Keyhouse Computing Ltd.
IMI Business Campus,
Sandyford Road, Dublin 16.

Call +353 1 2902222
Email info@keyhouse.ie

KEYHOUSE END USER MANUAL

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Typographical conventions

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

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

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

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

Navigating the Search Screen

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

Chapter 1: Getting Started

Opening Case Management from A Server

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

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

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

4. Password protocols may be enacted on the system that will force users to change their passwords on a regular basis. These protocols may also prevent users from linking passwords to Window ID's

Opening Case Management from Azure

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

2. The first time you log in, you must use your **Email Address, Password** (the initial password will be supplied by Keyhouse) and a **Pin Number**. The Pin must have a minimum of 4 and a maximum of 6 numbers.

3. Click OK

4. An Authentication code will be sent to your mobile phone.

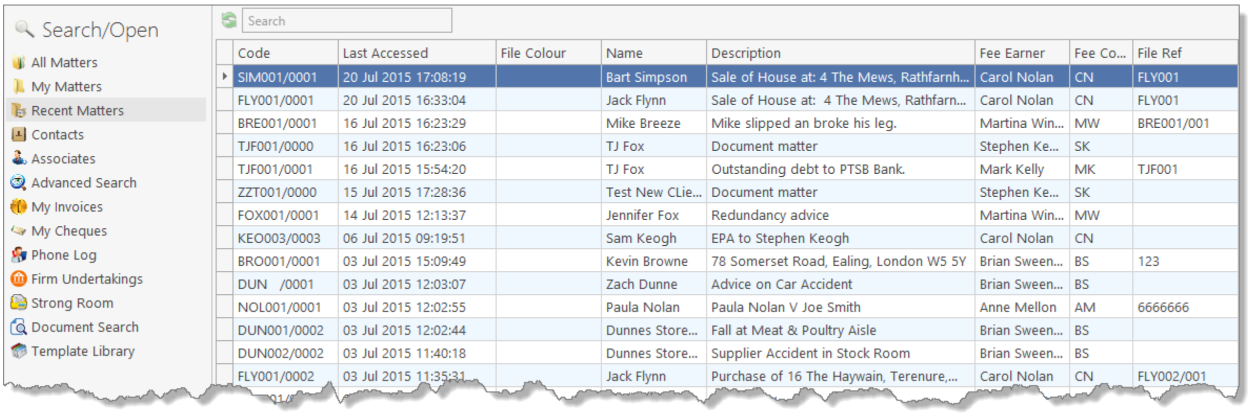
5. Enter the Authentication number and click OK.

Navigating around the system.

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

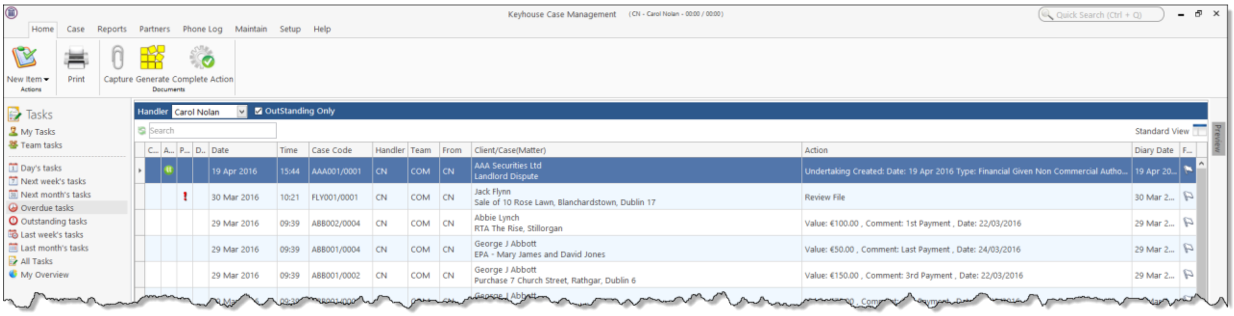
TIP: If you will always want to start in the same place, tick the box marked ***Don't show this screen again***.

2. **Open Case/Matters** takes the user to the **Recent Matters** search screen which will allow you to view all your cases, with those most recently accessed at the top.



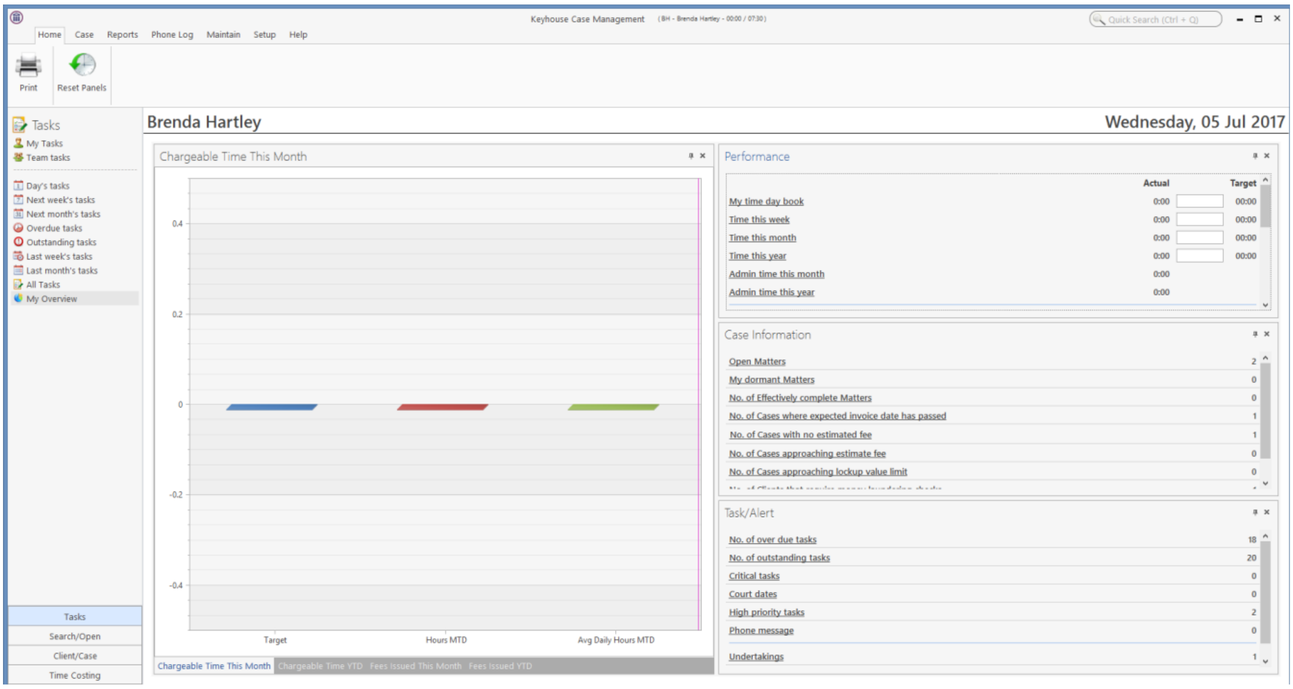
Code	Last Accessed	File Colour	Name	Description	Fee Earner	Fee Co...	File Ref
SIM001/0001	20 Jul 2015 17:08:19		Bart Simpson	Sale of House at: 4 The Mews, Rathfarnh...	Carol Nolan	CN	FLY001
FLY001/0001	20 Jul 2015 16:33:04		Jack Flynn	Sale of House at: 4 The Mews, Rathfarn...	Carol Nolan	CN	FLY001
BRE001/0001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

3. **Task Manager** will show you your task list.



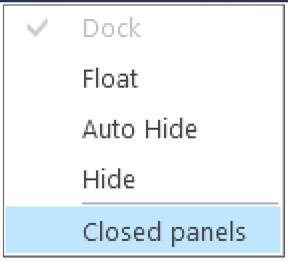
My Overview

The My Overview feature gives you an overview of the current state of your cases, including a list of 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.



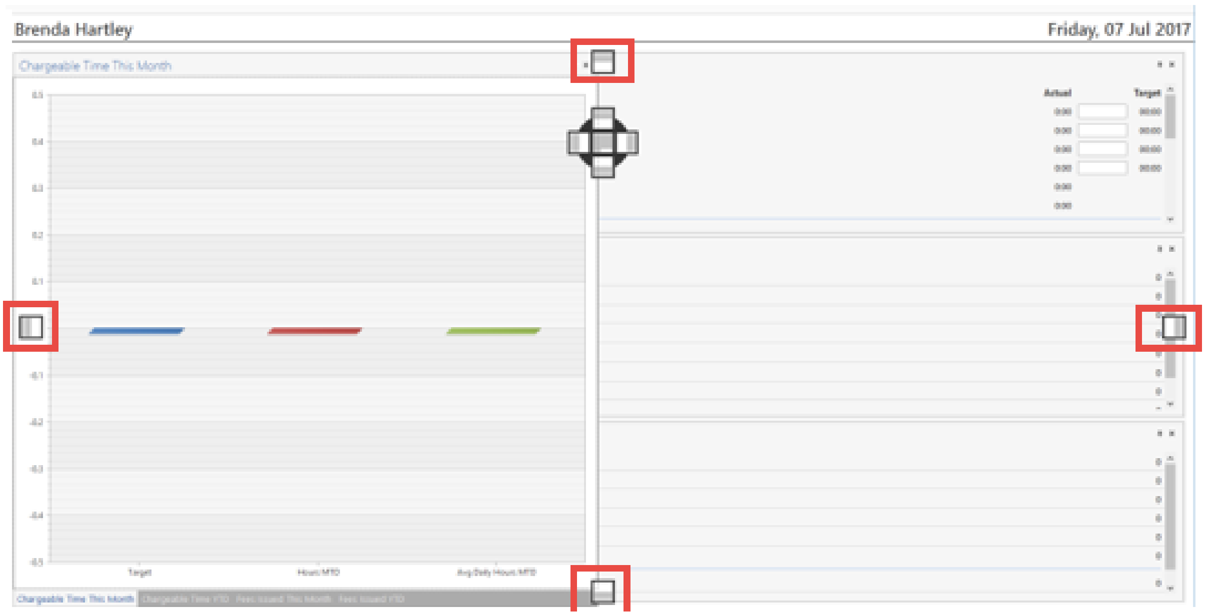
The layout of this screen can be altered to suit individual needs.

- Right click on the chart and click Float. The chart can then be resized to fit the screen.
- Click X to close.
- Clicking the X will also hide the charts.
- To Open a closed chart, right click on the screen and select Closed Panels.



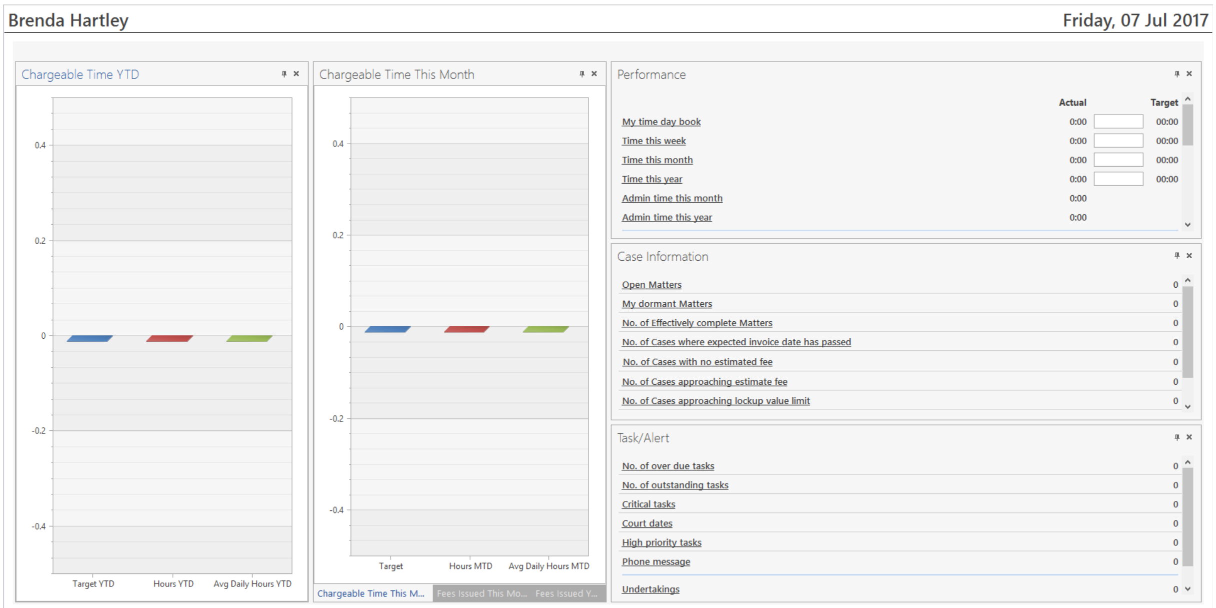
- The chart names will appear at the top of the screen

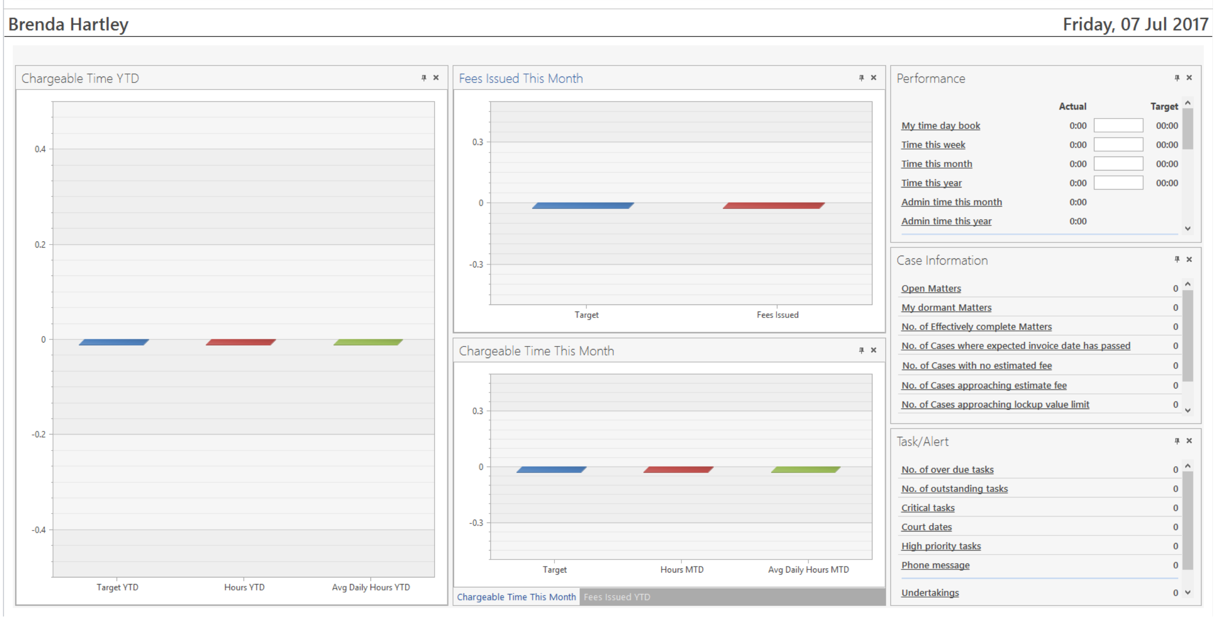
- Click on the name of a chart to view it.
- Column sizes can be adjusted by dragging to resize
- To dock the charts on the screen, right click and select Dock
- To reposition data on the screen, click on the heading e.g. the Fees Issued chart and drag until the positioning icons appear.



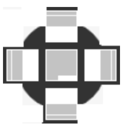
The highlighted icons indicate the location on the screen while the Cross indicates the position in the selected location of the screen.

- Then drop on the preferred position.



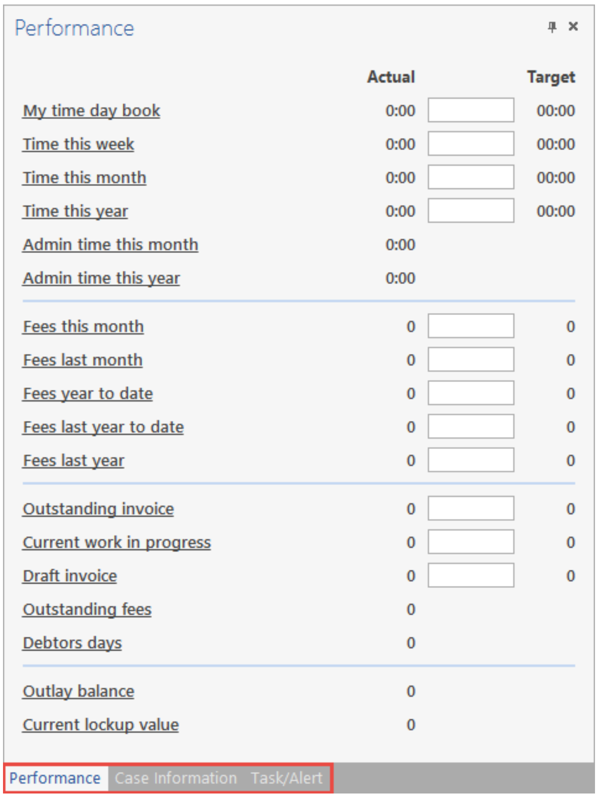


- To create tabs, click on the heading and drag down until the Cross Icon appears

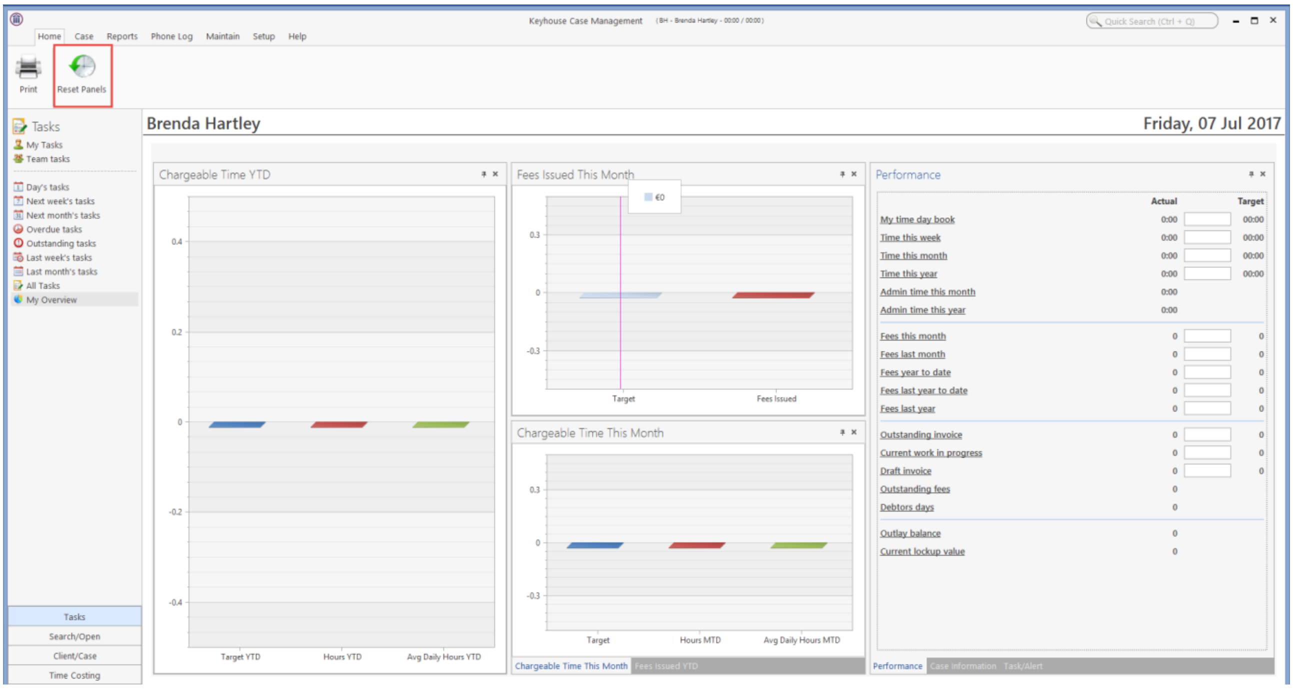


- Drop in the center of the Icon

- Tabs will appear at the bottom of the section

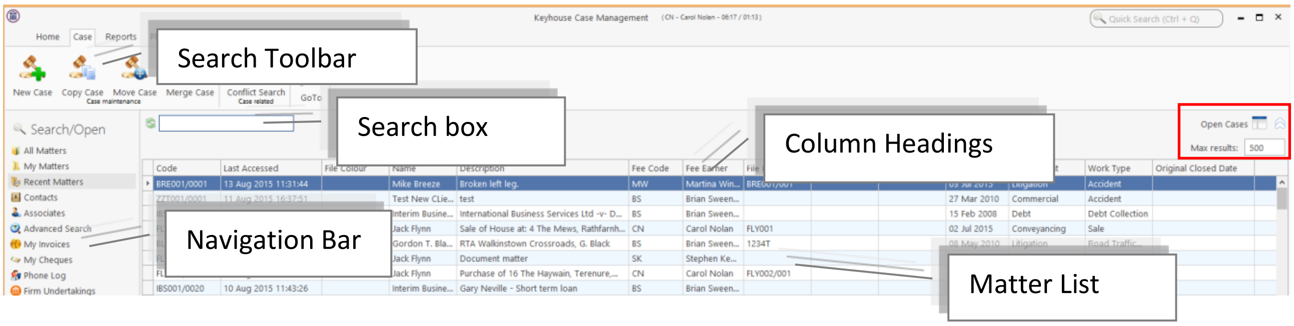


- Changes are saved automatically. By clicking the Reset button, the changes can be removed.



Chapter 2: Search & Open

The Search Screen



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

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

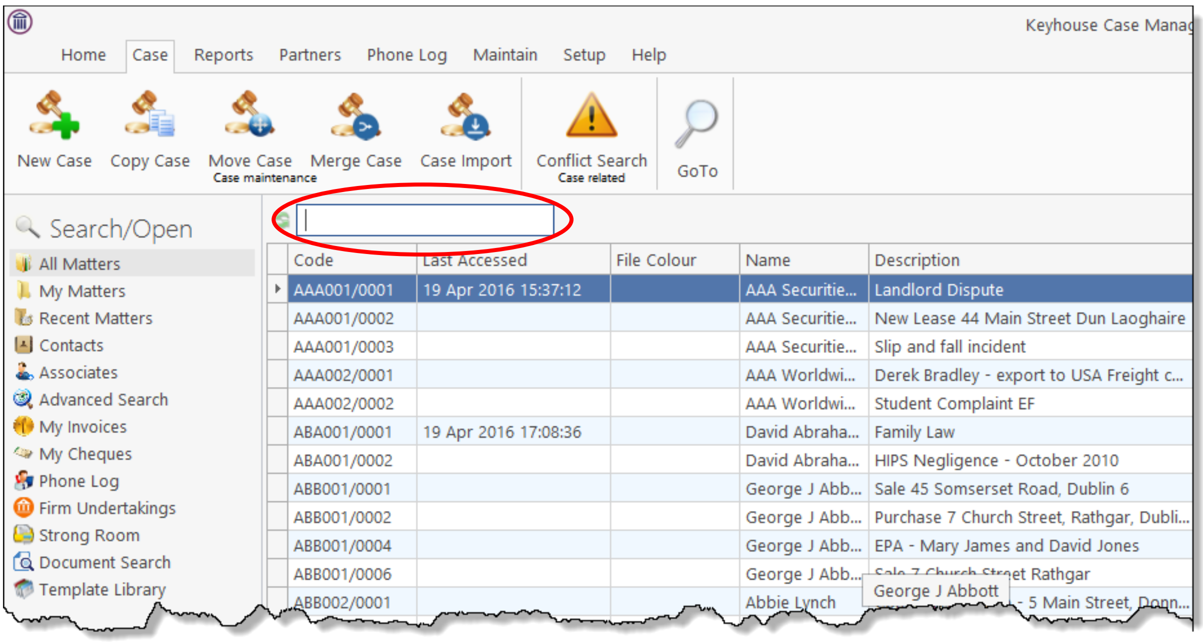
Tip: The number of results returned can be set. The minimum number is 100 and the maximum number is 500.

