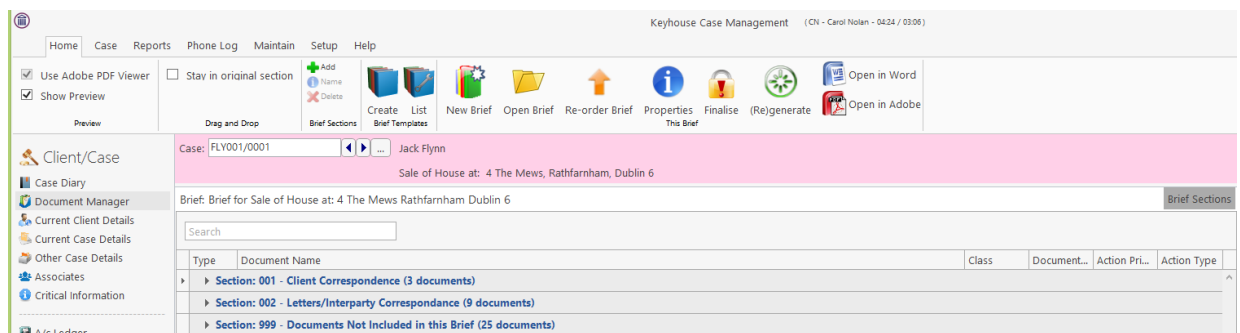


The 'New Brief Wizard' dialog box is titled 'New Brief Wizard' and 'Brief Assembly Wizard'. It features the Keyhouse logo. Below the title bar, it says 'Ready to create Brief'. There is a table with columns 'Action' and 'Status'. The table contains the following rows:

Action	Status
☐ Do NOT copy the most recent Brief for this Case	
☒ Use Brief Template: Personal Injury Litigation	
☒ Copy Case Documents into the Brief if the Brief contains a Section that matches the Document Class	
☒ Brief Title: Brief for Beeblebrox v Dublin Bus	
☒ Brief Author: Brian Sweeney	

At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Finish'.

7. When you are satisfied, click **Finish**.



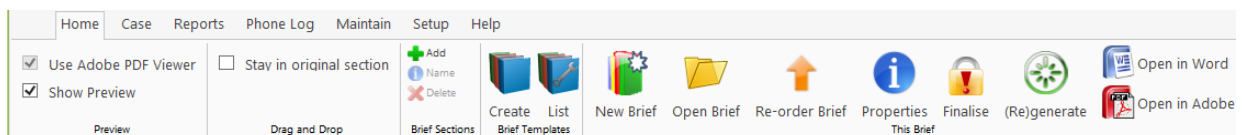
The 'Keyhouse Case Management' interface shows a sidebar with navigation options: Home, Case, Reports, Phone Log, Maintain, Setup, Help. The main area displays case details for 'Case: FLY001/0001' by 'Jack Flynn'. The case title is 'Sale of House at: 4 The Mews, Rathfarnham, Dublin 6'. Below this, the brief title is 'Brief: Brief for Sale of House at: 4 The Mews Rathfarnham Dublin 6'. A 'Brief Sections' table is shown with the following data:

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

8. The sections in the brief will be displayed.

Brief Home tab

The Home tab in the Brief:

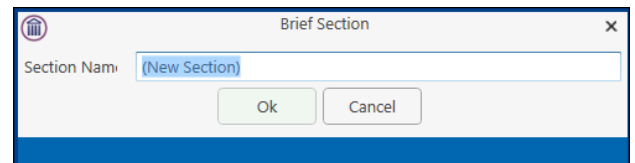


The 'Brief Home tab' interface shows a sidebar with navigation options: Home, Case, Reports, Phone Log, Maintain, Setup, Help. The main area displays a toolbar with various icons for document management. The 'Home' tab is selected. The toolbar includes icons for 'Use Adobe PDF Viewer', 'Show Preview', 'Stay in original section', 'Add Name', 'Delete', 'Create List Brief Templates', 'New Brief', 'Open Brief', 'Re-order Brief', 'Properties This Brief', 'Finalise', '(Re)generate', 'Open in Word', and 'Open in Adobe'.