Search Lists

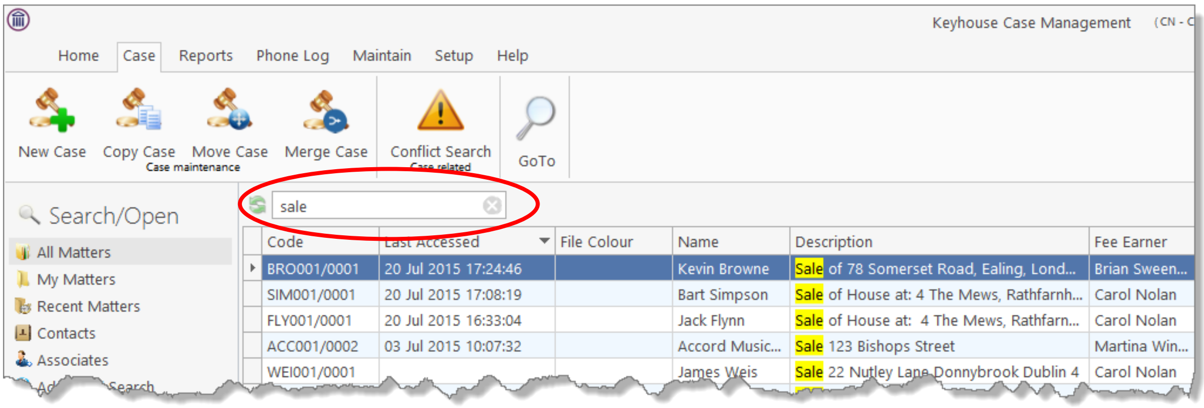
Search All Matters List

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

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



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

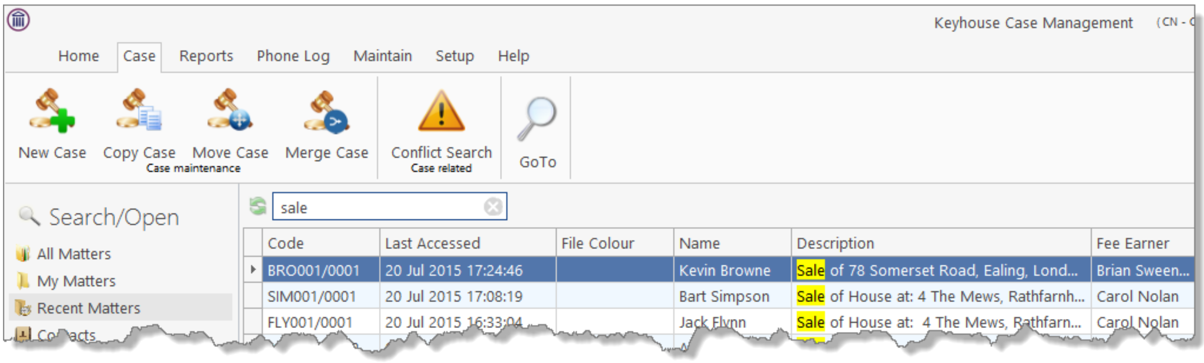


4. **Double click** the required matter to access the case diary for this matter.

Search Recent Matters

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

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



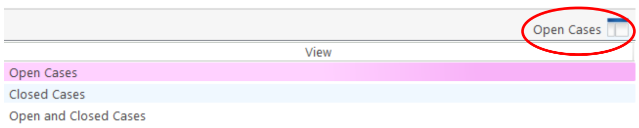
2. Click on Recent Matters in the Navigation panel.

3. **Input** a key search word in the **Search Box;** the search will be applied as you type e.g. “Sale”.

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

How to Search Open and Closed Cases

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



2. Click on the **View Tool** located on the right of the screen and 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.

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

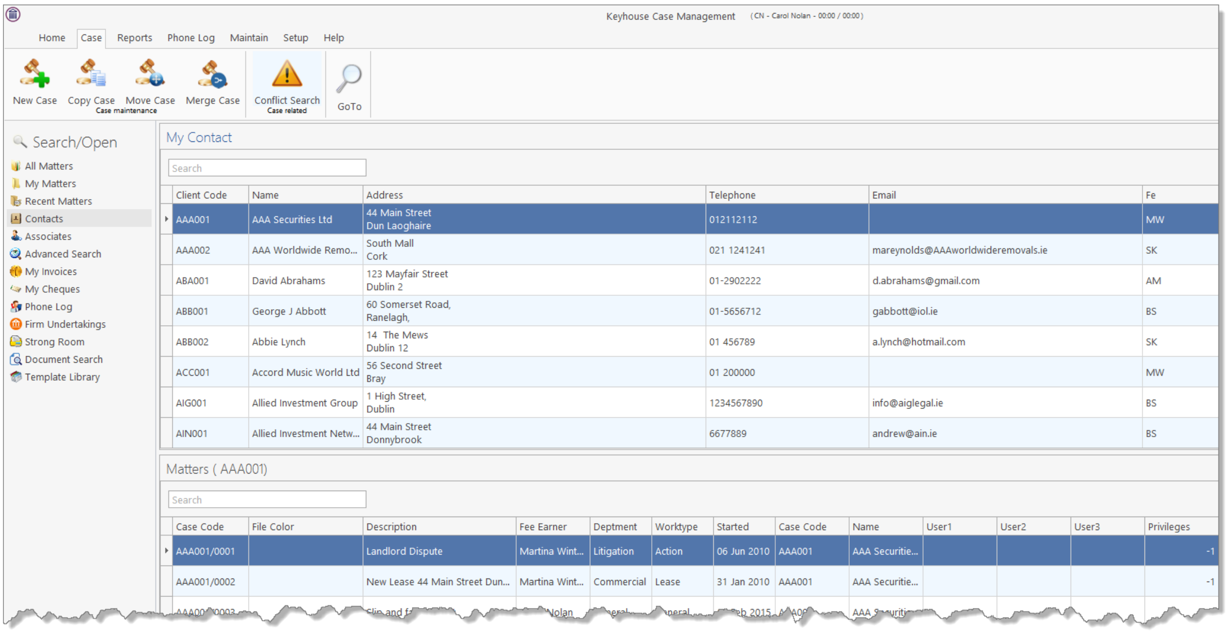
4. **Double click** the required matter to open the closed case diary for this matter.

> **Note:** No amendments can be made in the case diary for closed cases until they are re-opened. See the Chapter 16 for further details.

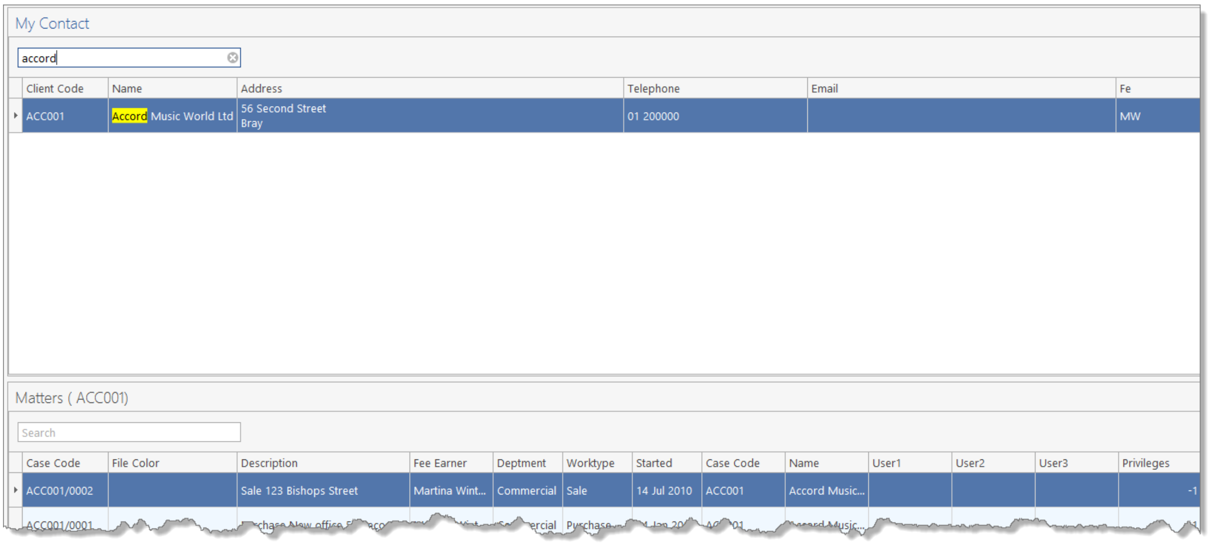
Search Contacts

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.



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".



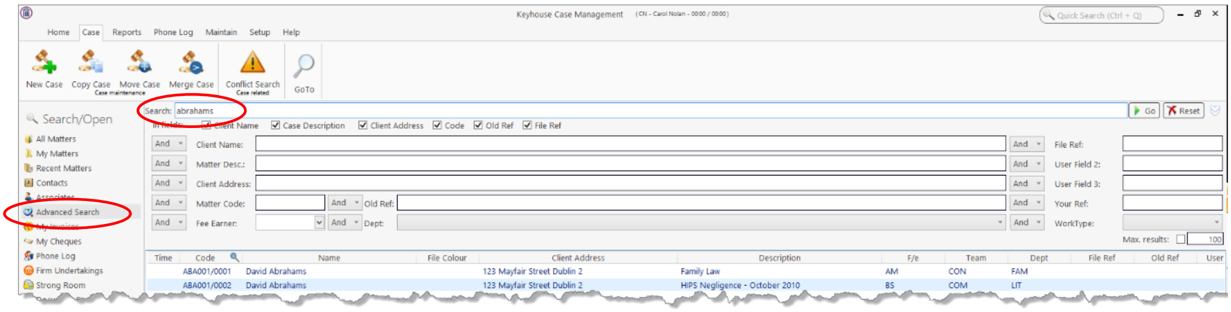
Tip: To view further details about a client double click the required client record.

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

The Advanced Search

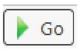
1. Click on Search/Open Cases.

2. Click on **Advanced Search** to see the advanced search options screen.



Simple Search

1. **Input** the key search words in the search box (circled above).

2. Press Enter on your keyboard or click **Go**. 

3. The **results** will be returned in the matter list in the lower part of the window.

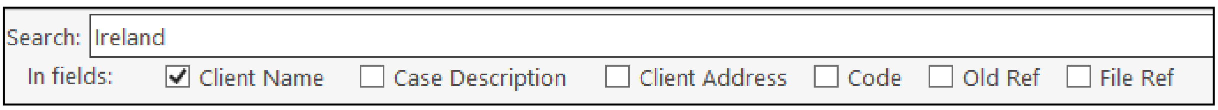
4. **Double click** the required case to open it in the case diary.

5. Click **Reset** to clear the search box. 

"OR" Search

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

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



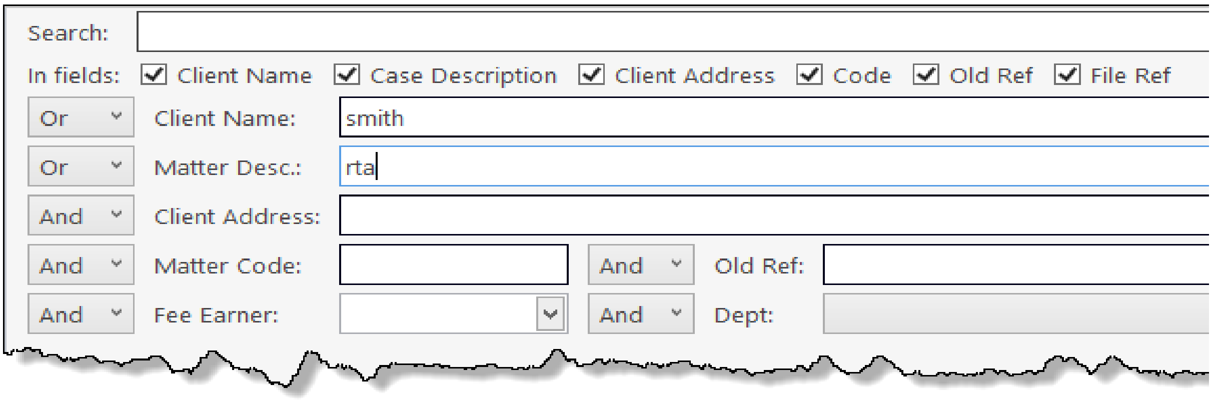
2. Input the **key search words** in the search box.

3. Click on **Go.** The results will be returned in the matter list in the lower part of the window.

   Sample Search:
   Search For: **Ireland**
   In fields: Client Name

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

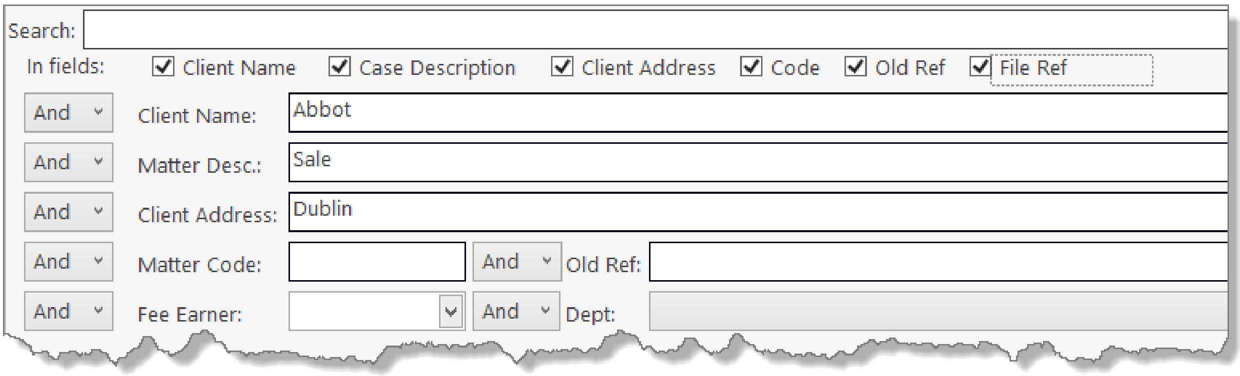
It is also possible to use the “Or” Search to search when you need to use 2 or more criteria.



“And” Search

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

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



2. Click **Go**.

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

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

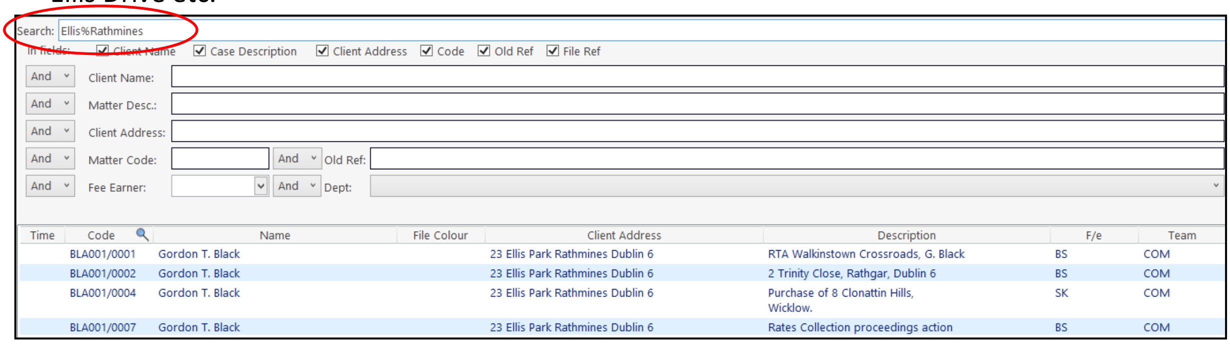
4. **Double click** to open the case diary of the required matter.

Searching using a Wildcard

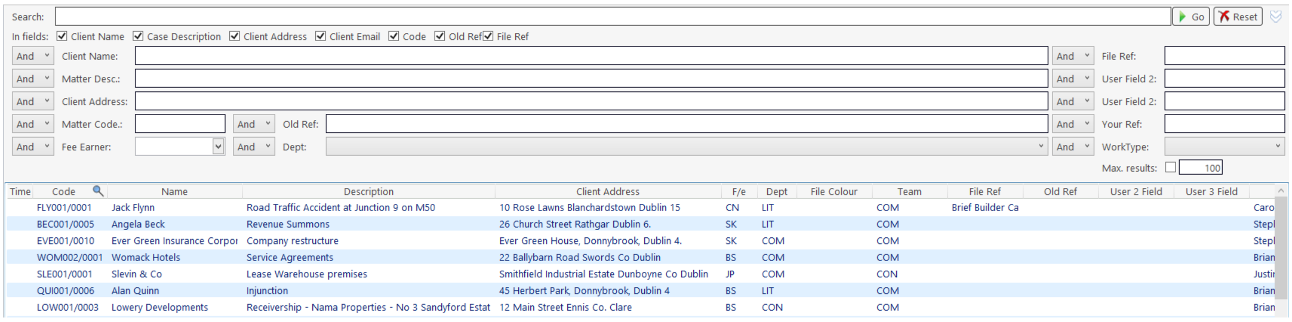
A wildcard is useful when you are unsure of how exactly a word may have been entered. The % sign is used as a wildcard in Keyhouse systems and will match any number of characters. Note also the system will use the % for an apostrophe e.g. O’Connor will change to O%Connor.

1. **Input** the first part of the **client's *address*,** then a % then the remaining part in the search box, e.g. Ellis%Rathmines and press enter.

2. The system will return any client addresses beginning with **Ellis** ending with **Rathmines.** E.g. Ellis Park or Ellis Drive etc.



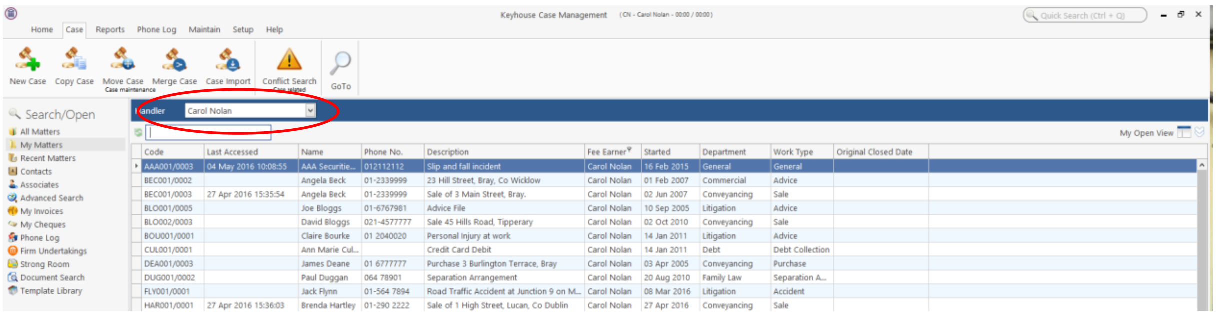
NOTE: The grid can be altered. By clicking and dragging on the line between the column headings, they can be resized. Click on the heading and drag to move the headings to a different location.



My Matters

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

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

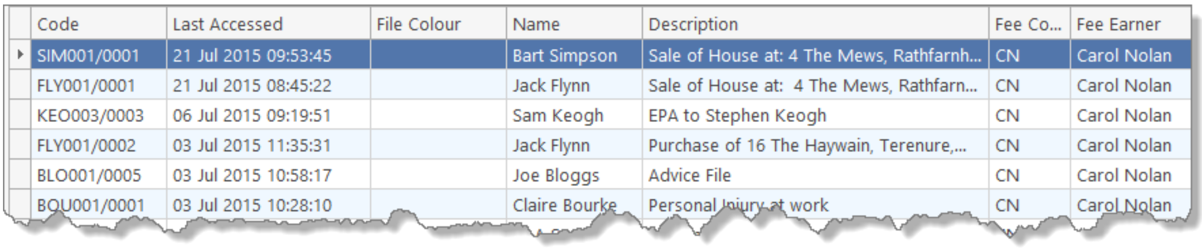


Manipulating the Search Screen

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

How to Sort Column Headings

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

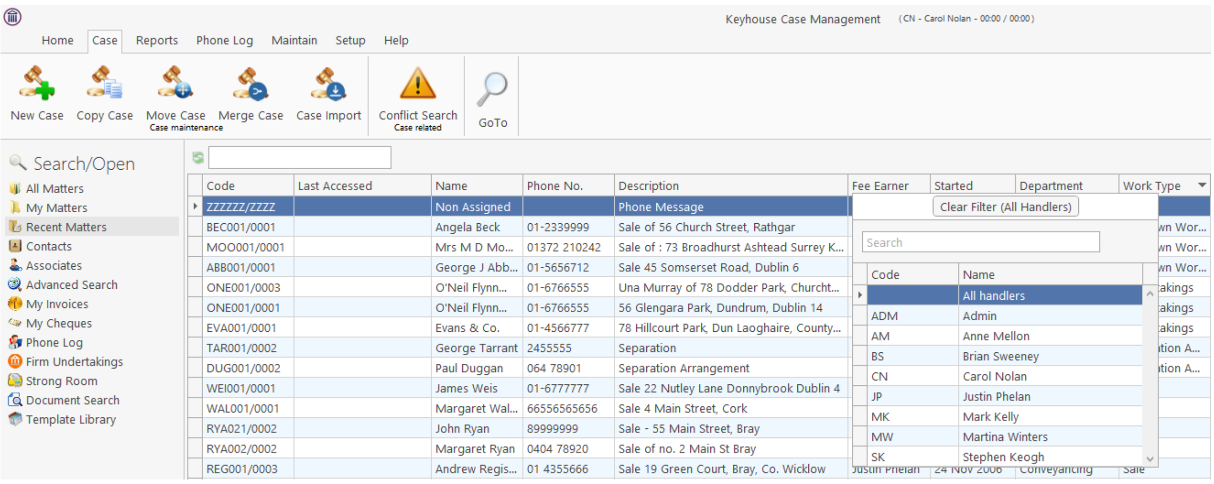


Code	Last Accessed	File Colour	Name	Description	Fee Co...	Fee Earner
SIM001/0001	21 Jul 2015 09:53:45		Bart Simpson	Sale of House at: 4 The Mews, Rathfarnh...	CN	Carol Nolan
FLY001/0001	21 Jul 2015 08:45:22		Jack Flynn	Sale of House at: 4 The Mews, Rathfarn...	CN	Carol Nolan
KEO003/0003	06 Jul 2015 09:19:51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

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.



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

Document Search

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

How to open the Document Search

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

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

3. The system will automatically search the name of the document and its content. However, if you only want to search by Document Name, tick the Search Document Name only option.

4. Optional -

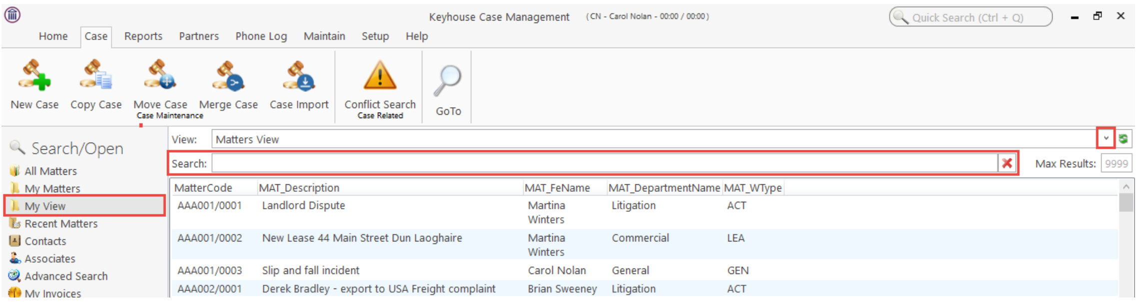
   - Select a client or leave blank to search against all clients.
   - Select a matter or leave blank to search against all matters.

5. To refine the search, use the Advanced Option

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

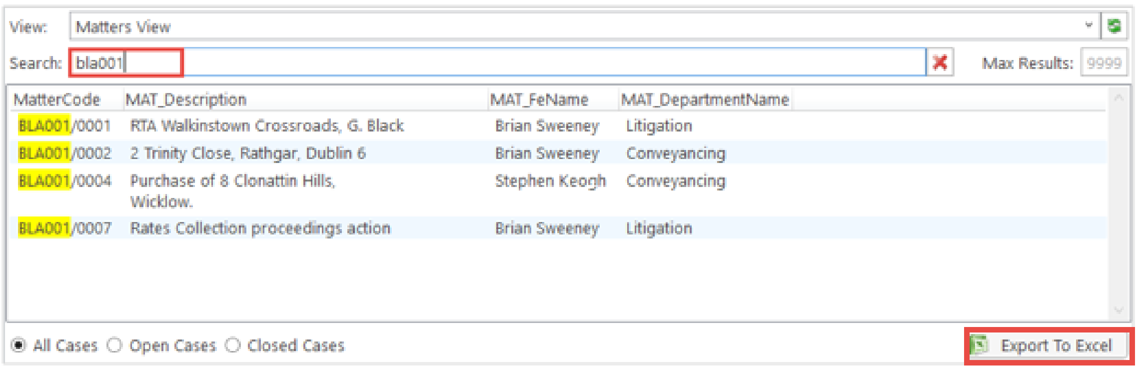
Custom View

Custom views enable the user to view information specific information in relation to matters. The information visible relates to the Current Case and the Extra Case Details screens. They are created by the System Administrator and if they have been created, they will be visible on the Search/Open screen. Information can easily be exported to Excel for reporting purposes.



1. Click on the drop-down arrow to choose or change the view

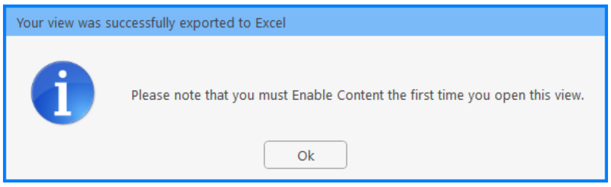
2. Click in the Search Box to refine the search.



3. To export to Excel, click the Export to Excel button.

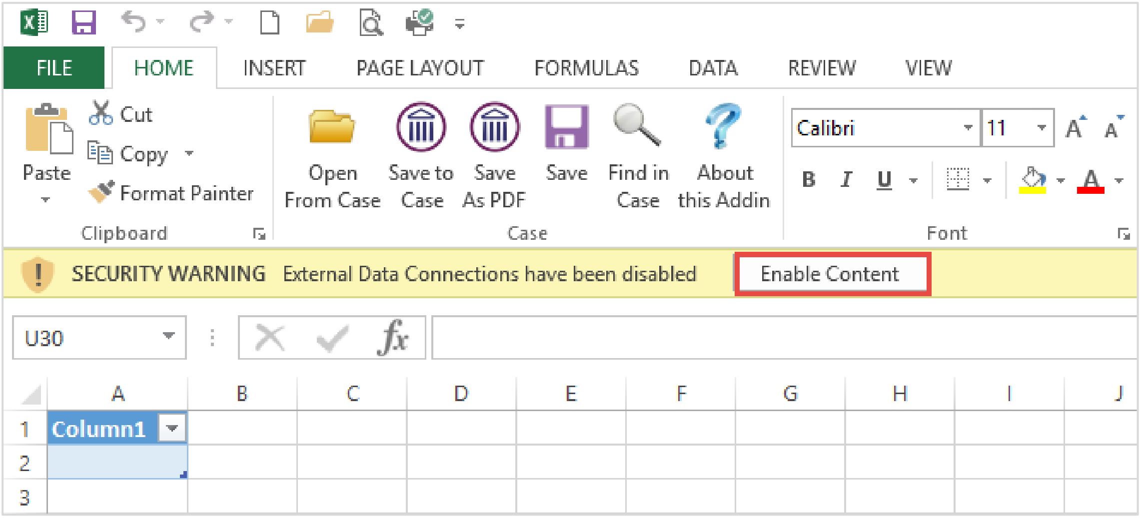
4. Choose the file storage location, enter a File Name and click OK

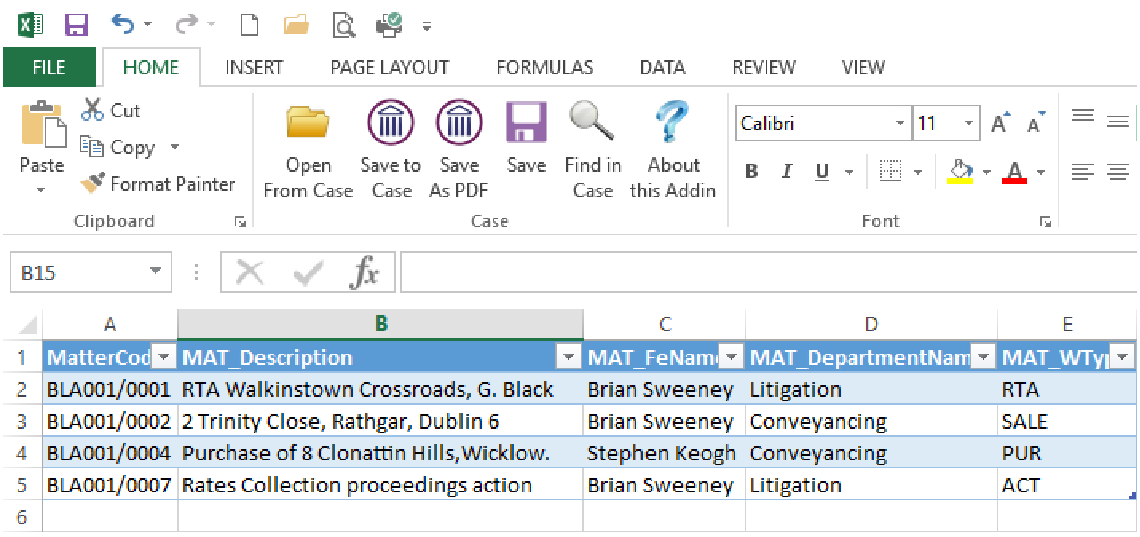
5. The following dialog box appears



6. Click OK

7. Excel will open with the content disabled
8. Click Enable Content to see the report

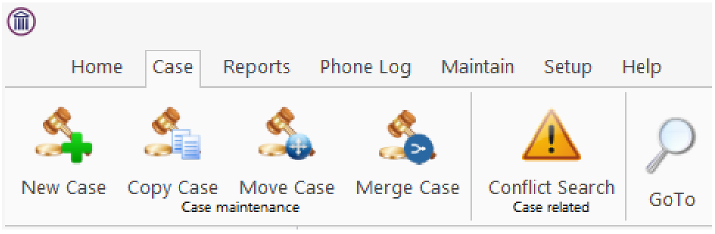




9. Edit the report as required and save to keep the changes.

Chapter 3: Creating New Clients and Cases

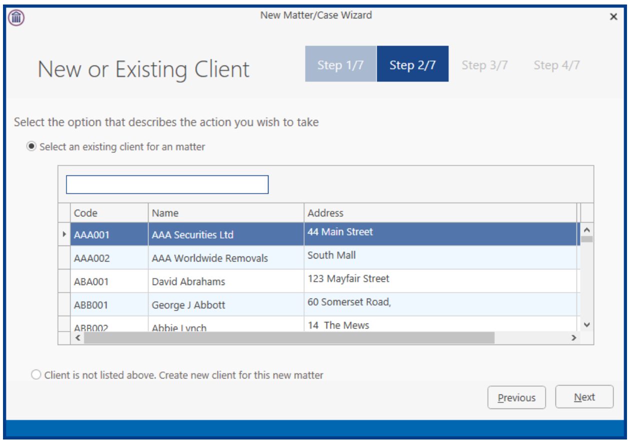
The New Case Wizard



Create a New Case for an Existing Client

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

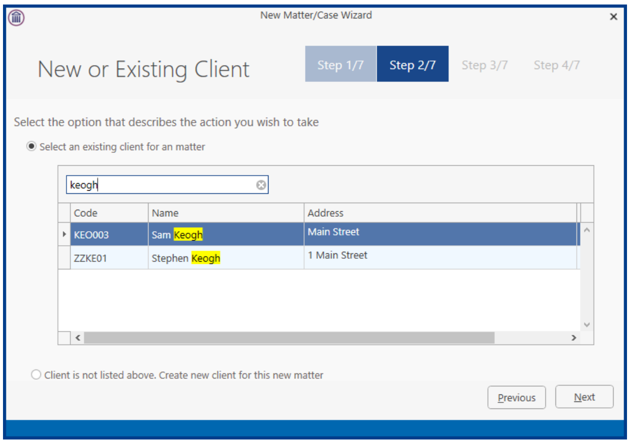
2. The ***New Matter/Case Wizard*** will open. The first screen contains a welcome message. Click **Next**.



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.

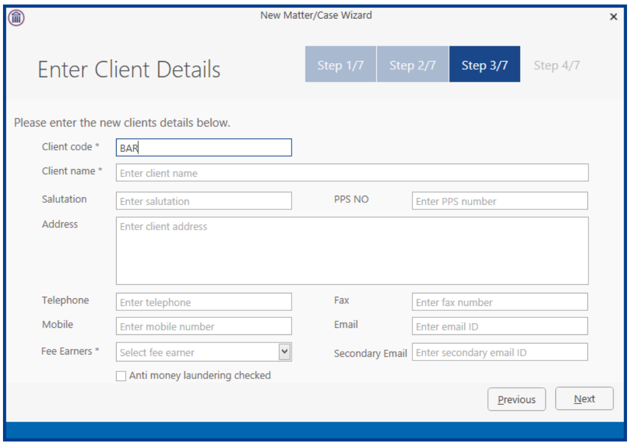
   You can sort the columns by clicking on the column headings.



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.



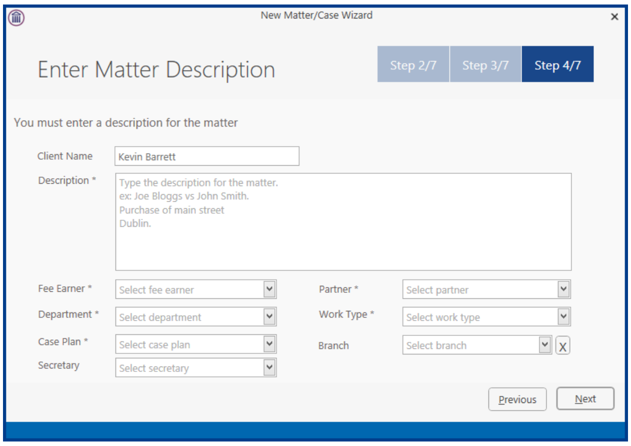
> **NOTE**: You can only use letters. For names that contain an apostrophe e.g. O'Sullivan, use OSU.

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

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

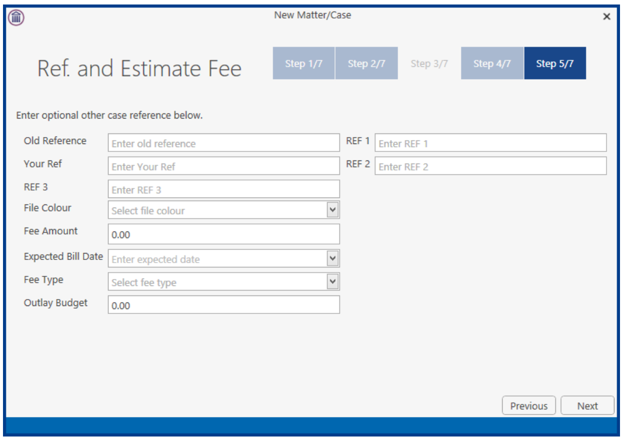
Input the matter description, then select the following from the relevant drop-down lists:

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

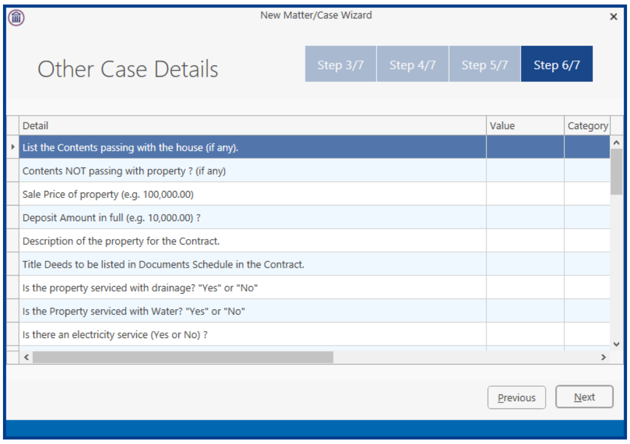


10. Click **Next** to continue to the next step. Most of the information sought by this screen is optional but that shown in bold italics below may be required, depending on your system settings:

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

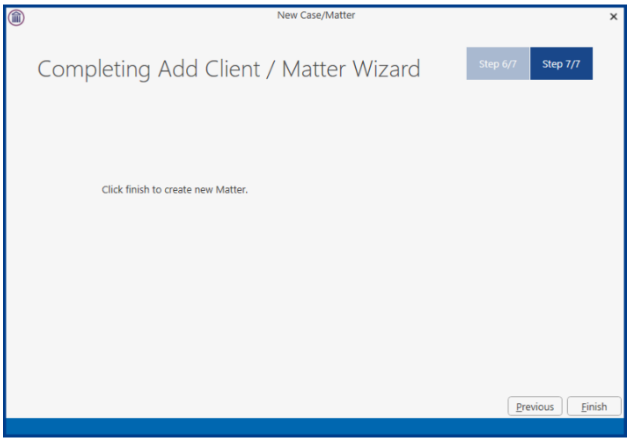


11. Click **Next** to continue to the next screen. Here you may be given a series of questions which, when answered, will be added into Extra Case Details. The questions asked will vary depending on the Case Plan selected. Depending on the setup of the Case Plan, there may be no questions.



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.

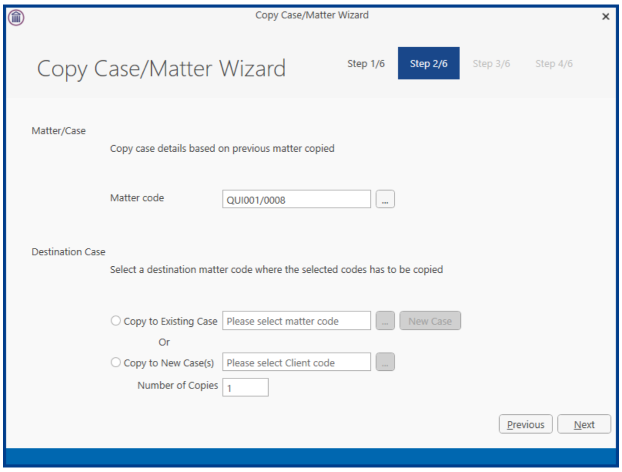


If you choose to copy details from another matter, a new wizard will start. See the next section, **Copy Matter Details** for more information.

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

Copy Case Details

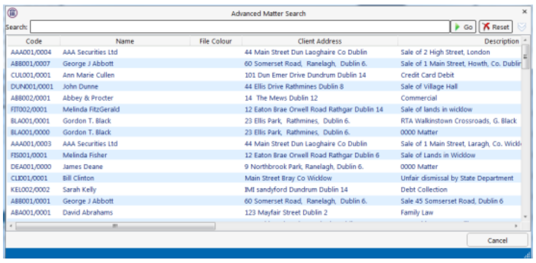
1. Click on the **Copy Case tool**  located on the **Case** tab of the Ribbon to open the **Copy Case/Matter Wizard**, which starts with a welcome screen.



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

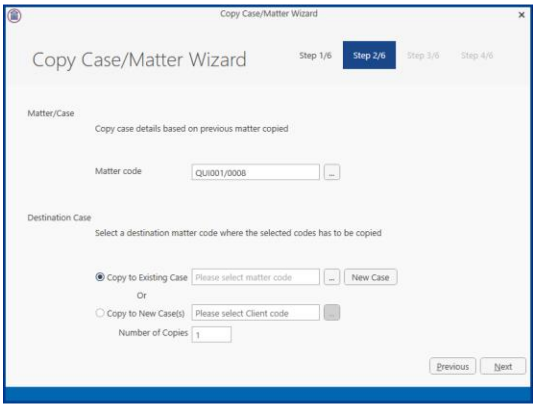
This will bring up a matter list which may be searched as described in Chapter 2.



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

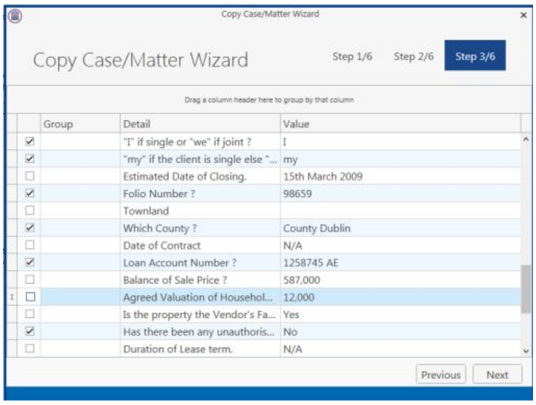
4. From the Destination Case section, select the Copy to Existing Case if the information is to be added to a matter already in existence. Alternatively, select New Case if a new source matter needs to be created.

5. Select Copy to New Cases(s) if you need to create multiple new matters.



6. Select the Client using the Browse button as described above. Then enter the number of matters to be created.

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

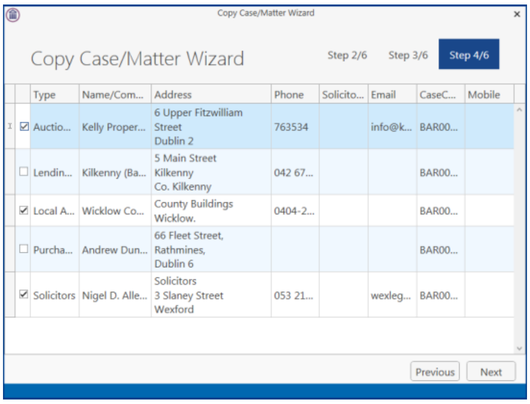


7. Click **Next** to continue to Step 3, which lists the **User Defined Fields** (UDFs) which are in use in the source matter.

8. The **UDF**s 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.

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

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

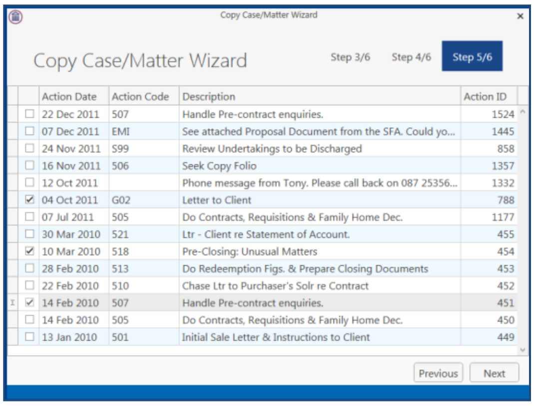


10. Click **Next** to continue to Step 4.

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

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

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



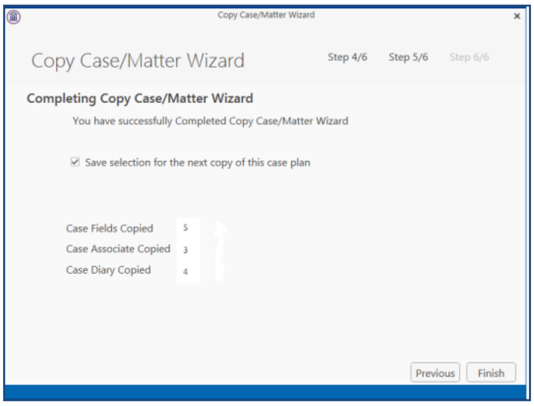
   If you right click over the check boxes, the option to Tag All or Untag All is available.

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

15. The procedure for selecting and copying the actions to the destination matter is similar to those for copying UDFs and Case Associates.

   If you copy any action to the destination matter you will also copy any documents attached to that action.

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



17. If you check the **checkbox**, details of the fields, Case Associates and actions which were copied, will be saved so that they will be selected by default the next time this source matter is copies. The final screen also provides a summary of the numbers of items copied.

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

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

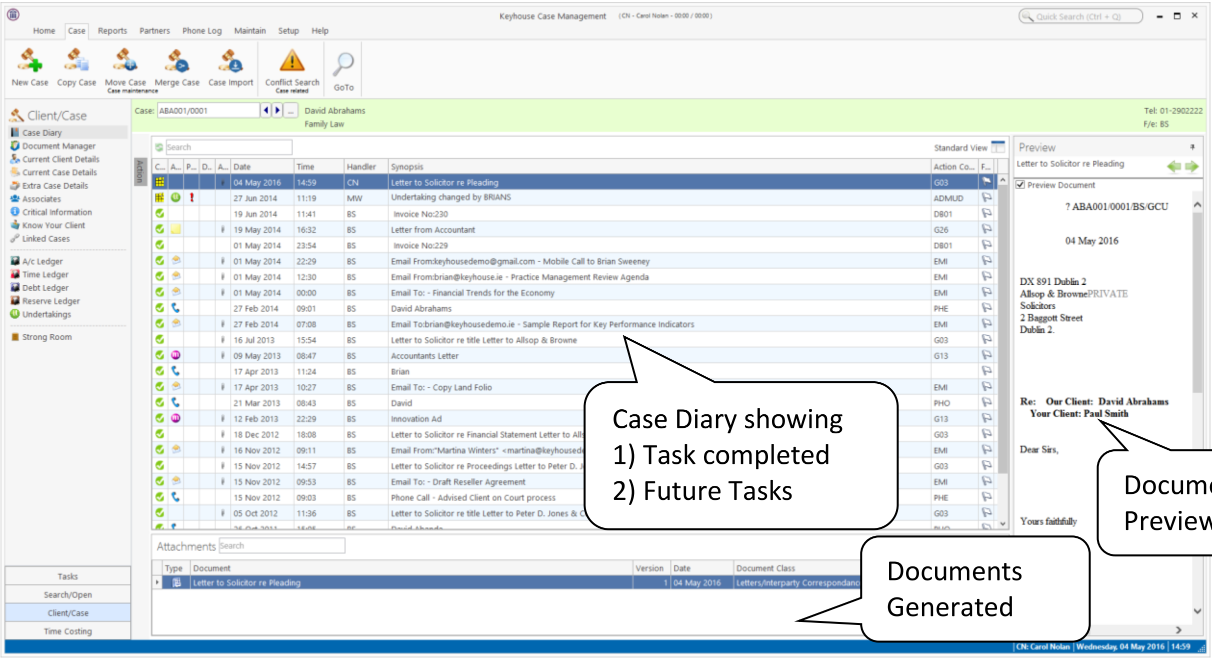
Chapter 4: The Case Diary

What is a Case Diary?