Brief Sections

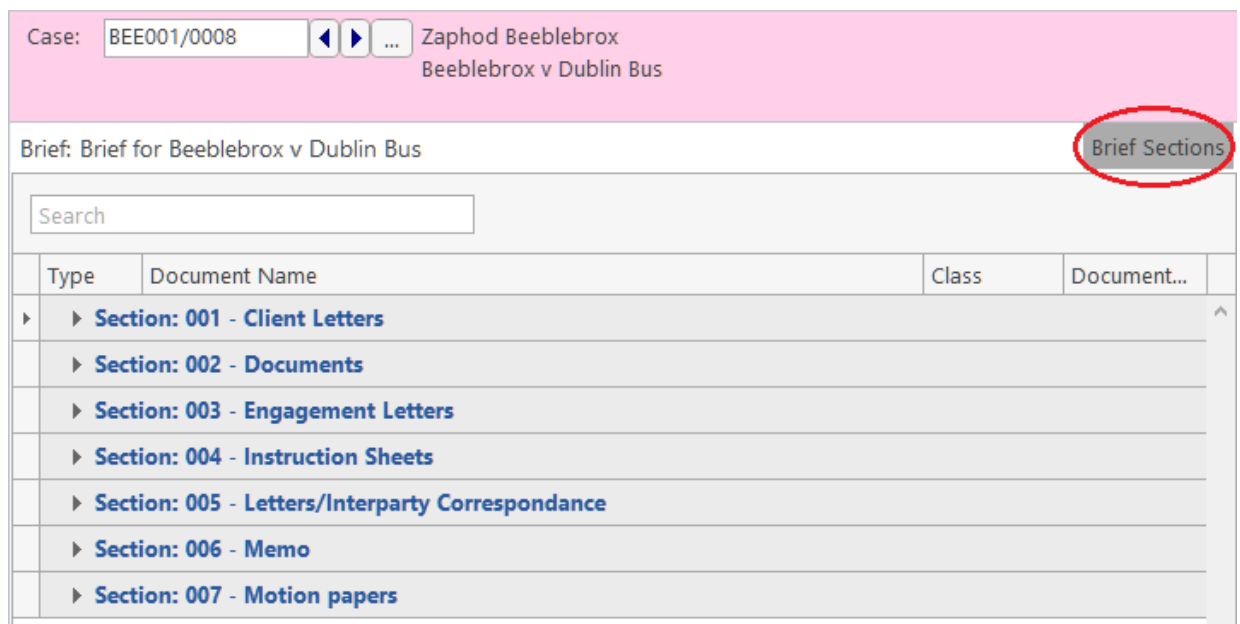
How to Add a Section

1. Click **Add** on the Home tab.
2. Name the new section.
3. Click **OK**.
4. The new section will appear in the **Section** list.



How to amend a Section Name

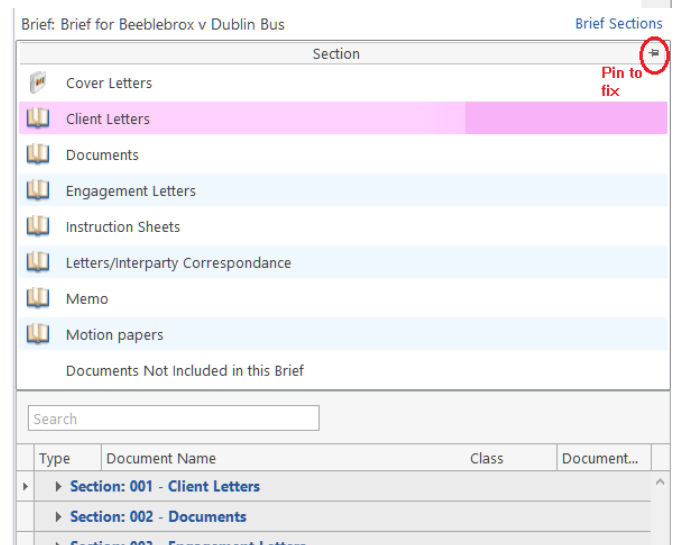
1. Click **Brief Sections** on the right of the brief screen



2. A list of sections will be expanded.

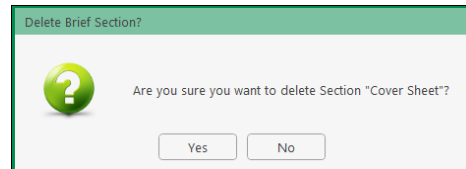
 **Tip:** To Show the list permanently click the pin.

3. Select the section you want to rename.
4. Click **Name** on the Home tab. Alternatively, right-click the section and choose **Section Name** from the pop-up menu.
5. Name the new section and click **OK** to confirm.



How to delete a Section

1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 132 above).
2. Select the **Section** you want to delete.
3. Click **Delete** on the Home tab. Alternatively, right-click the Section and choose **Delete Section** from the pop-up menu.
4. A message will ask you to confirm the deletion.
5. Click **Yes**.