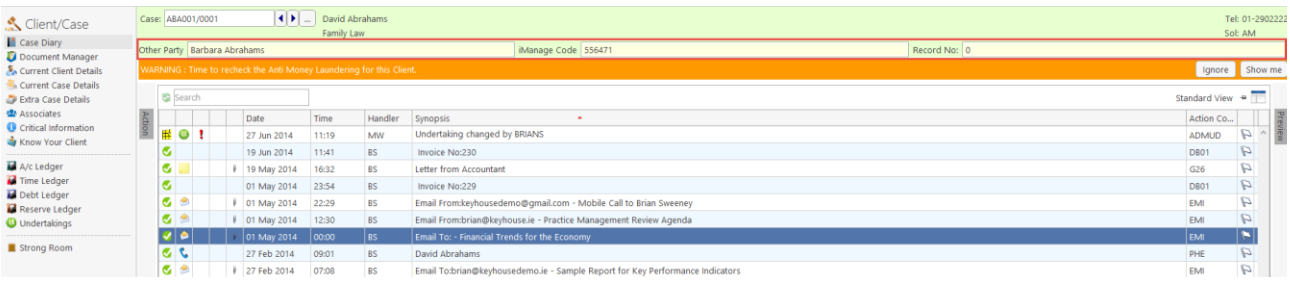
The case diary is the electronic equivalent of the paper file of a case. It displays a case plan to help guide you through a case. A Case Plan is made up of a series of Tasks/Actions; these actions in turn are made up of documents which are processed when a task is taken. The Case Diary records completed 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 case diary may also show current case details if it has been activated by the system supervisor. The names of the fields may vary depending on the fields that have selected. The User 1, User 2 and User 3 fields, once renamed, can be made visible.



Configuring the Case Diary Screen

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

How to Configure your Case Diary Screen

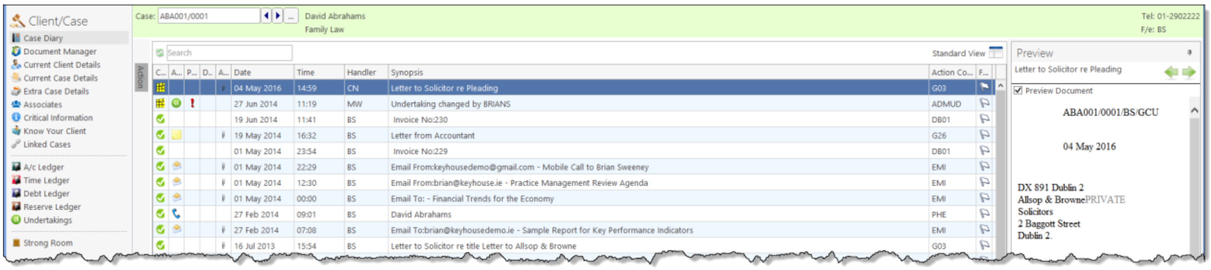
Now with the new version of the Case Diary each user can configure their diary screen according to their requirements. For example, secretarial staff may generally prefer to view the case plan in their screen while solicitors might only need to see it occasionally.

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

Sample 1: Standard Screen with fixed Floating Document Preview Pane

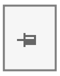
How to create this view:

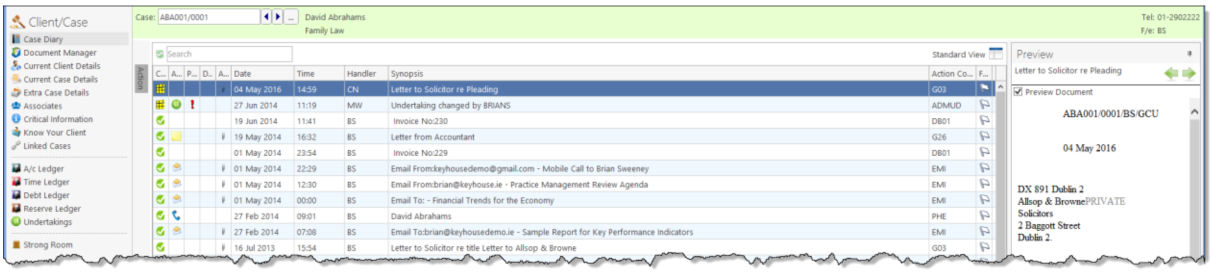
1. Move you mouse over **Preview** to the located to right of the Case Diary Screen the document preview pane will appear.



Sample 2: Standard view with fixed document preview pane

How to create this view:

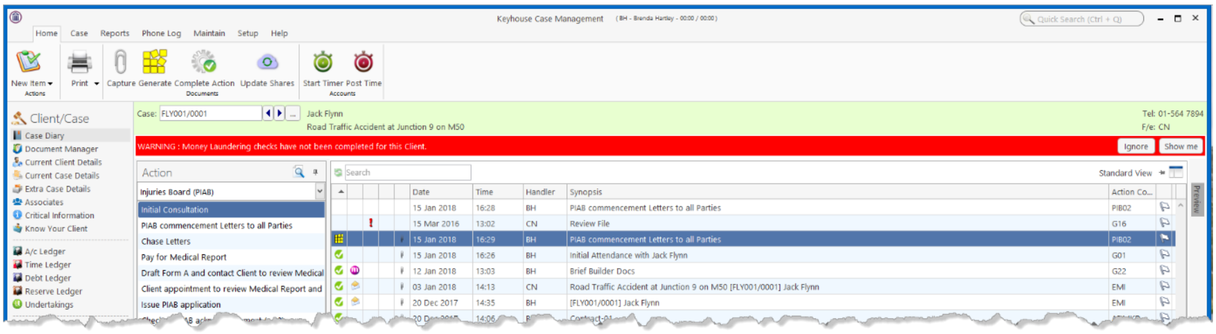
1. Move your mouse over **Preview** located to the right of the Case Diary Screen the document preview pane will appear.
2. Click on the Pin  to make it permanently visible.



Sample 3: Case Diary with Floating Case Plan

How to create this view:

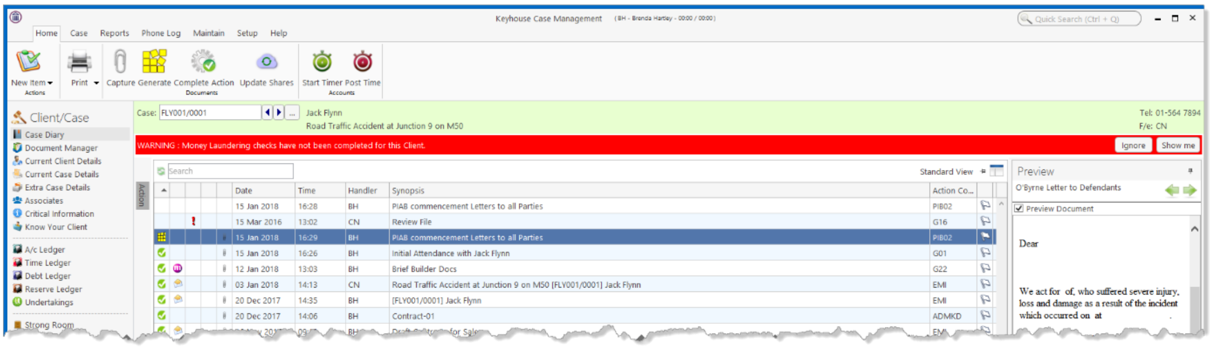
1. Move you mouse over **Action** to the located to left of the Case Diary Screen the Case Plan will appear.



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.

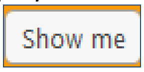
Caution: Please read any warnings specific to the file as they could be vital information specific to this case.

Show or Ignore a Message

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

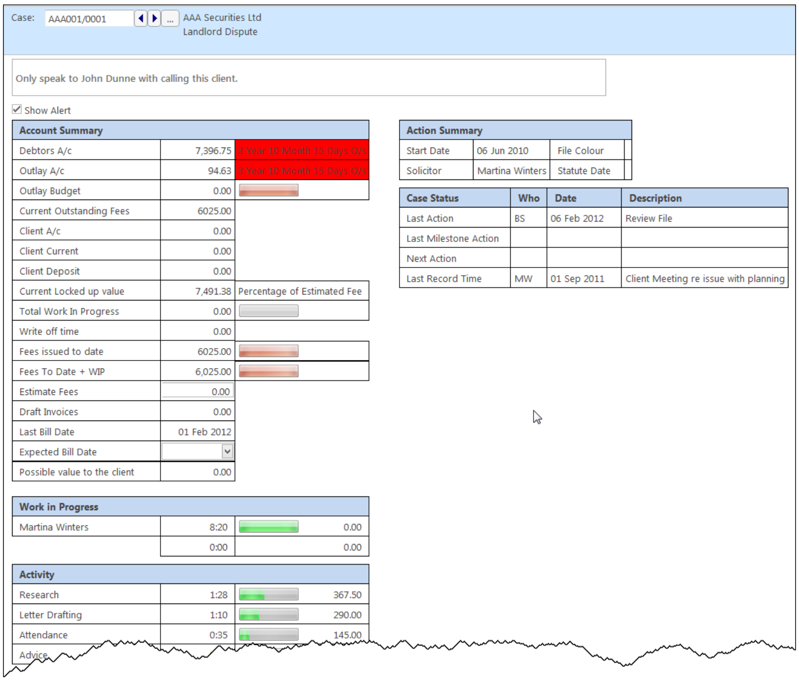
Note these warnings are displayed in the **Case Diary Screen**.

2. The caution messages are displayed at the top of the case diary of each case.

3. Click on the **Show me button** 

located to the right of the message you will then move to the **Critical Information Screen** to show further information.

4.



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**.

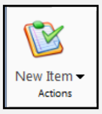
5. Click on the **Ignore** 

to ignore the message and remove it from the case.

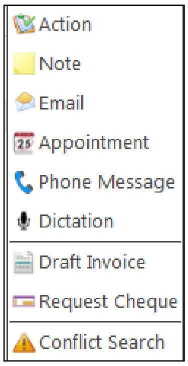
Case Diary Symbols

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

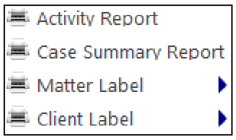
The Case Diary Toolbar



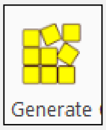
New — Click on the New to add any of these tasks.



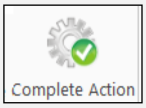
Printer — Click to print any of the following reports:



Capture — Click on capture to launch the document capture program to import documents or folders of documents or images.

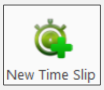


Generate — Click to generate a document for a selected action.

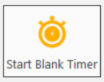


Complete Action — Click to mark a task as complete.

Start Timer — Click to start the timer for the current case.



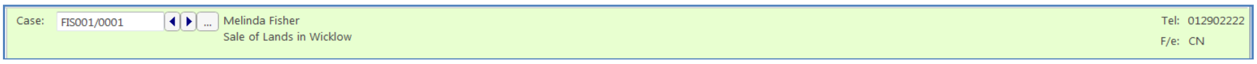
New Time Slip — Click to bring up a manual time slip.



Start Blank Timer — Click to create a blank time that can be added to a matter at a future time or post the time as Admin Time.

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

Navigation within the Case Diary



Case: FIS001/0001	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 (Ctrl + Q)	Quick Search	This button is available on all screens and will allow you to quickly find any case.

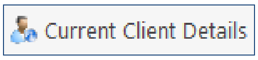
Case Diary Navigation Panel

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

Amending Client and Case Details

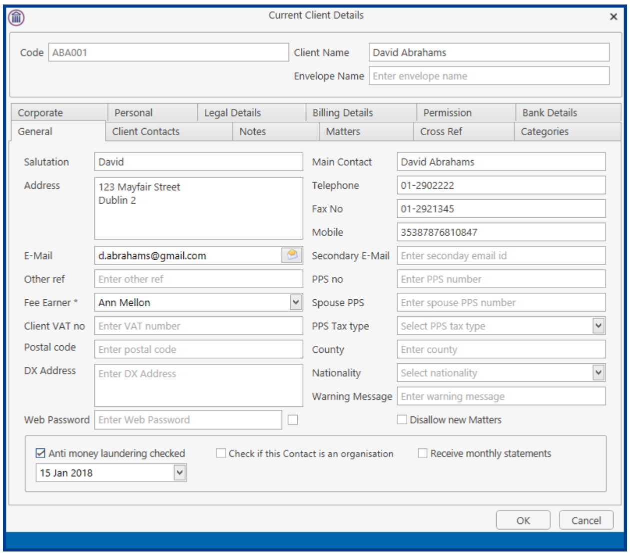
Updating Client Details

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

2. Click on **Current Client Details** 

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

   Input the following information as required:

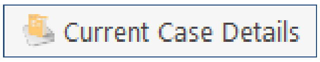


General	**Input/Amend** information on the client's name, address, telephone numbers etc. This screen also has an option to add a client **"Warning Message"** and **"Disallow new Matters"**.
Client Contacts	Click on **Client Contacts** to add additional client contacts for example the client's spouse or if the client is a company add an employee's details. The order of the client contacts can be changed using the Right Click Menu.
Notes	Click on the **Notes Tab** to enter notes relating to the client.
Matters	Click on the **Matters tab** to view a list of all active matters assigned to this client. It will also give the option to set the matter as the Billing Matter for composite billing.
Cross Reference	Click on **Cross Ref tab** to cross reference the client with another for example a husband and wife.
Categories	Click on **Categories tab** to add the client to a category.
Corporate Personal	Click on **Corporate tab** to add the company details e.g. Company Registration Number. Click on the **Personal tab** to add the client's personal details for e.g. Date of Birth, Date of Marriage etc.
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. New Groups can be set up by the System Administrator. They also control access to the groups.
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** 

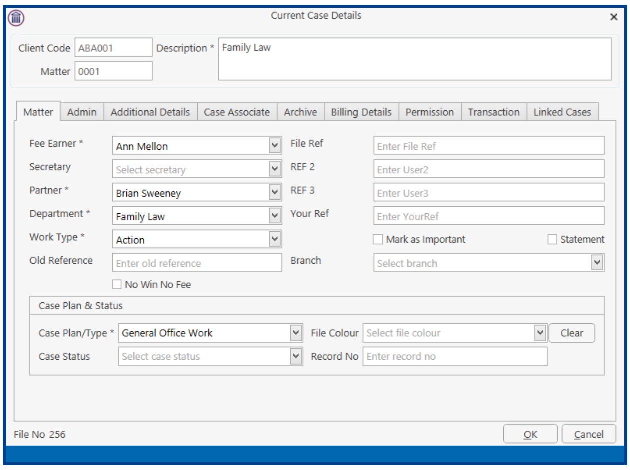
located on the **Navigation** panel.

3. Input/Amend the following details as required:

Matter — **Input/Amend** any details relating to the matter description.

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

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



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

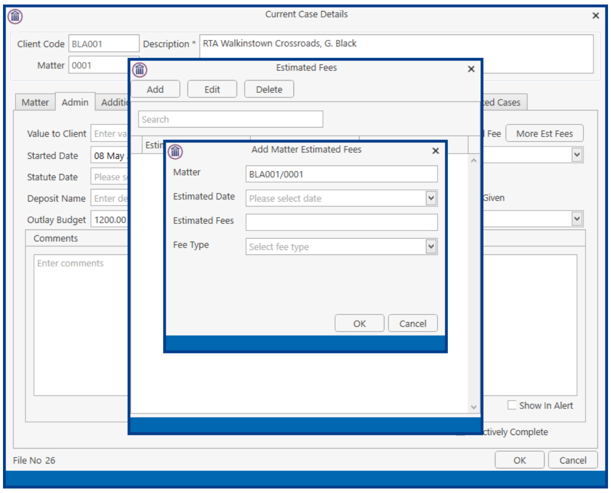
Click on the **drop-down arrows** to amend the Case Plan, Status and File Colour.

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

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

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

More Est Fees — Allows user to enter information about future invoicing in relation to fees and when the invoice should be issued. The Fee type can also be added if needed.



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

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

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

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

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

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

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

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

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

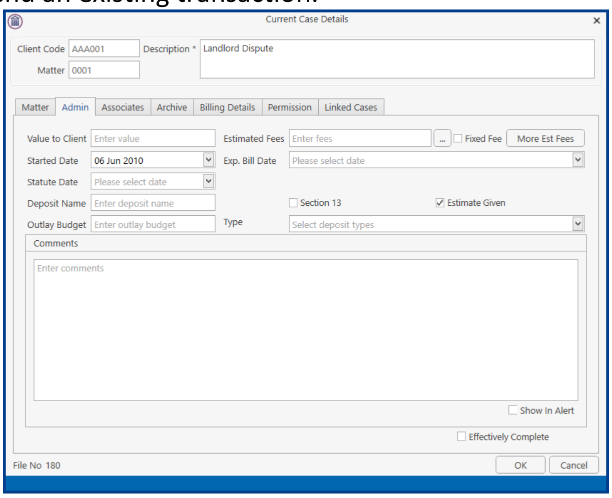
For Debt cases input the charge arrangements, the debt amount collected, and the total debt amount collected.

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

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

Permissions Click on the **Permissions tab** to control access to this matter, for example to add or remove particular user groups. New Groups can be set up by the System Administrator. They also control access to the groups.

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



Note the balance will automatically update.

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

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

Inserting a Statute of Limitations Date

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

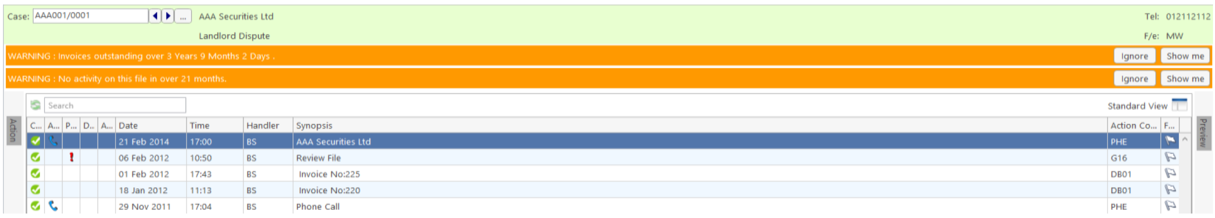
2. Click on **Current Case Details** located on the case Diary shortcut bar.

3. Click on the **Admin** Tab.

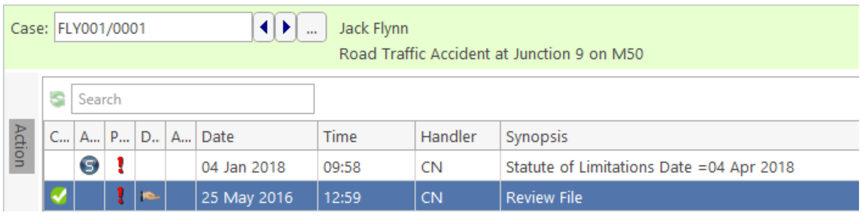
4. **Input** a Statute Date or click on the down arrow to select a date from the calendar.

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

6. The **Statute Date** will now appear as a task in the Case Diary assigned to the case **Fee Earner** and dated **prior** to the actual Statute of Limitations Date for reminder purposes. The number of days warning is set system wide and can be set by a system Administrator. Please see the Admin Manual for details.



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

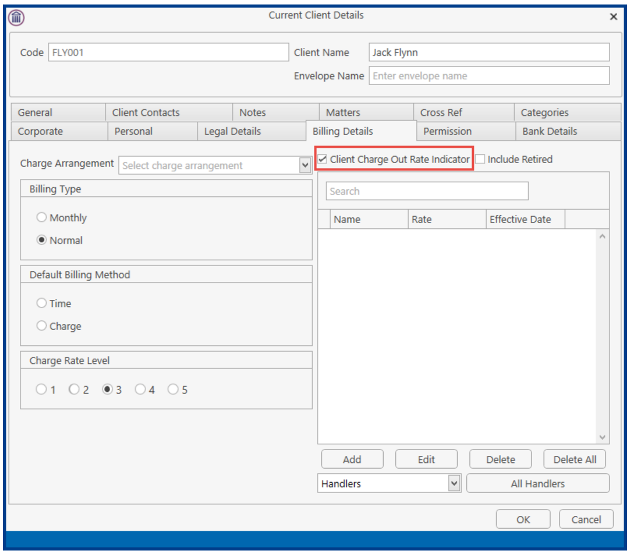


Charge Out Rate

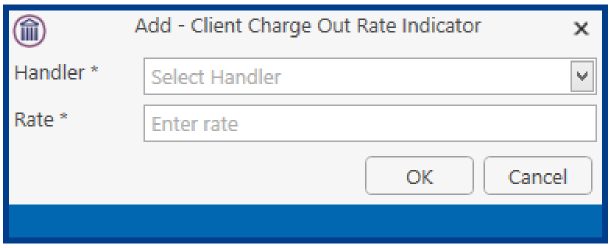
When there are multiple fee earners working on a client or matter with agreed rates, Charge Out rates can be set at a client or matter level. This will ensure that the correct rate is applied to each time slip. The Charge Out Groups are set by the System Supervisor and can be applied to each handler with a standard default rate. However, this rate can be changed from client to client and from matter to matter.

Set Handler Charge Out Rates

1. On the Current Client Details Screen, click to Billing Details Tab and tick the Charge Out Rate Indicator box.



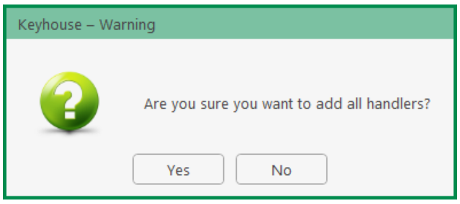
2. Click Add to import each handler individually. This can be used when all handlers are not being set on the matter.



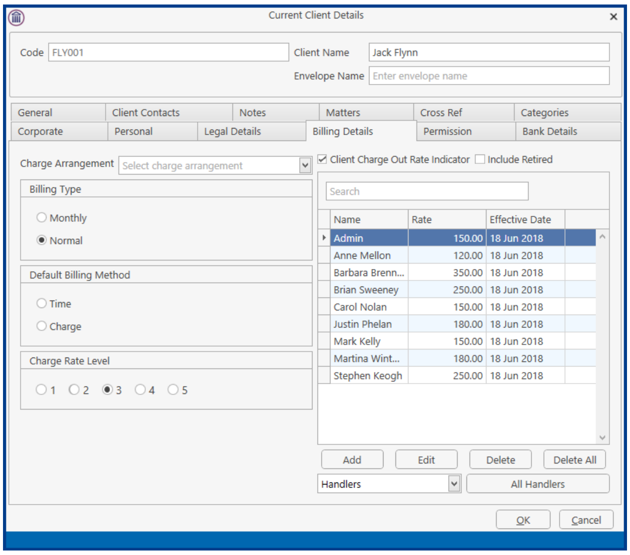
3. Select the handler from the drop-down list and set the rate to be applied for the client.

Alternatively

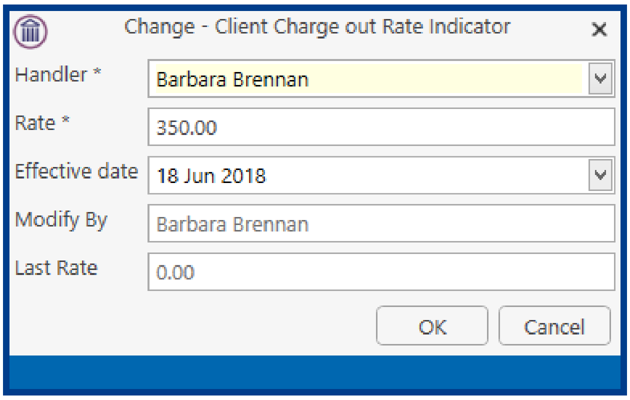
4. Click All Handlers to import all handlers at once. The following dialog box appear, click OK.



5. The fee earners default rate is applied.



6. To change the rate or the effective date, select the fee earner and click edit or double click to open the entry.



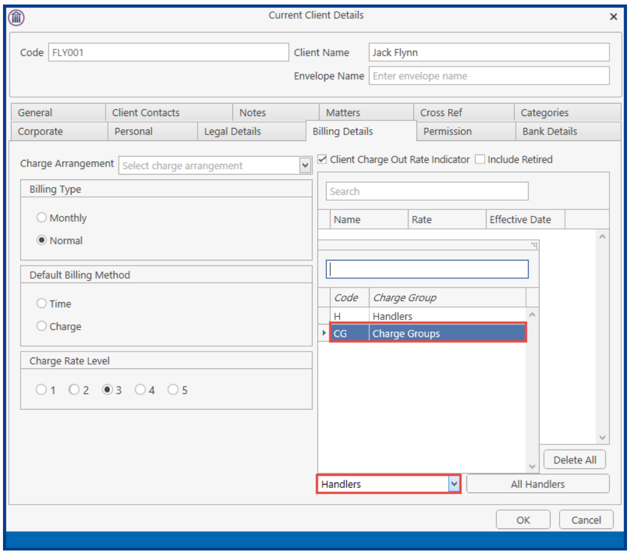
7. Change the required fields and click OK to apply the changes. Note: Access to this function may be restricted by the System Supervisor.

NOTE: If the effective date is changed to a date in the past, the charge out rate will be applied to all unbilled time up to and including the new date.

Set Handler Charge Group Charge Out Rates

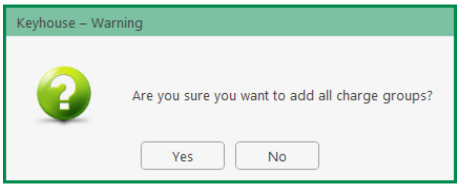
Once a fee earner has been applied to a Charge Out Group, the rate set for the group automatically applies to the fee earner. This reduces the amount of data that must be maintained. Rather than maintaining each fee earner, only the groups is maintained as rates change.

1. Click the Charge Out Rate Indictor option on the Billing Details Tab

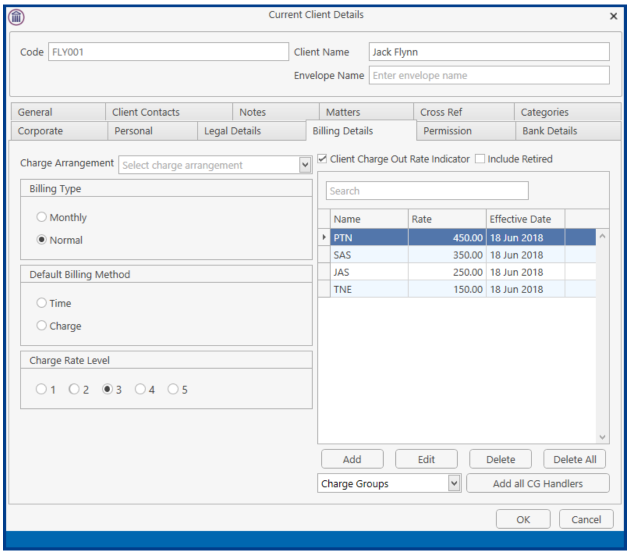


2. Click on the drop-down option beside handlers and change to Charge Out Groups

3. Click All CG Handlers. The following dialog box appears.



4. Click Yes to add the groups.



5. To modify the rate or effective date for a charge group, open the group and make the changes. Then Click OK. Note: Access to this function may be restricted by the System Supervisor.

NOTE: If the effective date is changed to a date in the past, the charge out rate will be applied to all unbilled time up to and including the new date.

Case Associates

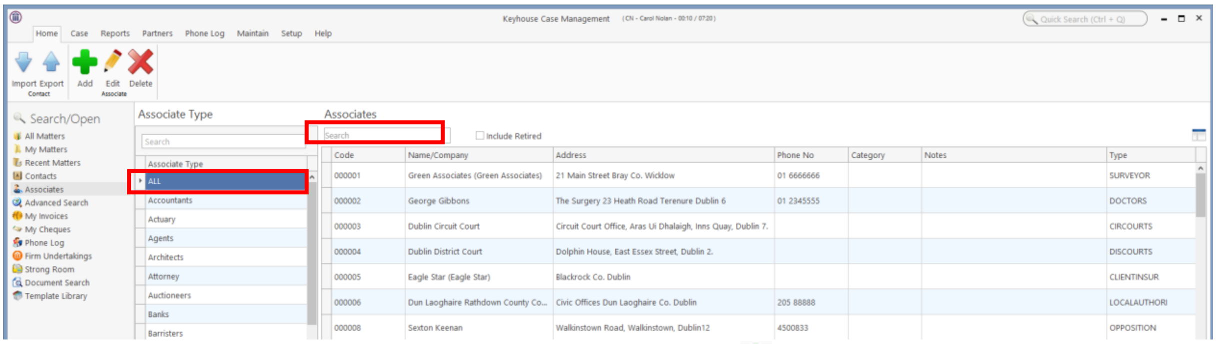
What are Case Associates?

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

Adding a Case Associate

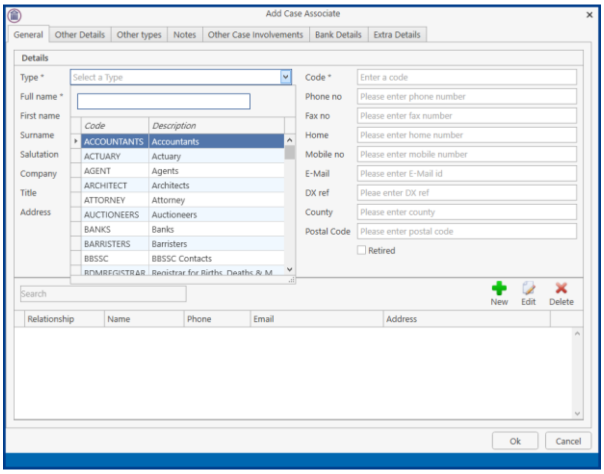
1. Go to **Search/Open** and select **Associates** from the Panel on the left.

2. Before creating a new associate check to see if it already set up. Click on **All** in the **Associate Type** then enter the name in the **Search Box** for Associate.



3. If the Associate is not listed, then click the **Green Cross** to add 

4. Input the **relevant** information



Full Name: Input the Full Name

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

Salutation: Input the Salutation

Company: Input the company name

Title: Input the title i.e. Mr, Mrs etc.

Address: Input the address

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

Phone No: Input the main phone number

Fax No: Input the fax number

Home: Input home phone number

Mobile: Input mobile phone number

E-Mail: Input e-mail address

DX Ref: Input the Document Exchange reference if applicable

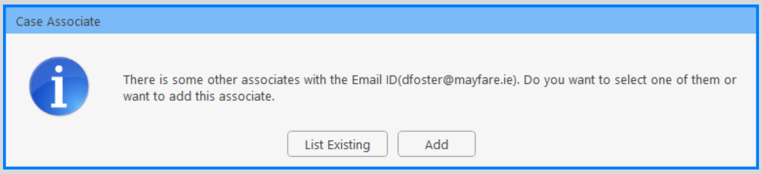
Nominated: Tick is this is the nominated contact.

County: Input the county.

Post Code: Input the post code.

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

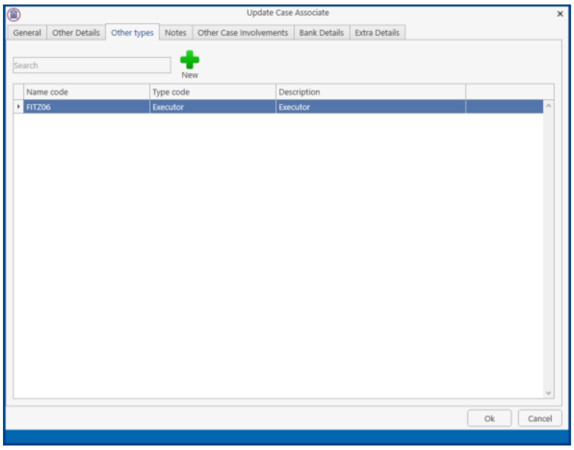
5. Click **OK.**

> **NOTE:** When adding an associate, the email address will be checked against the email addresses stored in the system. If it is already in use the following warning will appear.
>
> 
>
>
> Click List Existing to see the existing associate.

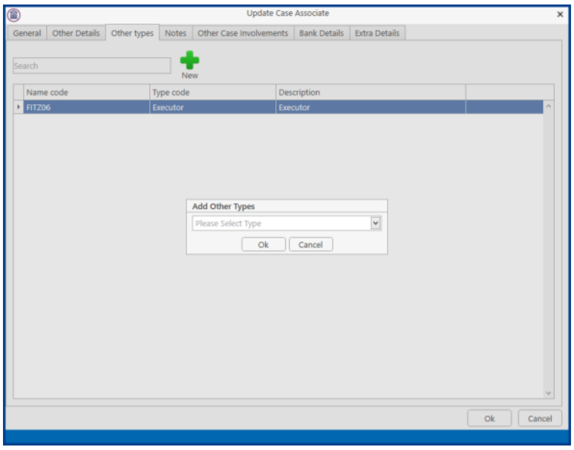
Adding an Associate to Other Types

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

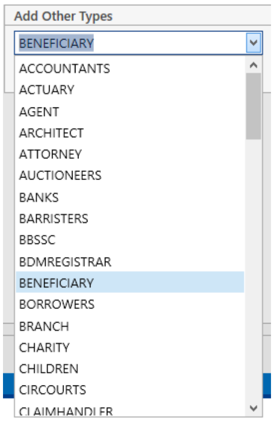
1. Open the existing **Associate** and select **Other type**.



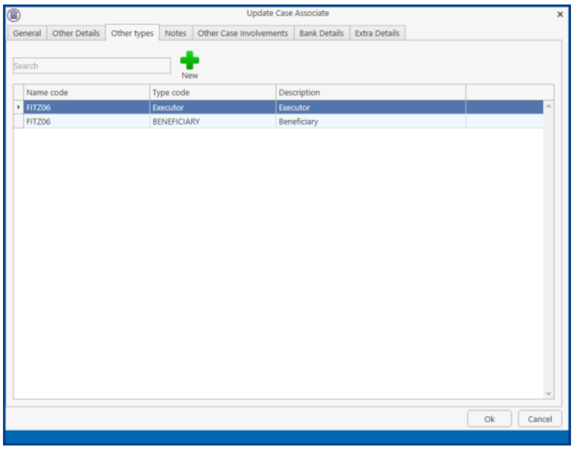
2. Click on the **New** Button and the following screen will appear.



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



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



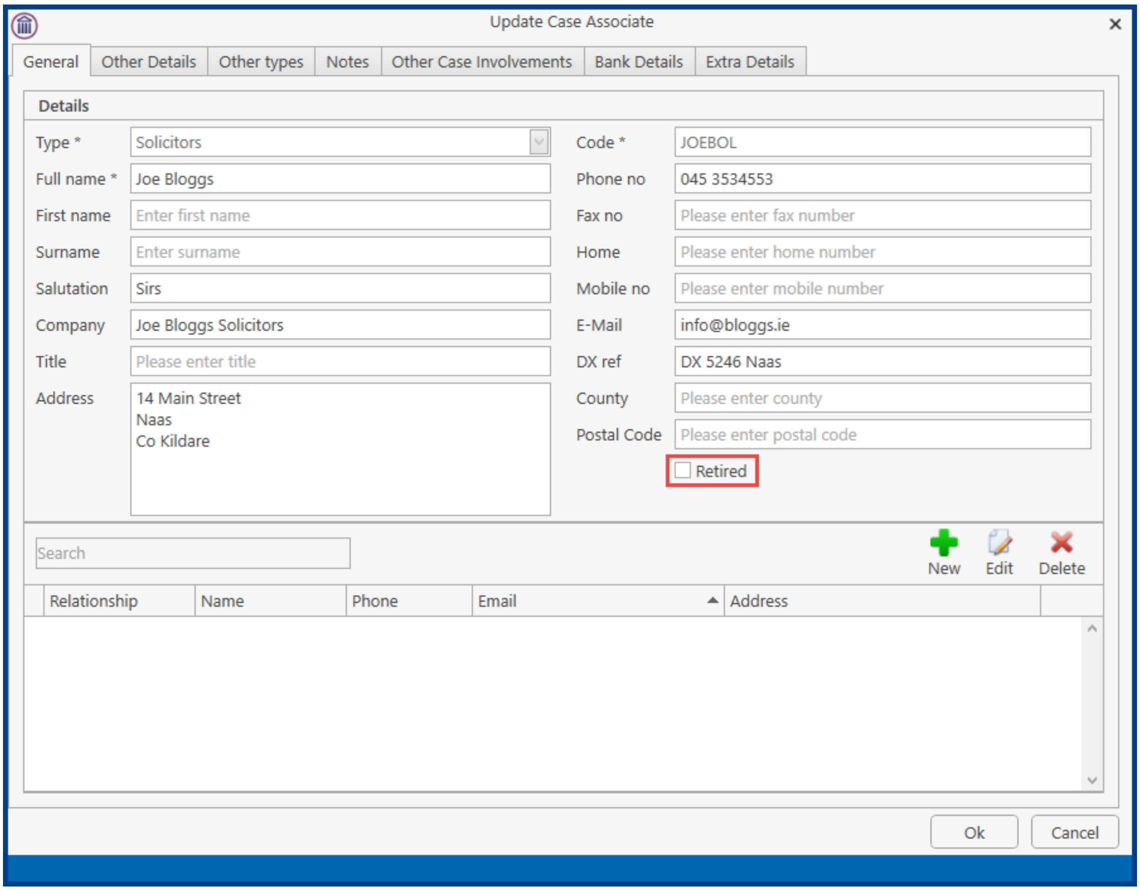
5. Click **OK**.

Maintaining unwanted Case Associates

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

Retire a Case Associate

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

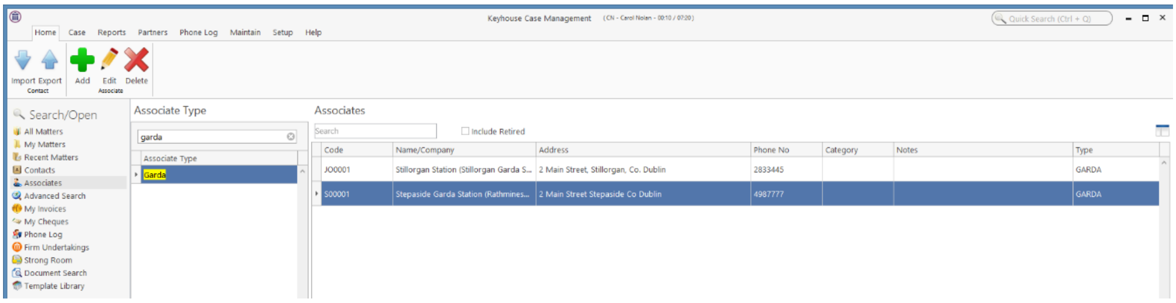


2. Tick the **Retired** box and click **OK**. The associate will no longer be available for selection.

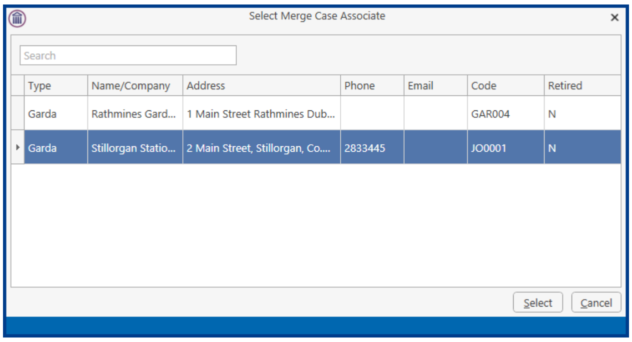
Merge Case Associates

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

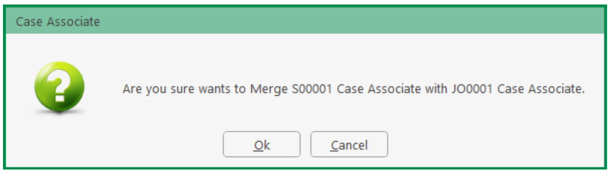
1. Open the **Associate Type** concerned.



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



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

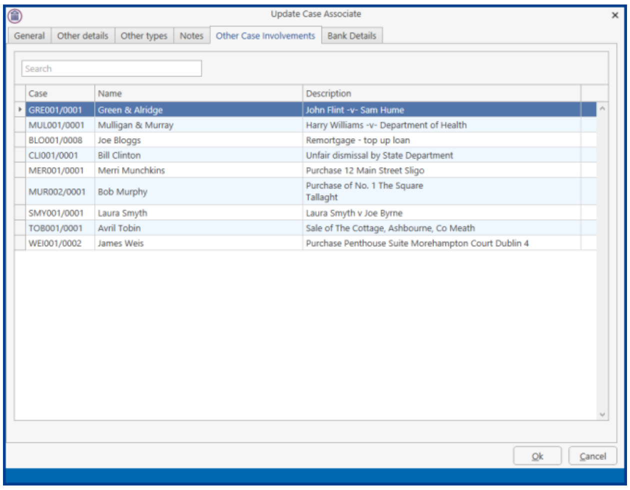


4. All matters have now been linked to the merged case associate.

Delete a Case Associate

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

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



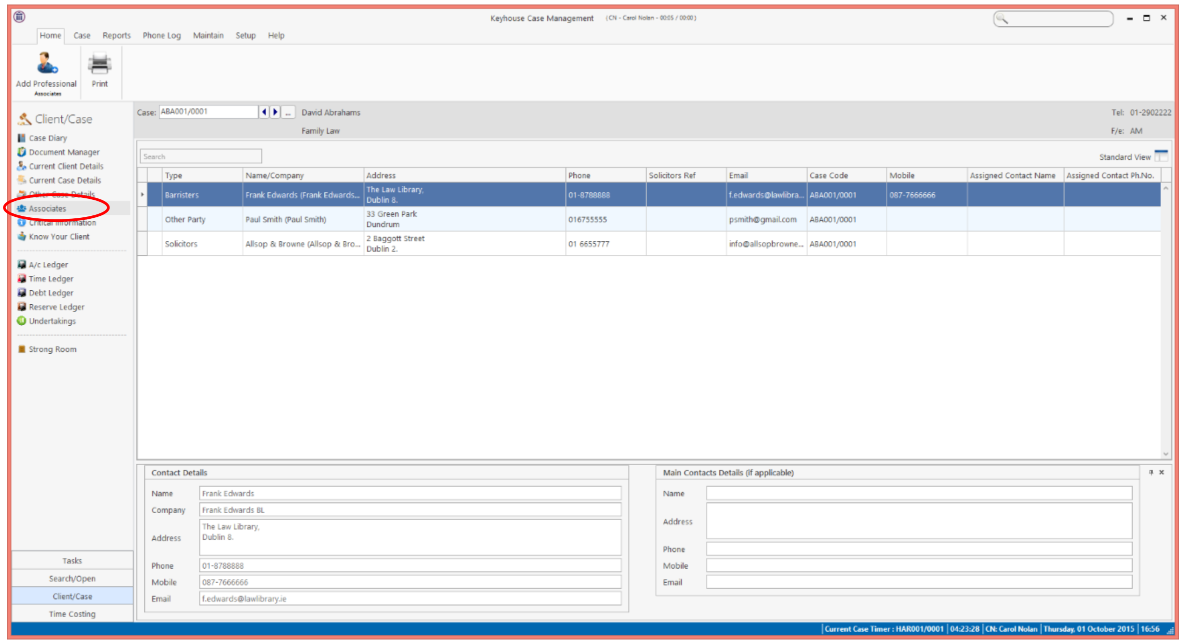
2. A list of all matters associated with the **Associate** will be listed.

3. Move **each** matter to an alternative Associate.

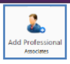
4. Once all have been moved, right click on the associate and select **Delete**.