How to change the order of Sections

1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 132 above)
2. Select the **section** you want to move.
3. Use the buttons in the **Move** section of the Home tab to change the position of the section in the brief.



Move the selected section **to the top** of the list of sections.

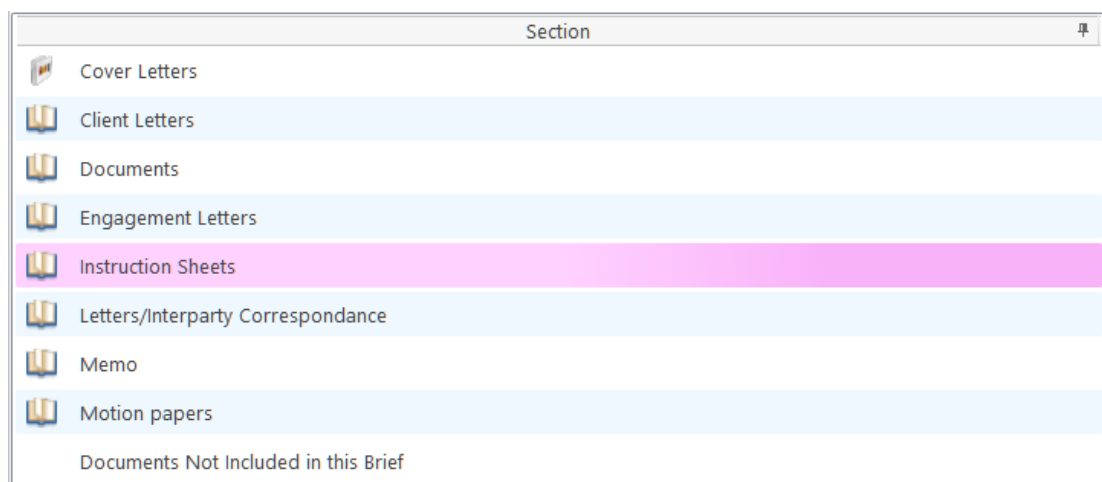
Move the selected section **up one position**.

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

Move the selected section **to the bottom** of the list.

How to Move a document to a different section

1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 132 above)
2. Pin the **Brief Sections** so that they remain visible.
3. In the lower part of the window open the section containing the document which you want to move, by clicking on the arrow to the left of the section.

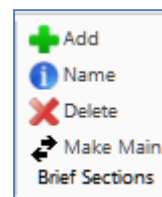


4. **Drag** the document to the upper part of the window and **drop** it into the required section. In the example above, one might select the document **Terms of Engagement** and drag it into **Instruction Sheets** (which is selected in the upper part of the window).

Search				
Type	Document Name	Class	Document...	
▶ Section: 001 - Client Letters				
▶ Section: 002 - Documents				
▶ Section: 003 - Engagement Letters				
	 Terms of Engagement	Engageme...	30 Sep 2014	
▶ Section: 004 - Instruction Sheets				
▶ Section: 005 - Letters/Interparty Correspondance				

How to flag as a Cover or Main

1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 132 above).
2. Select the section required.
3. If the section is already designated as a **Cover** section, Click **Make Main** on the Home tab to make it a **Main** section. This command toggles between **Make Main** and **Make Cover**, depending on how the selected section is designated.

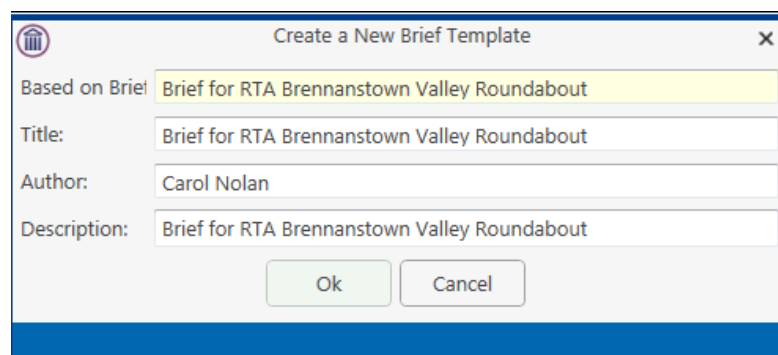


 **Main** sections are included in the Table of Contents; **Cover** sections are intended to contain cover letters and similar preliminary material.