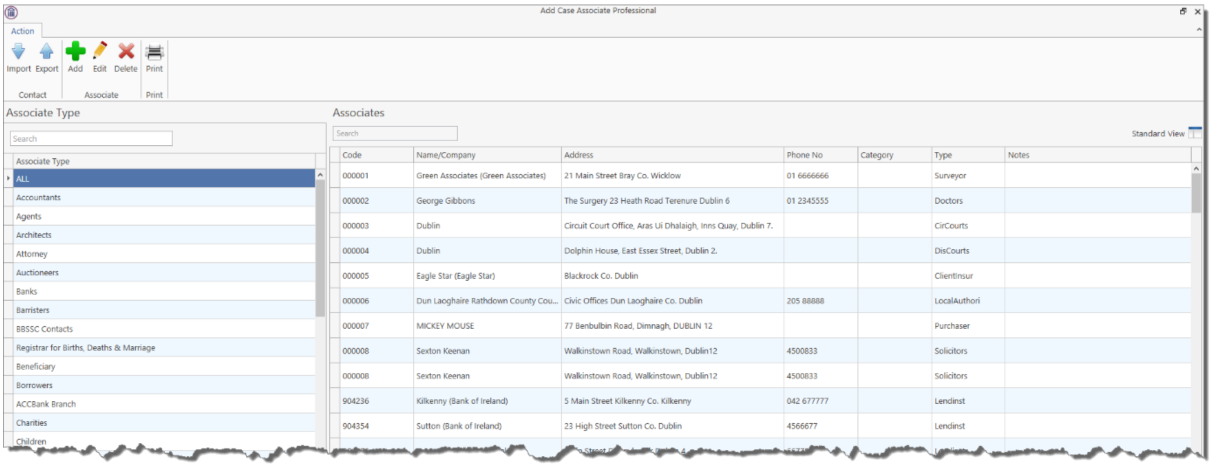
How to add an existing Case Associate to a case

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

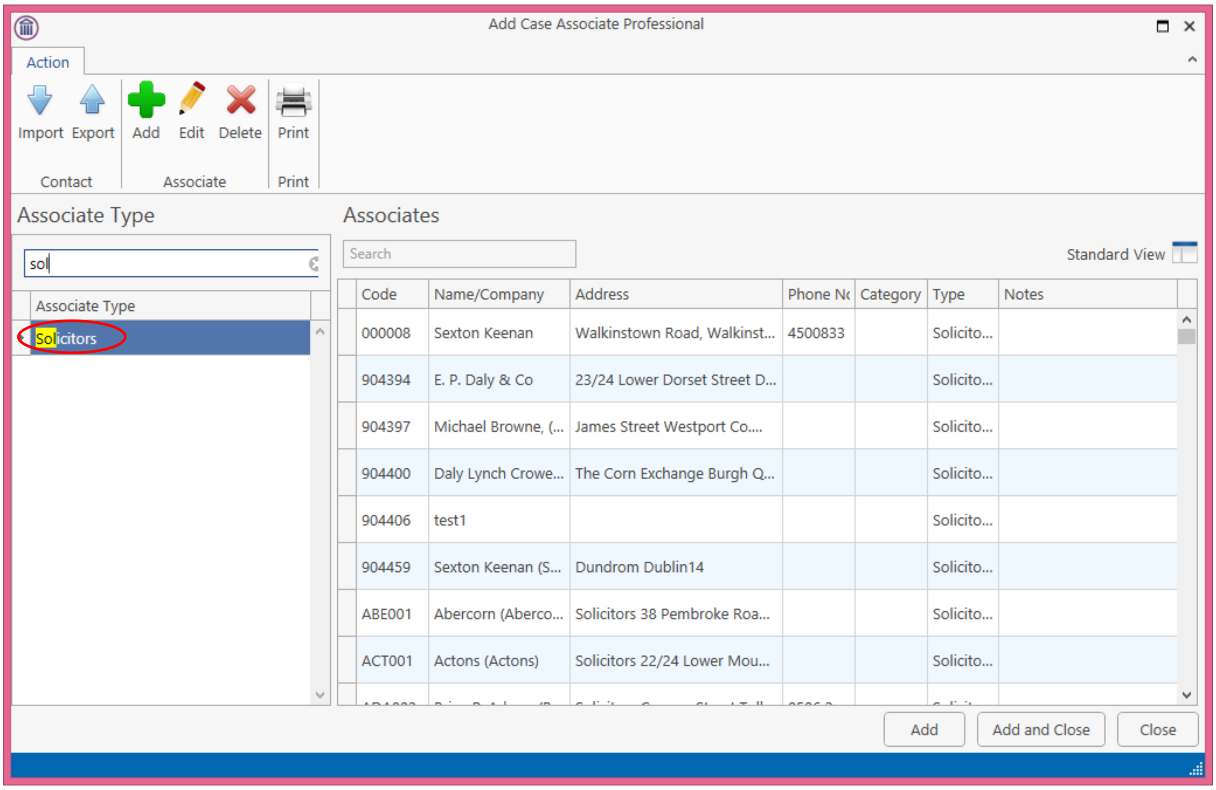


2. Click on **Associates** on the **Navigation** panel: a list of case associates assigned to case will appear.

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



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



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

6. Select the solicitor required and click **Add**. Once all the associates are attached, click **Close**.

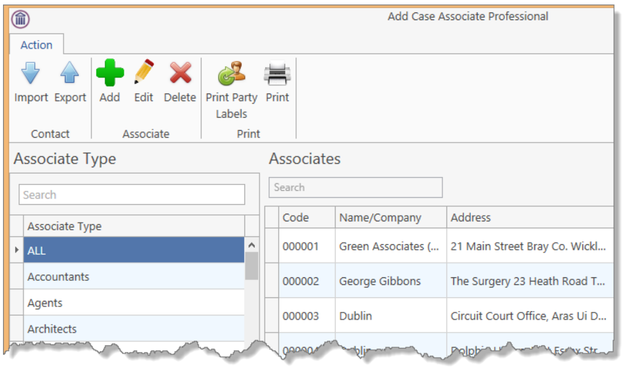
NOTE: You can also sort the columns by clicking on the column headings in the Case Associate Screen.

How to add a New Case Associate to a Case

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

2. Click on **Associates** on the **Navigation** panel

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



4. Check the **Category** of case is correct e.g. Bank.

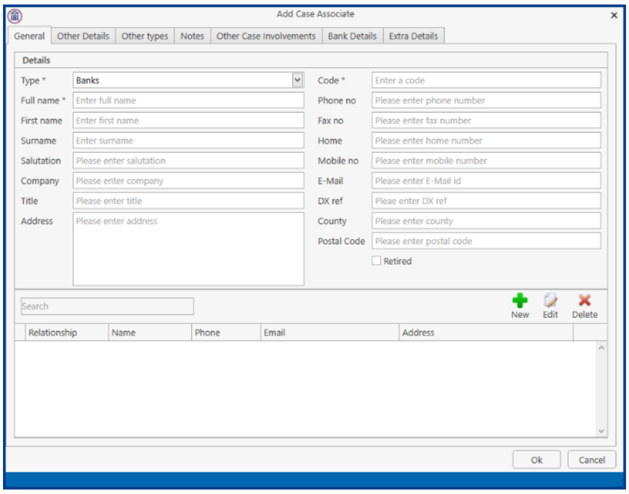
5. Alternatively, click in the **search box** and **input** a key search word the search criteria will be applied as you type.

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

7. Then click on the **green plus** 

the following screen will appear.

8. **Input** the relevant information



Full Name: Input the Full Name

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

Salutation: Input the Salutation

Company: Input the company name

Title: Input the title i.e. Mr, Mrs etc.

Address: Input the address

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

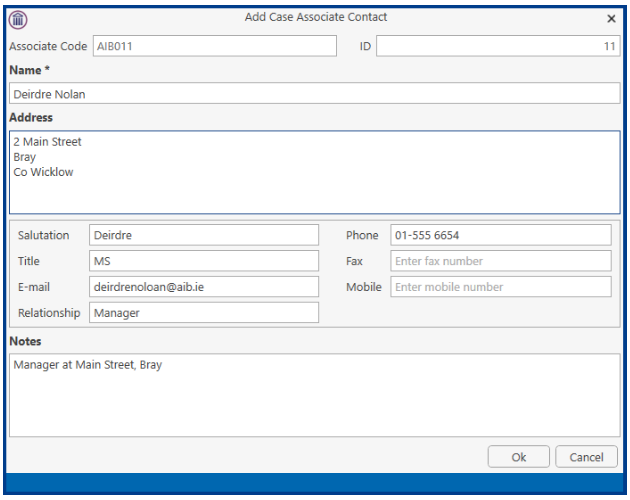
Phone No: Input the main phone number

Fax No: Input the fax number

Home: Input home phone number

Mobile: Input mobile phone number

E-Mail: Input e-mail address



DX Ref: Input the Document Exchange reference if applicable

Nominated: Tick is this is the nominated contact.

County: Input the county.

Post Code: Input the post code.

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

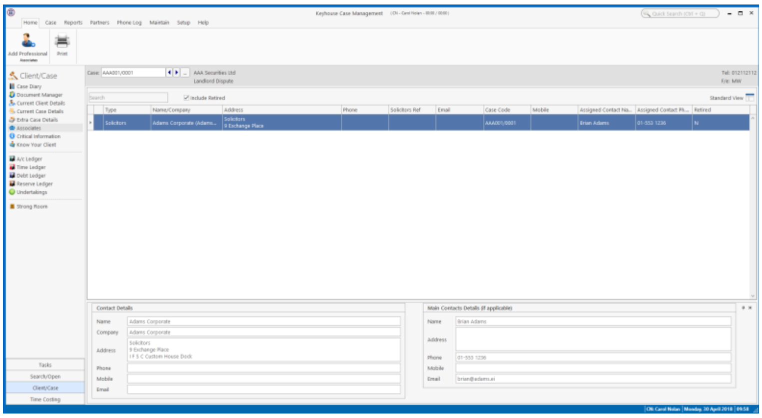
9. If you want to add a **Contact** to this associate, click on **New** 

the following window will appear.

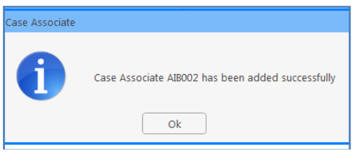
 Input the following details as required:

Name	Address
Salutation	Title
Email	Relationship
Phone Number	Fax Number
Notes	

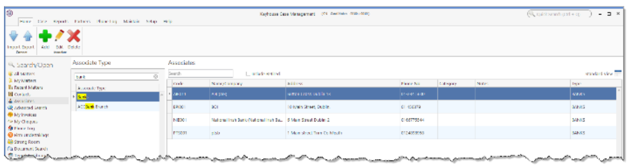
10. Click **OK** to save**.** You will return then to the **Add Case Associate** window. The contact will then appear at the bottom of the window see the following example.



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

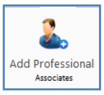


12. Click **OK**. The Case Associate will then appear in the full list.



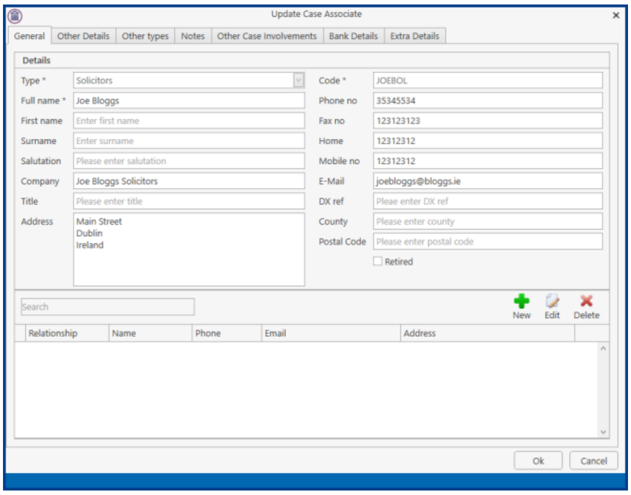
13. Then **Double click** the new associate from the list to assign to this case. The contact will then be assigned to the case and will appear in the case associate screen of this matter.

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** 

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 dialog box will appear.

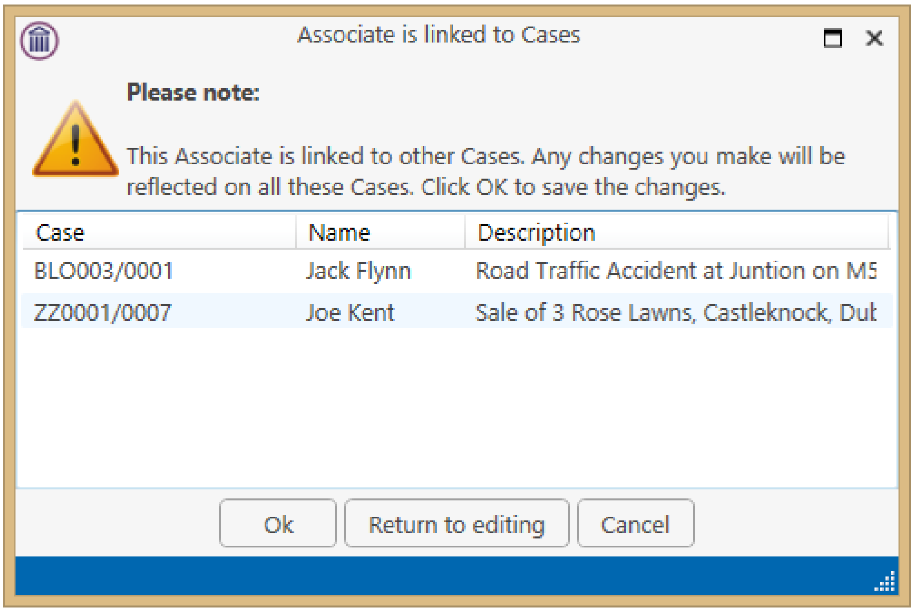


8. Click on each ***tab*** and amend the details as required.

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.
Bank Details	Click to **Bank Details** to add the associates banking information if required.
Extra Details	Click to **Extra Details** to add and edit AUD fields for the associate.

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

10. A warning message will appear if the information changes impacts other cases that the associate is attached to.



11. Click OK to save the changes, Return to editing will enable further changes to be made, Cancel removes any changes made.

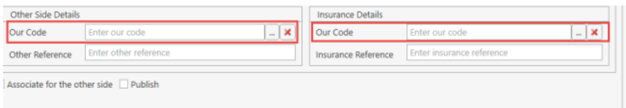
How to Link Case Associates in a Case

There may be a link between case associates e.g. defendants to solicitors and this link can be set in the case associates.

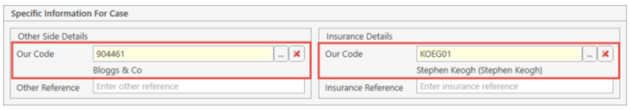
1. **Open** the Case Associates from the **Case**.

2. Go to the **Specific Information For Case** section on the General Tab.

3. The option is available in both the **Other Side Details** and **Insurance Details** using the **Our Code** Field.

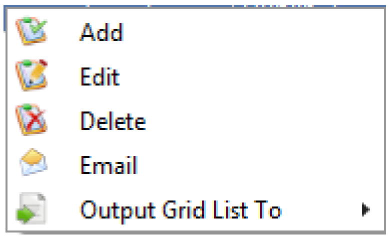


4. Click on the **Browse** Button and select the linked associate.



5. Click **OK** to save and close the window.

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.

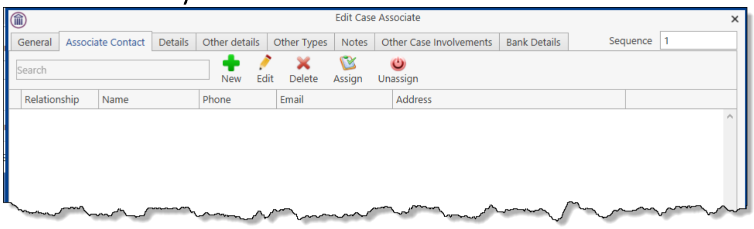
> **NOTE:** To delete a case associate completely first remove it from all cases and then delete it from the case associate database. It is not possible to delete a case associate while it is assigned to any case.

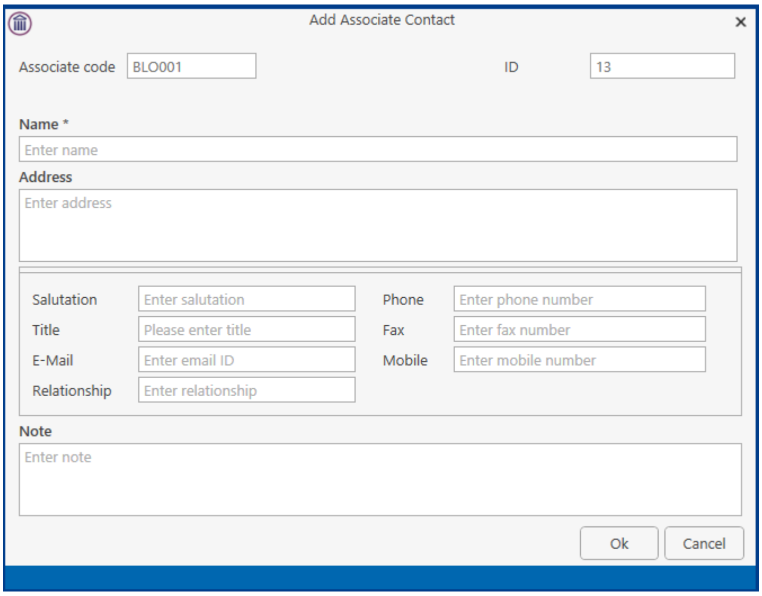
How to add a Contact to a Case Associate

1. Open the required Associate in the Case.

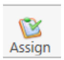
2. Select the Associate Contact Tab and click on the Green Cross 

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.



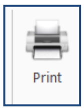


4. Click Ok.

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

Print Options

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



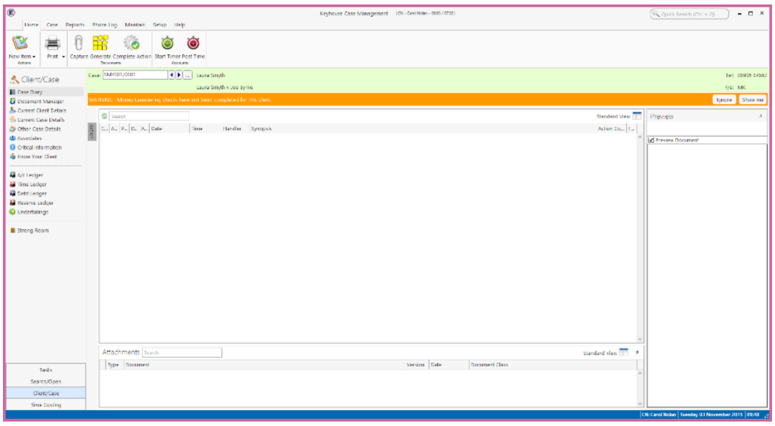
Click on **Print** to print a report of Case Associates on the Case.

Generating Tasks

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

How to Generate a Task

1. Open a case in the Case Diary



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

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

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

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

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

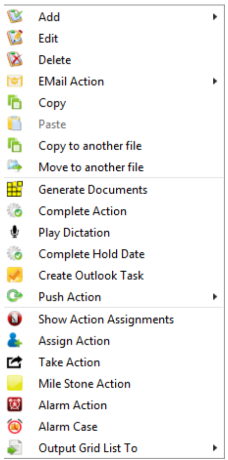
1) Click on the task to select it.

2) Click on **Generate**  on the case diary toolbar.

Or

1) **Right click** on the task

2) Select **Generate Documents** from the pop-up menu.



To Complete A Task

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

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

Or

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

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

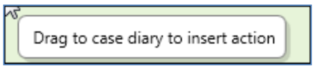
2) Click on **Complete Hold Date** to complete the action with the same date as it was generated.

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

Working with Tasks in the Case Diary

How to Insert Tasks in the Case Diary

1. To insert a task into the diary, **Click and Drag** the task from the Workflow to the case diary window. The following will appear as you drag it.



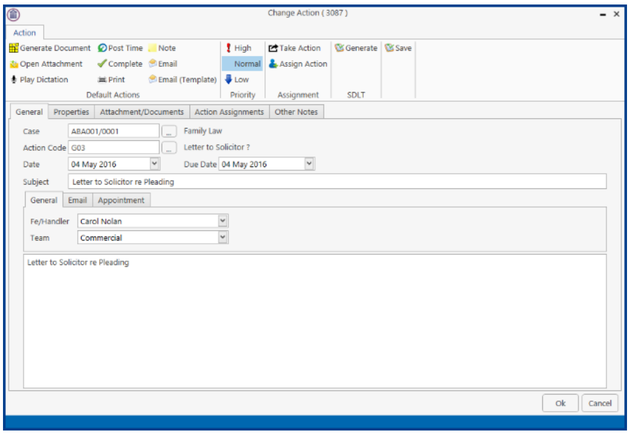
2. **Double Click** the Task and change the date for processing, the subject etc., as required

3. Click **OK**.

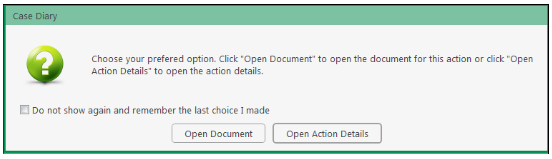
Changing Tasks

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

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



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



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

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

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

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

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

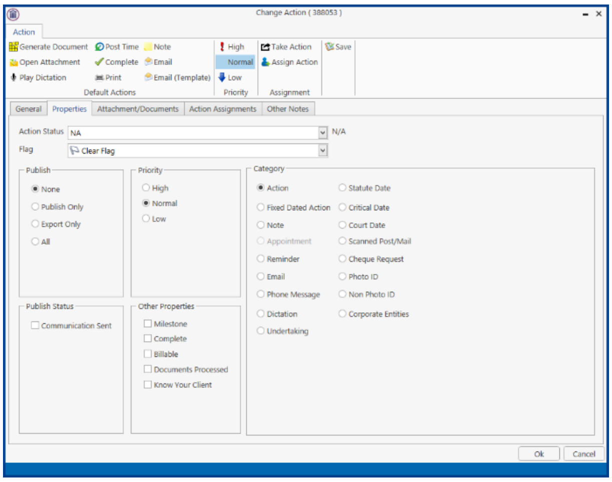
Due Date: Click on the **down arrow** to reveal a calendar click on the required due date.

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

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

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

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



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

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

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

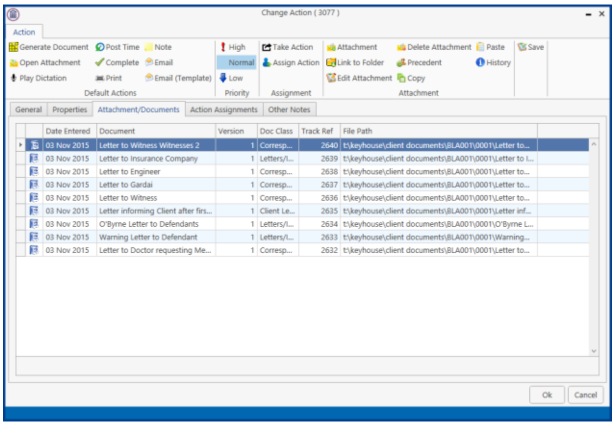
Priority: **Select** the appropriate priority status.

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

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

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

The following actions can be performed in this window

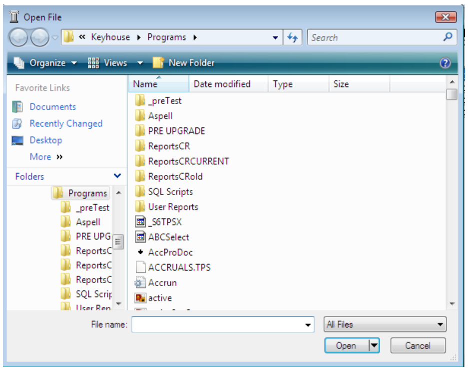


Open an attachment

i. **Double Click** on the attachment you want to open.

ii. Or Click on **Open Attachment** Open Attachment.

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



Add an attachment to a task

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

ii. Click on the **Attachment** option. Attachment The following dialog box will appear.

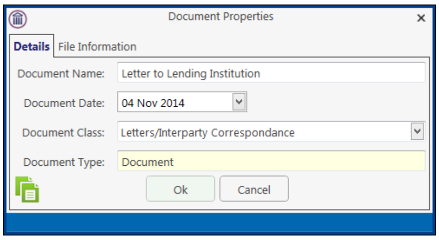
iii. **Browse** and locate the required document.

iv. Click **OK**. The document will now appear in the attachment list.

Amend an attachment's properties

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

ii. Click on the **edit attachment** Edit Attachment located on the toolbar. The following dialog box will appear.



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

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

v. **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.

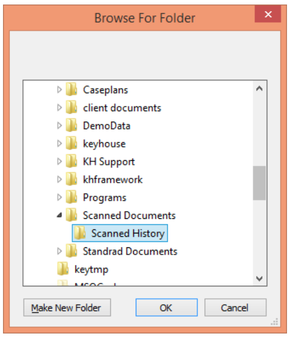
i. Click **OK** to save the changes.

Link to Folder

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

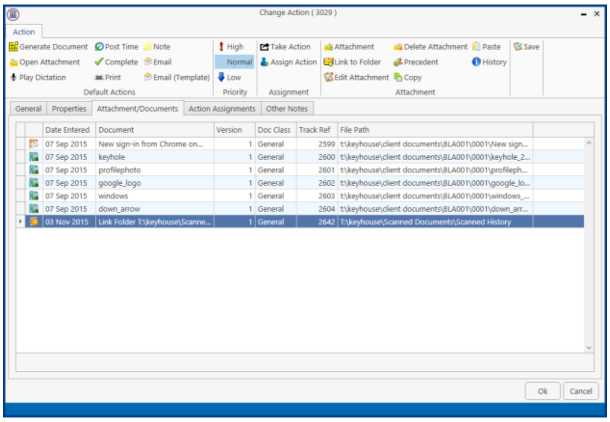
ii. Click on the **Link to Folder** button. Link to Folder

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



iv. Click **OK**.

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



Delete an attachment

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

ii. Click on **delete attachment.** 

.

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

Copy and Paste an attachment

i. Select the attachment you want to copy.

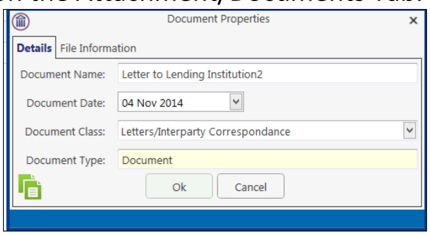
ii. Click on **Copy.** 

.

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

iv. Click **Paste** 

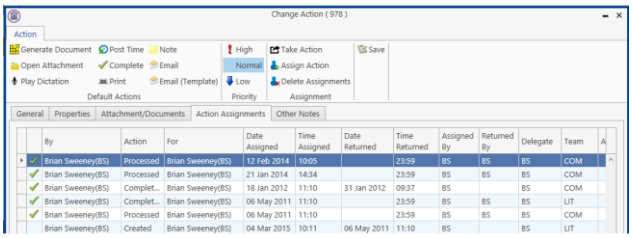
. The following attachment properties box will appear.



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.



Copy and Paste multiple attachments from the Case Diary

i. From the Attachment section on the Case Diary Screen select the document to be copied.

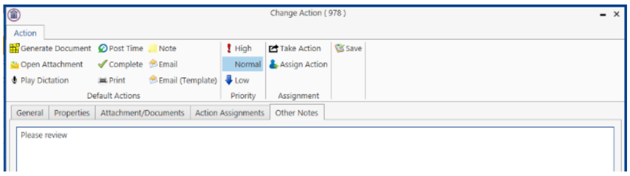
ii. Right click and select Copy

iii. Move to the new action and open the action

iv. Click to the Attachment/Document Tab and follow the steps from point iv. above.

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

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



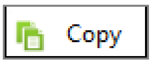
3. Click **OK** to save any changes made.

Deleting a Task

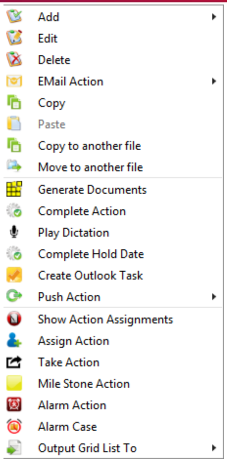
1. **Right Click** on the **task** in the **case diary** the following menu will appear.
2. Click on **Delete.** 

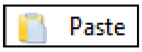
3. You will be asked to confirm the deletion. Click **Yes**. If the task has been generated, you will be asked if you want to delete the documents generated. If you click the **Yes** button, the documents will be deleted.

Copying a Task

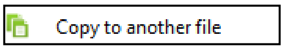
1. **Right Click** on the **task** in the **case diary**: the menu above will appear.
2. Click on **Copy.** 

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



4. Click on Paste. 

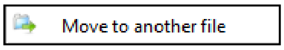
Copying a Task to another matter

1. **Right Click** on the **task** in the **case diary**: the menu above will appear.
2. Click on **Copy to another matter.** 

3. A list of cases will appear search for the required case.
4. Then **Double click** to select.

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

Moving a Task to another matter

1. **Right Click** on the **task** in the **case diary**: the menu above will appear.
2. Click on **Move to another matter.** 

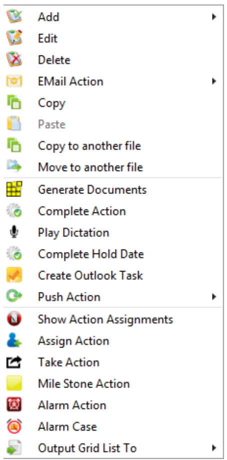
3. A list of cases will appear search for the required case.
4. Then **Double click** to select.

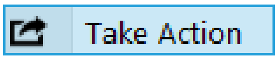
> **NOTE:** You will automatically move to the case diary of the case selected.

TIP: TO DELETE, MOVE OR COPY MULTIPLE TASKS:

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

Taking a Task from Another Handler



1. **Right click** on the task the following menu will appear**.**
2. Click on **Take Action** 

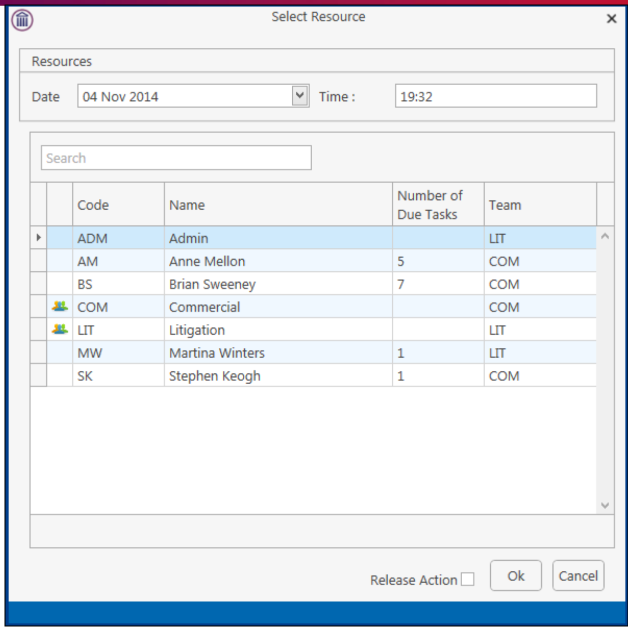
3. The action will now appear in the user's name.
4. To take multiple actions in a Case Diary at the same time, select all the actions and then take them by right clicking on any of the selected actions and right clicking.

Assigning a Task to Another Handler

1. **Right click** on a task the following menu will appear.
2. Click on **Assign** Action. 

3. A screen will appear listing all **resources**.
4. Double Click on the **resource** person you want to assign the task.
5. Check the **Release Action** box to remove the task completely from your task list.

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



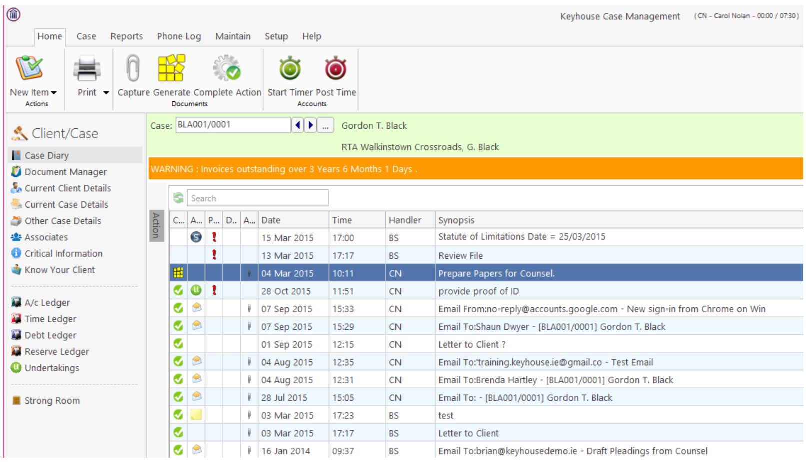
> **Note** The owner of the task is the only person who can mark the task as complete. This allows you to assign a task to another handler but ensures you have control over the task.
>
> **Note** Assignments can only be deleted by the user who created the assignment.

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

Searching, Sorting and Filtering the Case Diary

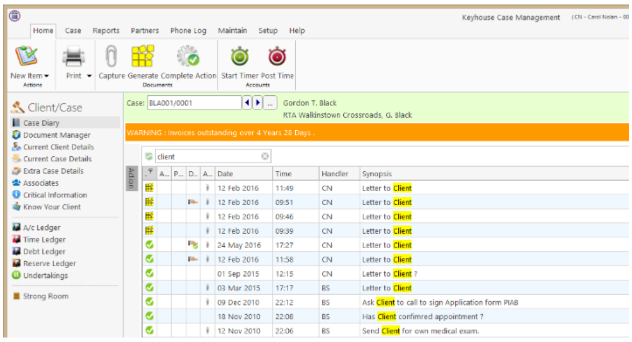
How to Search the Case Diary

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



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

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



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.

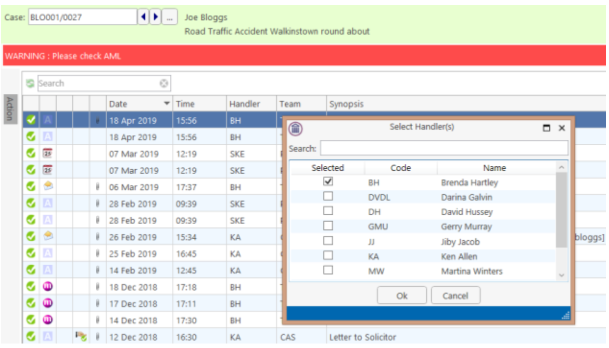
How to filter Case Diary Columns

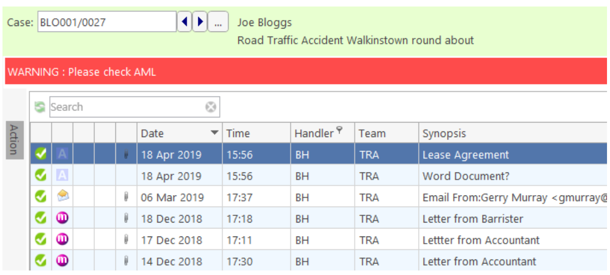
1. Open a case in the **Case Diary**.

2. To see the columns that can be filtered, move the mouse across the header row. A Pin will be visible in the columns that can be filtered. Handler

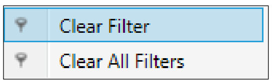
3. Move your mouse to the required **column heading**.

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





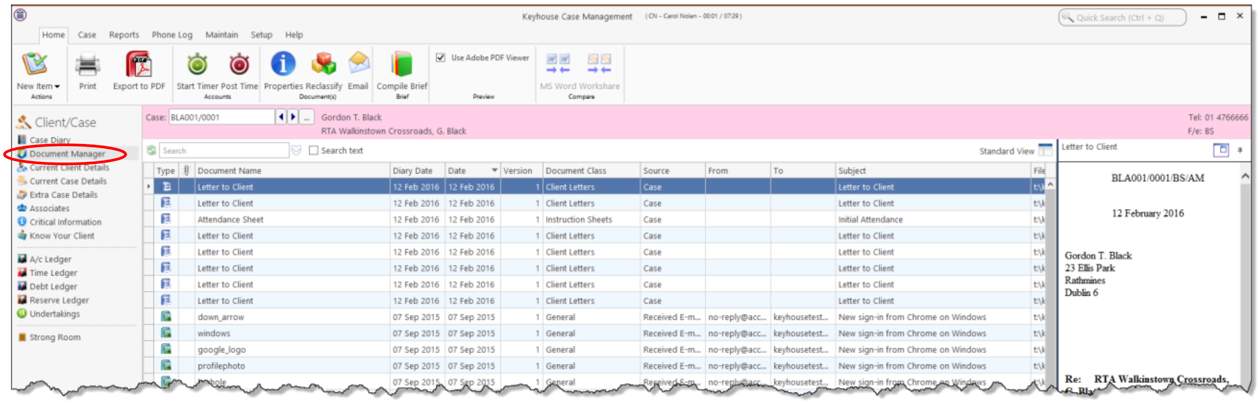
5. To remove the filter, right click on the pin and select Clear Filter or Clear all Filters



How to view all documents on a case

1. Open a case in the case diary.

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

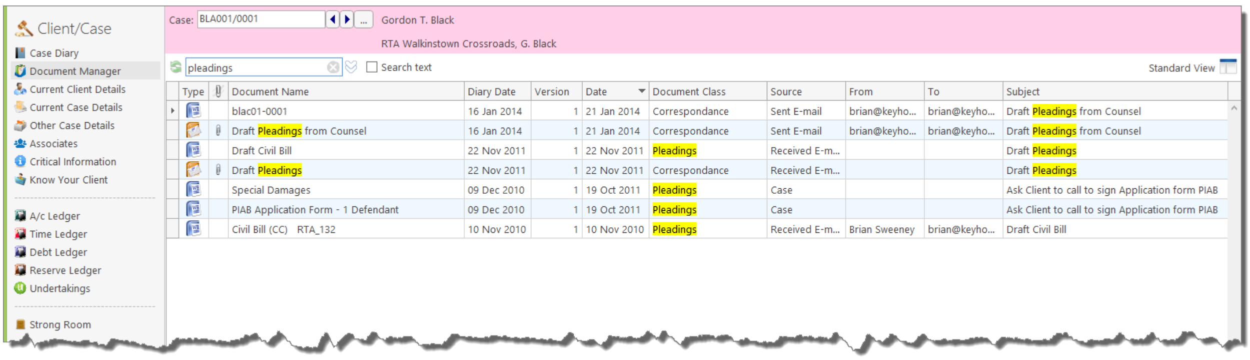


How to search for a document on a case

1. Click on **Document Manager** in the navigation bar**.**

2. **Input** the key search words in the **Search box** provided the search criteria will be applied as you type.

3. A **list** of documents containing that word will appear.



4. **Click** on a document to view in the preview pane.

5. **Double click** to the open the document.

> **NOTE:** For information on the Document Manager see Chapter 5.

Processing Documents using the Clarion Generator

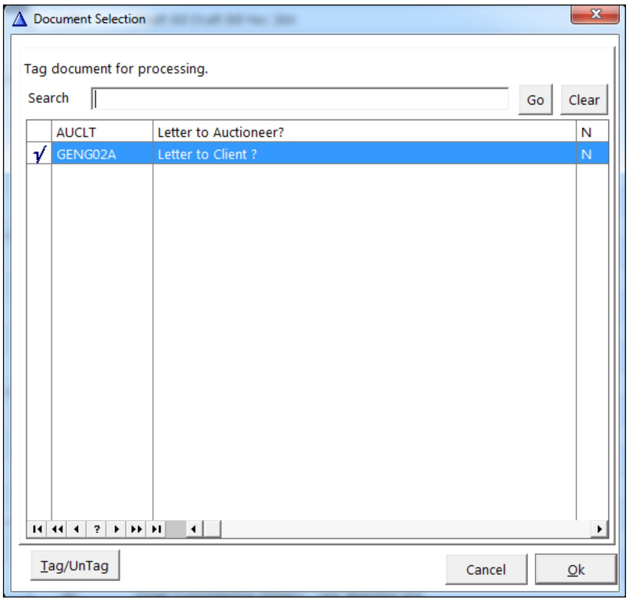
When a task is generated any precedents connected with the task are processed. Depending on how the documents have been set up, different requests are made of the user.

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:

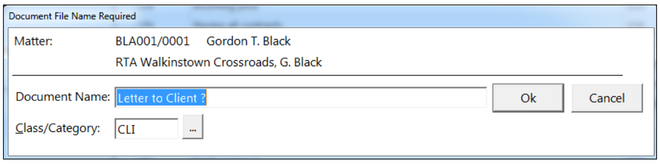
1. A **Document Selection** dialog box will appear.

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. A dialog 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.

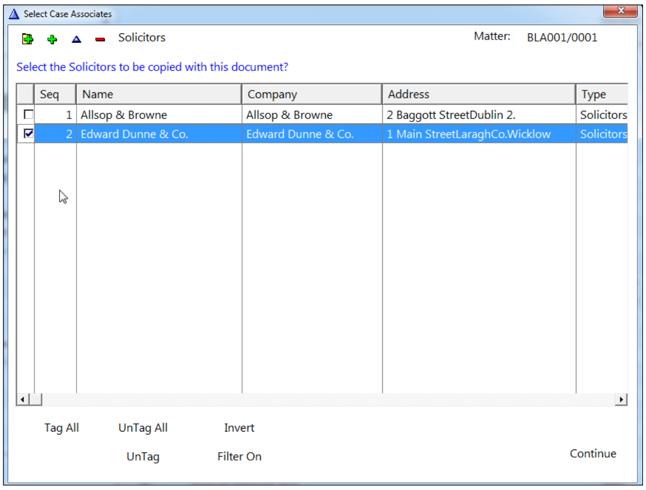
3. Click **OK**.

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.

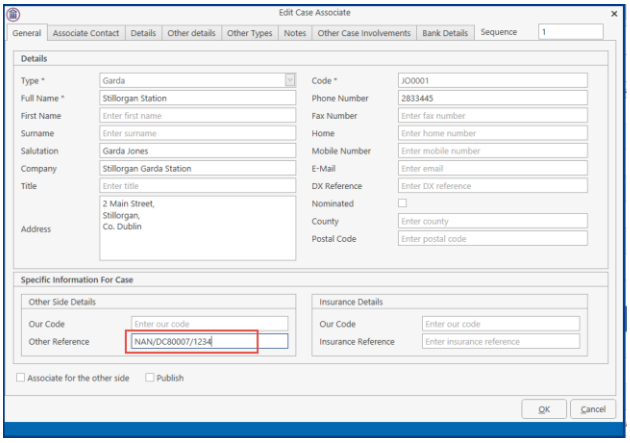


Example 1: Letter to Solicitor- Searching and Selecting an existing case associate

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

1. The following dialog box has appeared requesting the user to select a Solicitor for this letter.

2. There are two solicitors assigned to this case, you can tag the solicitor provided then click on the **amend** button Change to add a reference.



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

4. Or if the solicitor displayed is not the solicitor you want to write to click on the **green plus with the yellow folder** and add the new case associate as previous outlined in the section on "**How to Add a new Case Associate".**

5. A screen will reappear listing the solicitors on the case.

6. Check the appropriate box(es) to **tag** the required solicitor(s).

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

7. Click **Continue**.

8. Word will open displaying the letter to solicitor.

9. **Edit** the document in Word as normal as required.

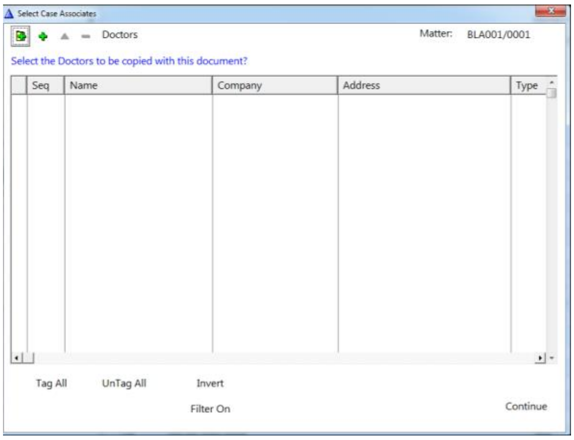
10. **Save** any changes and **Print** as required.

11. The action/task and document will then be present in the **Case Diary** for future review.

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

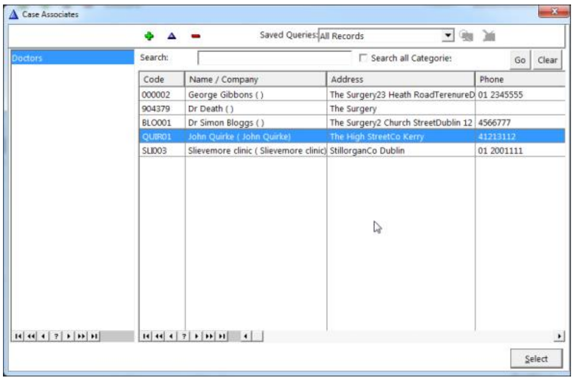
In the following example the document being processed is a letter to Doctor, the Doctor is not present in the case associates so he needs to be added to the list of doctors and assigned to the case.

1. The following dialog box has appeared requesting the user to select a Doctor for this letter.



2. No doctors have been assigned to this case so the user needs to add one.

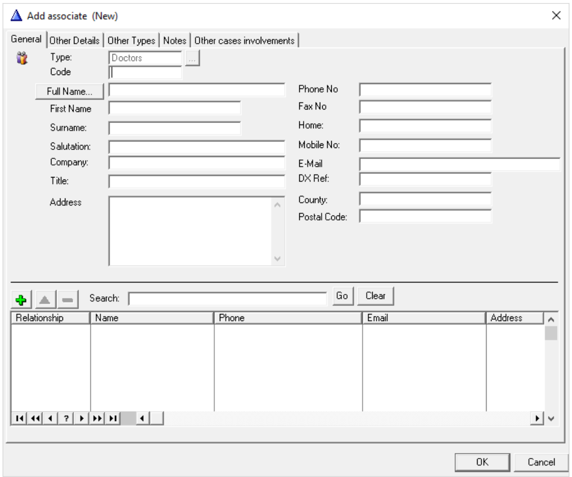
3. Click on the **Green Plus with the yellow folder** and the following screen will appear.



4. Highlight the doctor required and click Select . If the doctor you require is not in the list then click Green Plus

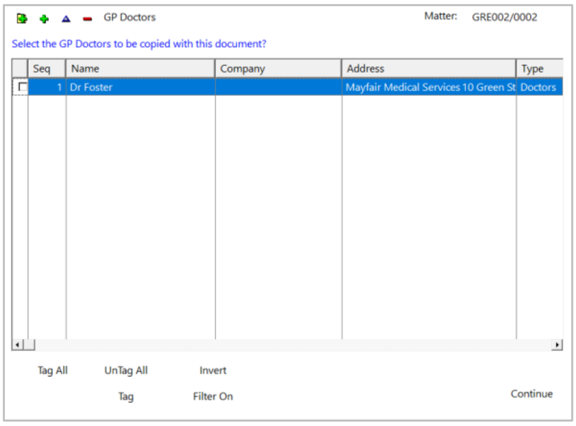
   Remember to always perform a search to ensure the case associate is not already on the system.

5. Complete the screen with all relevant information and click OK



6. The doctor will now be visible in the list.

7. Highlight the doctor and click Select . The following screen will reappear listing the doctor assigned to the case.



8. Using the tick boxes provided **tag** the required Doctor and click **Continue**.

9. Word will open showing the letter to doctor

10. **Edit** the document in Word as normal as required.