Brief Options

Save current Brief as Template

1. Click **Create** on the **Brief Templates** section of the Home tab.
2. Edit the details in the dialogue box **Create a New Brief Template**



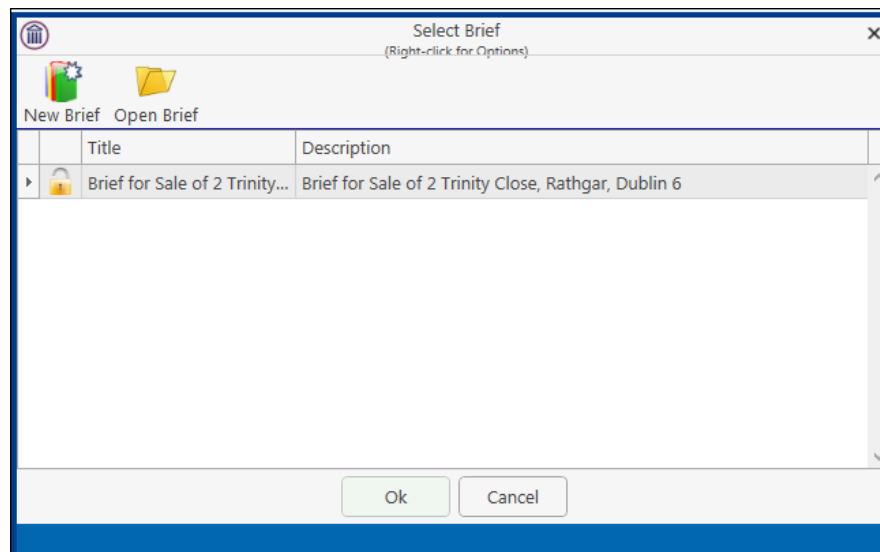
By default, the template title will be the same as the title of the Brief on which it is based. As it is to be

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

3. Click OK.

How to Open a Brief

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



4. Select the brief to open and click **Open Brief**.



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

Generate the Brief



Before you generate the Brief, if you have any Microsoft Office applications running (e.g. Word, Excel, Powerpoint etc), save your work and close the application(s).

FAILURE TO DO THIS MAY RESULT IN LOSS OF DATA.

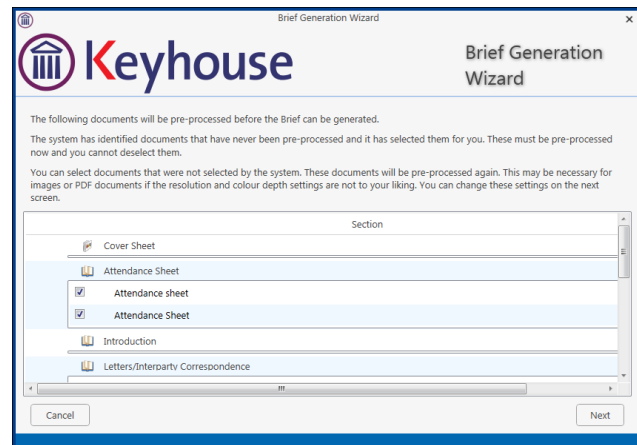


Once you begin to generate your Brief **you should not use your PC or laptop until the brief is completed**. Keyhouse calls on a number of programs during brief generation and trying to view/use another program will cause disruption to the brief.

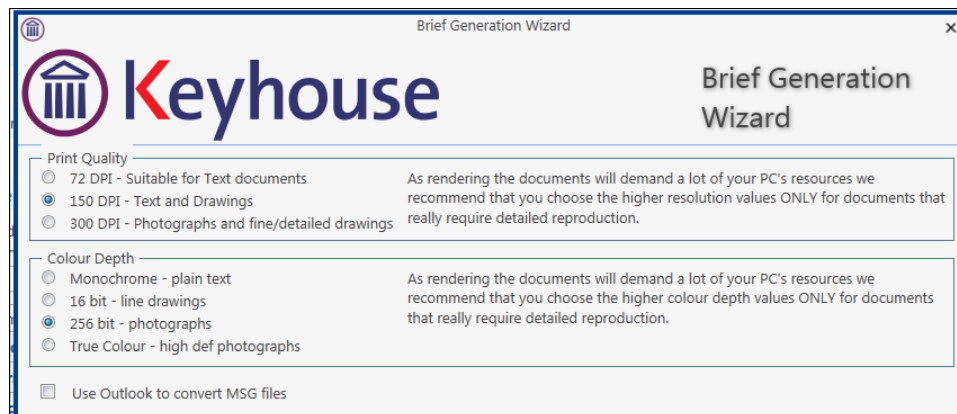
How to (Re) Generate a Brief

1. Click **(Re)Generate** on the Home tab.
2. The Brief Generation Wizard will start.

The system may select some documents for preprocessing and ask if you want to select others which have not automatically been selected. The automatically selected documents cannot be unselected but you may tag others for preprocessing by checking the box beside each.

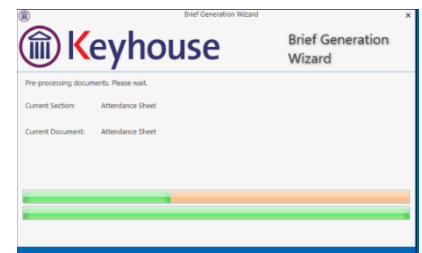


3. Click **Next**.
4. Select the **print quality** and **colour depth** required.

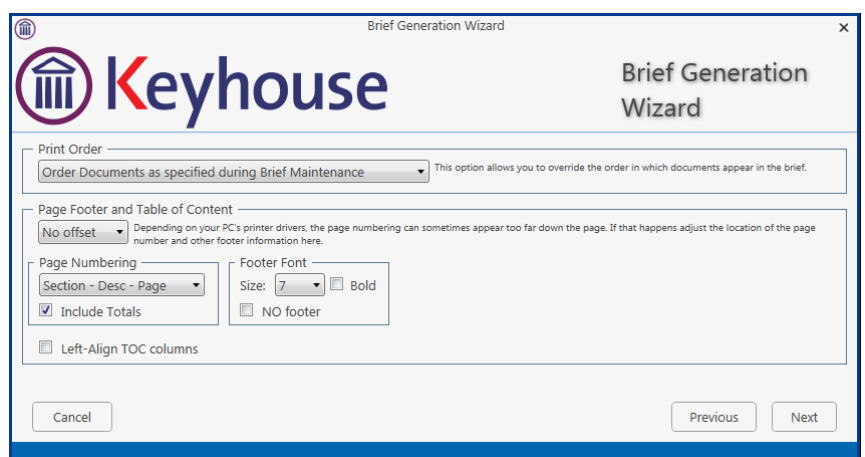


Check the box to use Outlook to convert MSG files.

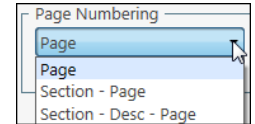
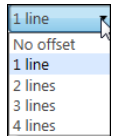
5. Click **Next**. A screen will show the progress of the document preprocessing.
6. When preprocessing has been completed, you will have the opportunity to set the print order of the brief, the contents and position of the footer and the alignment of columns in the table of contents.



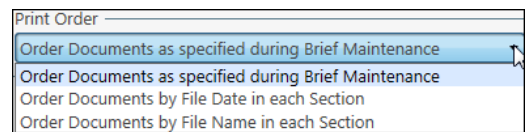
- The documents in each Section may be printed in ascending date order, in alphabetical order by filename or in the order in which they were added to the brief while it was being assembled or maintained.



- The footer offset is the minimum number of lines that must be maintained between the footer and the physical end of the page.
 - The options for page numbering in the footer are:
 - **Page:** Only the page number is shown;
 - **Section – Page:** The section number and the page number are shown;
 - **Section – Desc – Page:** The section number and description, and the page number are shown.
- Check the box to include totals (e.g. “Page 5 of 158”).

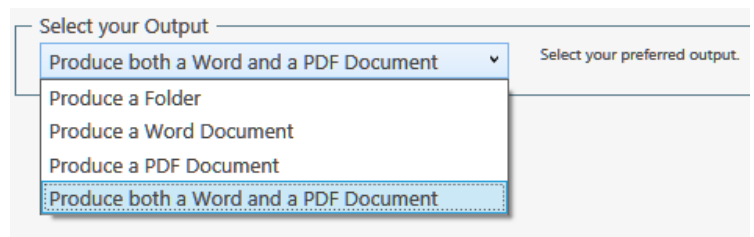


- You can set the footer font size and weight, or provide that there should be no footer.
- You may check the box to Left-Align the Table of Contents columns; if you leave the box unchecked, the page numbers will be right-aligned.



7. When you have selected the desired options for the print order of documents, the contents of the footer and the table of contents, click **Next**.

8. You will now choose the type of output. The options are a **Word** document, a **PDF**, or both of these. You may also choose to produce a folder of documents instead of a single document.



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