11. **Save** any changes and **Print** as required.

12. The task and document will then be available in the Keyhouse Case Diary for further review.

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

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

1. Word opens automatically displaying a letter to lending institution the information regarding the case and case associate i.e. the lending institution is inserted automatically. No information is requested as it has already been added to the case associates.

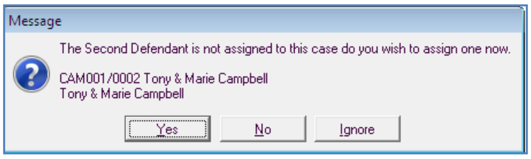
2. **Edit** the document in Word as normal if required.

3. **Save** any changes and **Print** as required.

4. The action/task and document will then be present in the Keyhouse Case Diary for future review.

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

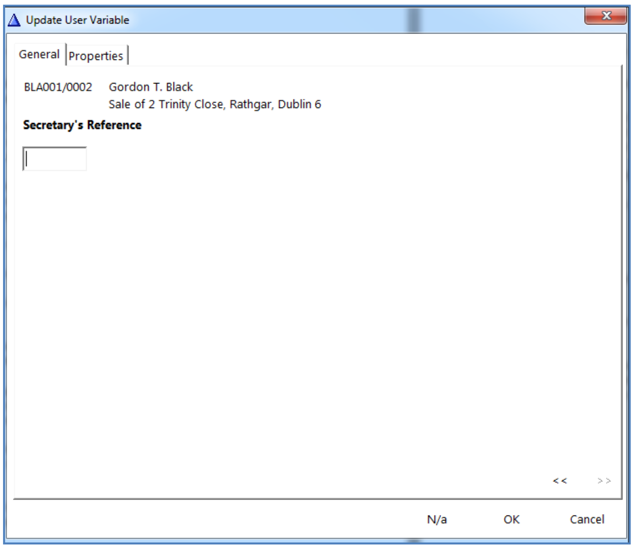
2. Word opens automatically displaying the warning letter, the information regarding the case and case associate is inserted.

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 and AUD Questions

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



Example of UDF Question: Sale Price of Property

1. Input the answer in the input box provided.

2. Click **OK**.

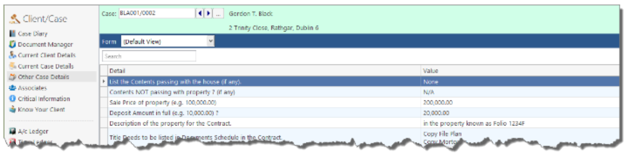
3. If the question is not applicable click **N/A**.

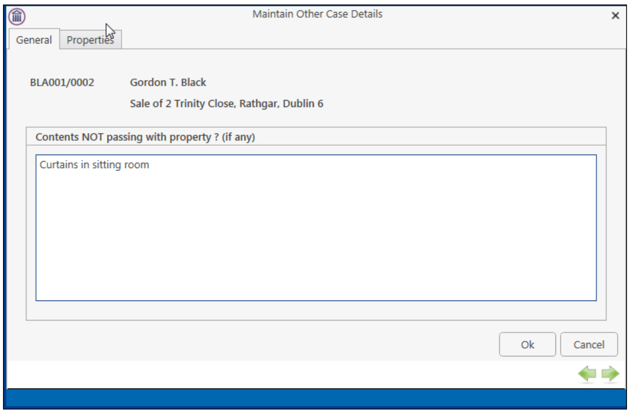
4. The answer is then inserted in the Word document.

5. The answer will be stored in the **extra case details screen**.

6. To amend click on the extra case details shortcut 

available on the case diary navigation panel. The following screen will appear.





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

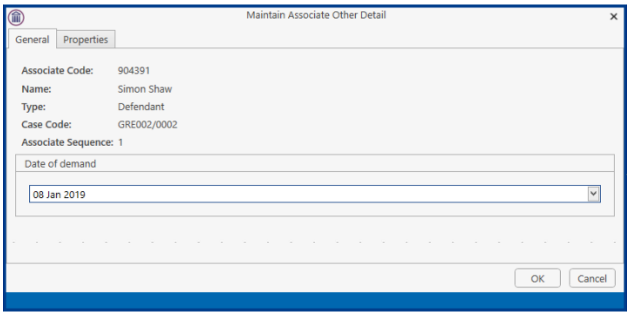
AUD fields relate to the Case Associates. These fields can be populated as the associate is added to a matter or can be populated as the document is generated. They are answered in the same way as UDF fields when done through the document.

1. To amend the AUD fields, open the case associate on the matter.

2. Click to the Extra Details Tab.

3. Click Change to open the field

4. Make the required change and click OK.



Processing Documents using the Integrated Document Generator

The new .Net Generator makes the generation of documents fast and more efficient. However, users will still have the option to use the existing document generation software.

To use the new software, ensure it has been activated by the System Administrator. If you have the option to choose whether to use it, then you will need to activate it in your Personal Settings.

As with the traditional generator:

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 specific document

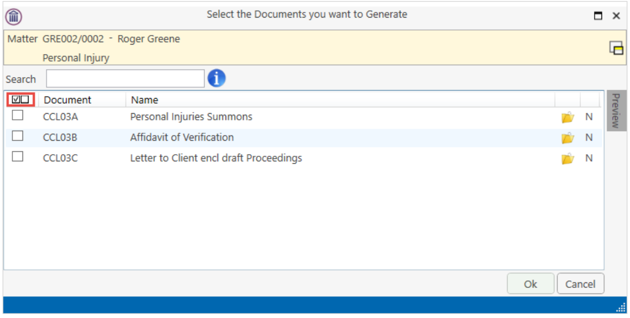
Select Documents to be processed

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** dialog box will appear.

2. **Tag** the documents you want to process by putting a tick next to each document that is to be generated. Alternatively, click on the Tick to select all the documents

3. Click **OK** and the documents tagged will be generated.

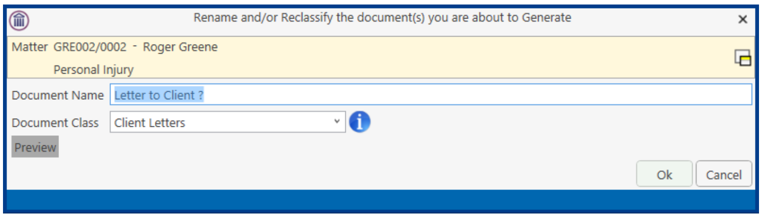


Naming and classifying a Document

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

1. A dialog box will appear requesting the user to input a document name. **Input** an appropriate name.

2. Click Preview to see the document before it is generated.



3. To classify a document, click the **down arrow** and select a document class e.g. Pleadings.

4. Click **OK**.

5. The system may pause and request information, for example, Case Associates or specific questions pertaining to the document.

6. The documents will then be created and displayed in Word ready for printing etc. The documents are saved and stored in the Keyhouse system.

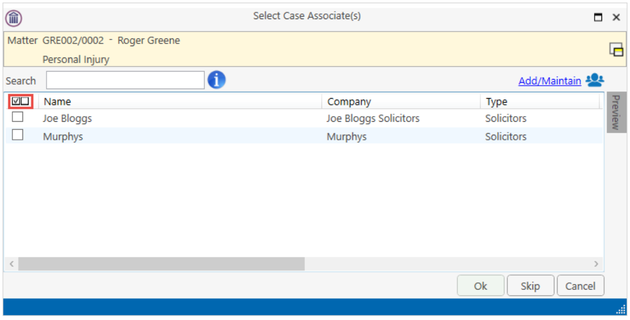
Adding Case Associates when generating a document

The new Document Generator also facilitates the adding of Associates while generating documents.

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 dialog box has appeared requesting the user to select a Solicitor for this letter.



2. If the solicitor displayed is not the solicitor, you want to write to click on the **Add/Maintain** button 

and add the new case associate as previous outlined in the section on "**How to Add a new Case Associate".**

3. A screen will reappear listing the solicitors on the case.

4. Check the appropriate box(es) to **tag** the required solicitor(s) or click on the Tick to select all associates in the list.

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

5. Click **OK**.

6. Word will open displaying the letter to solicitor.

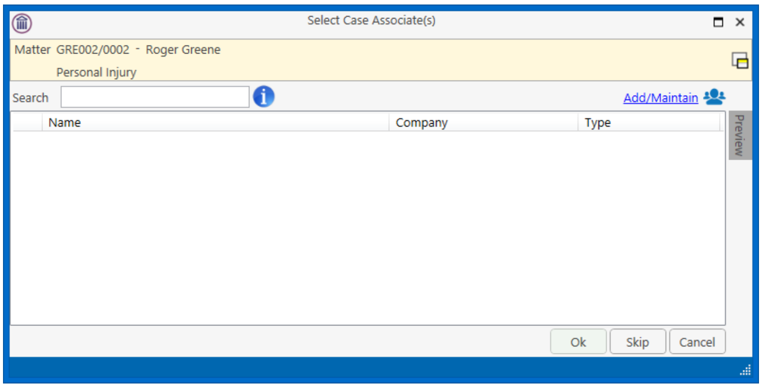
7. **Edit** the document in Word as normal as required.

8. **Save** any changes and **Print** as required.

9. The action/task and document will then be present in the **Case Diary** for future review.

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

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



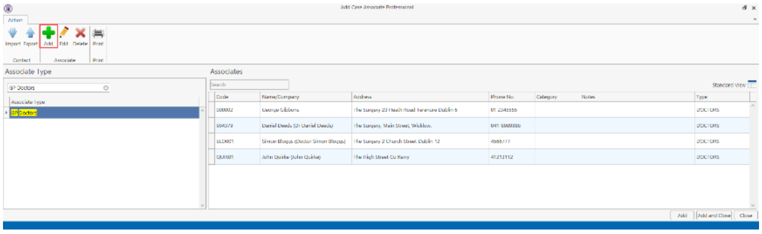
1. The following dialog box has appeared requesting the user to select a Doctor for this letter.

2. No doctors have been assigned to this case so the user needs to add one.

3. Click on the **Add/Maintain** button 

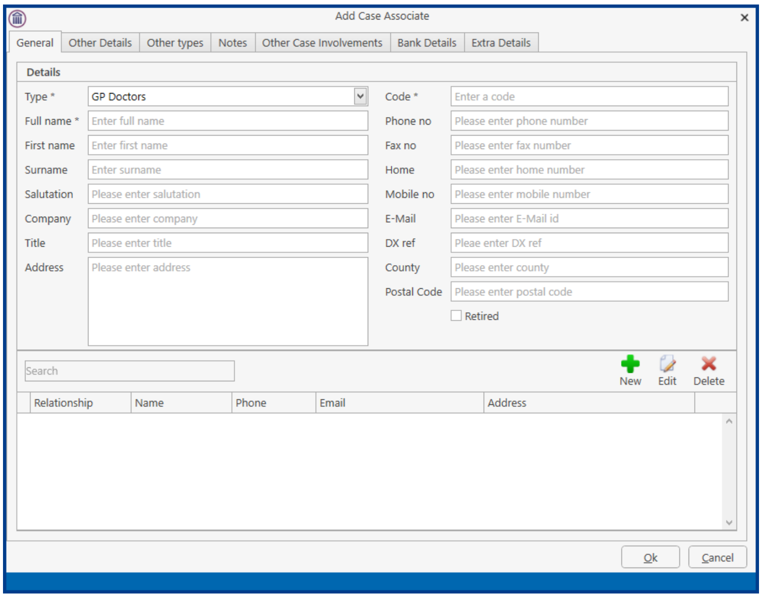
and the following screen will appear.

4. Highlight the doctor required and click **Add and Close.** If the doctor you require is not in the list then click Green Plus Add

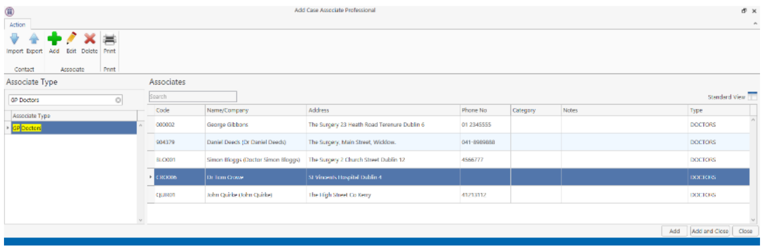


> **Remember** to always perform a search to ensure the case associate is not already on the system.

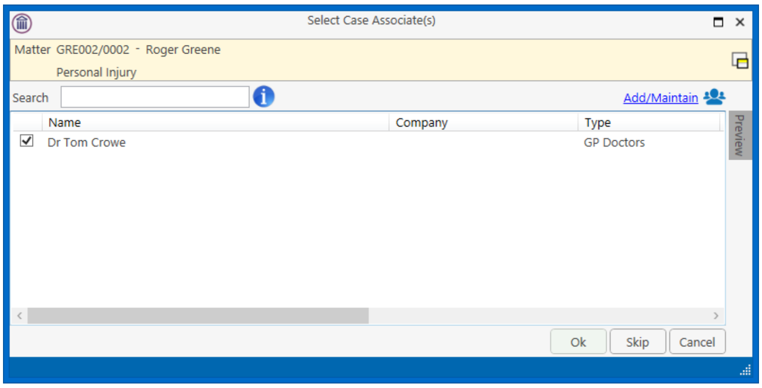
5. Complete the screen with all relevant information and click OK



6. The doctor will now be visible in the list.
7. Highlight the doctor and click **Add and Close.**
8. The following screen will reappear listing the doctor assigned to the case.



9. Using the tick boxes provided **tag** the required Doctor and click **OK**.



10. Word will open showing the letter to doctor
11. **Edit** the document in Word as normal as required.
12. **Save** any changes and **Print** as required.
13. The task and document will then be available in the Keyhouse Case Diary for further review.

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

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

1. Word opens automatically displaying a letter to lending institution the information regarding the case and case associate i.e. the lending institution is inserted automatically. No information is requested as it has already been added to the case associates.

2. **Edit** the document in Word as normal if required.

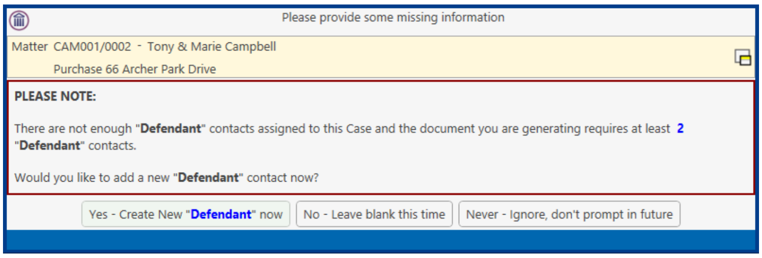
3. **Save** any changes and **Print** as required.

4. The action/task and document will then be present in the Keyhouse Case Diary for future review.

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

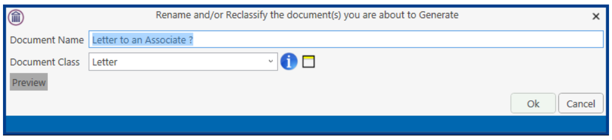
3. **Edit, Save** and **Print** in Word as normal.

4. The action/task and document will then be present in the **Case Diary** for future review.

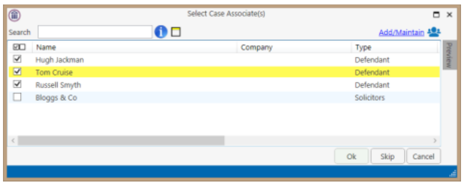
Example 5: Letter to an Associate – where the user can choose any associate from the list of associates on the matter.

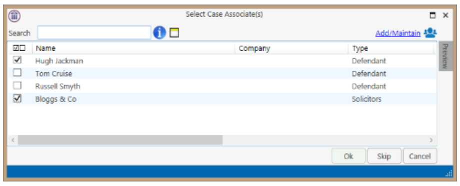
In the following example a letter can created for any associate that has been added to the matter and also gives the user the opportunity to add additional associates to the matter.

1. Select and generate the letter, ensuring that the name is changed to reflect who the letter is to



2. Select the **Associates** from the list and click OK. If additional associates are required, click the **Add/Maintain** button and add in the normal way.





3. **Individual** letters will be created for each selected Associate.

4. **Edit** the document in Word as normal as required.

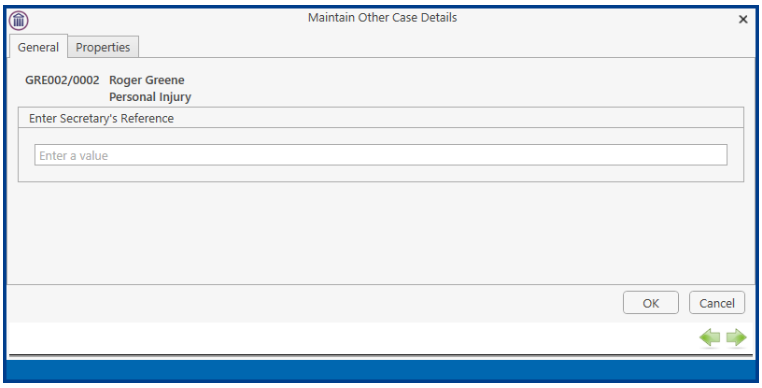
5. **Save** any changes and **Print** as required.

6. The task and document will then be available in the Keyhouse Case Diary for further 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

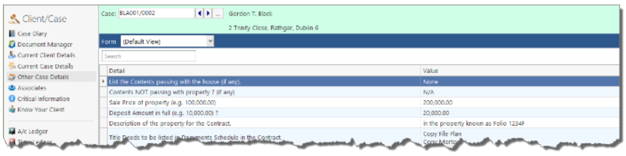


1. **Input** the answer in the input box provided.

2. Click **OK**.

3. If the question is not applicable click **Cancel**

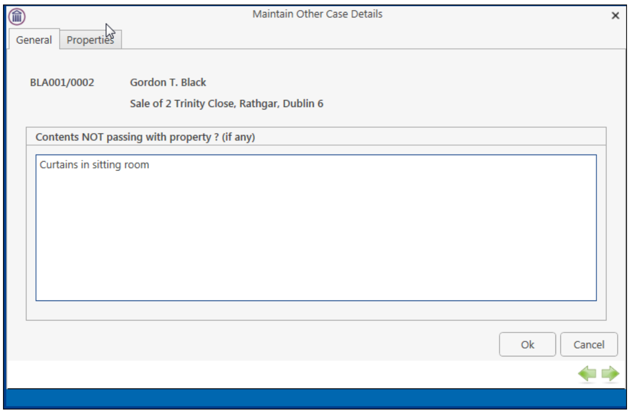
4. The answer is then inserted in the Word document.



5. The answer will be stored in the **extra case details screen**.

6. To amend click on the extra case details shortcut 

available on the case diary navigation panel. The following screen will appear.



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

Generating an Email without an Attachment using the Email Template

1. Double click on the **action** to generate it.

2. This will take you to **Outlook**. The email can then be edited and sent in the normal way.

3. Return to Keyhouse and **complete** the action in the normal way. See **Marking a Task as Complete** (p. 80) for further information.

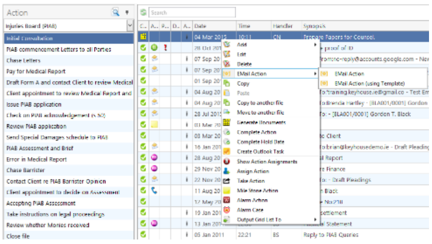
Generating an Email with an Attachment using the Email Template

1. Double click on the **action** to generate it.

2. **Process** the document in the normal way.

3. Once the document has been generated and edited, close it and return to Keyhouse.

4. Right click on the action in the **Case Diary** and select **Email Action**. Then select **Email Action (using Template)**.

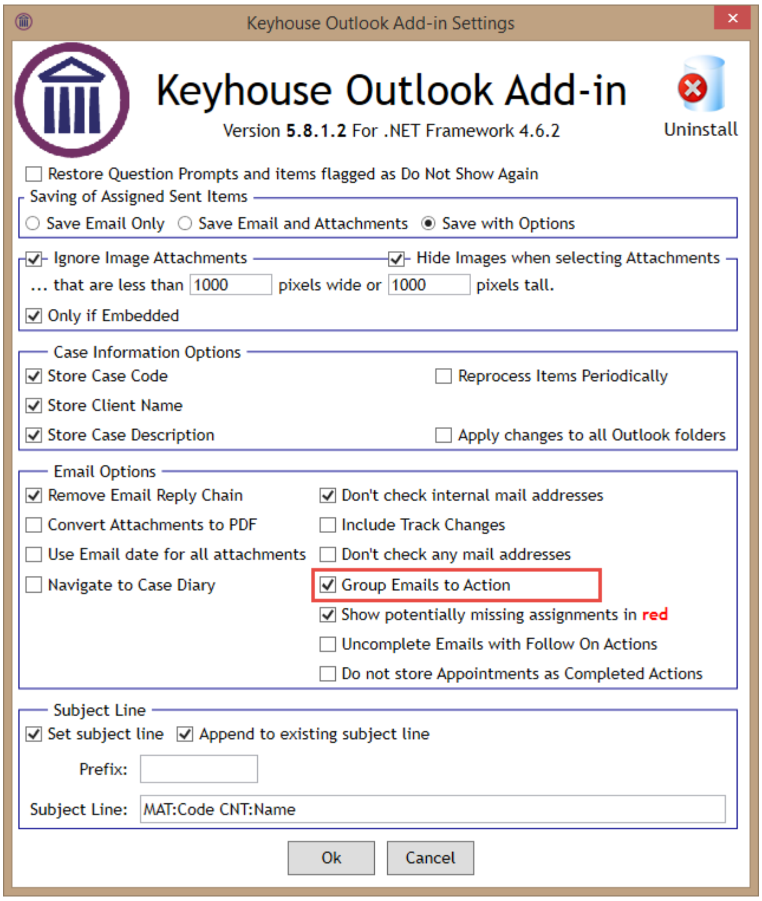


5. The email will generate in **Outlook** with the Attachment. The email can then be edited and send as normal.

6. Return to Keyhouse and complete the action. See **Marking a Task as Complete** (p. 80) for further information.

7. The email and the attachment will appear as individual actions in the case diary.

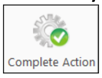
8. If you want them to appear as a single item in the Case Diary go to the About Button in Outlook and tick the Group Emails to Action.



Working with Documents already processed

Marking a Task as Complete

Tasks having been 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.

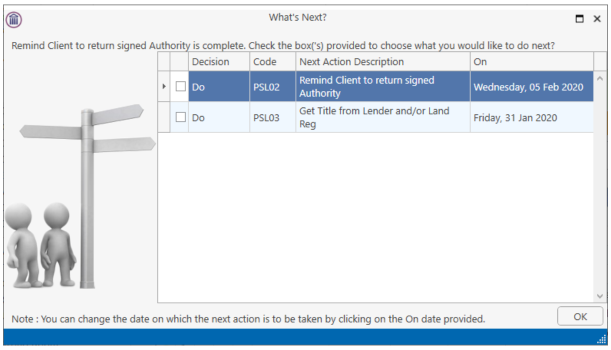
1. **Click** on the Task in the Case Diary.
2. Click on **Complete Action** 

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.

> **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.

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

Or

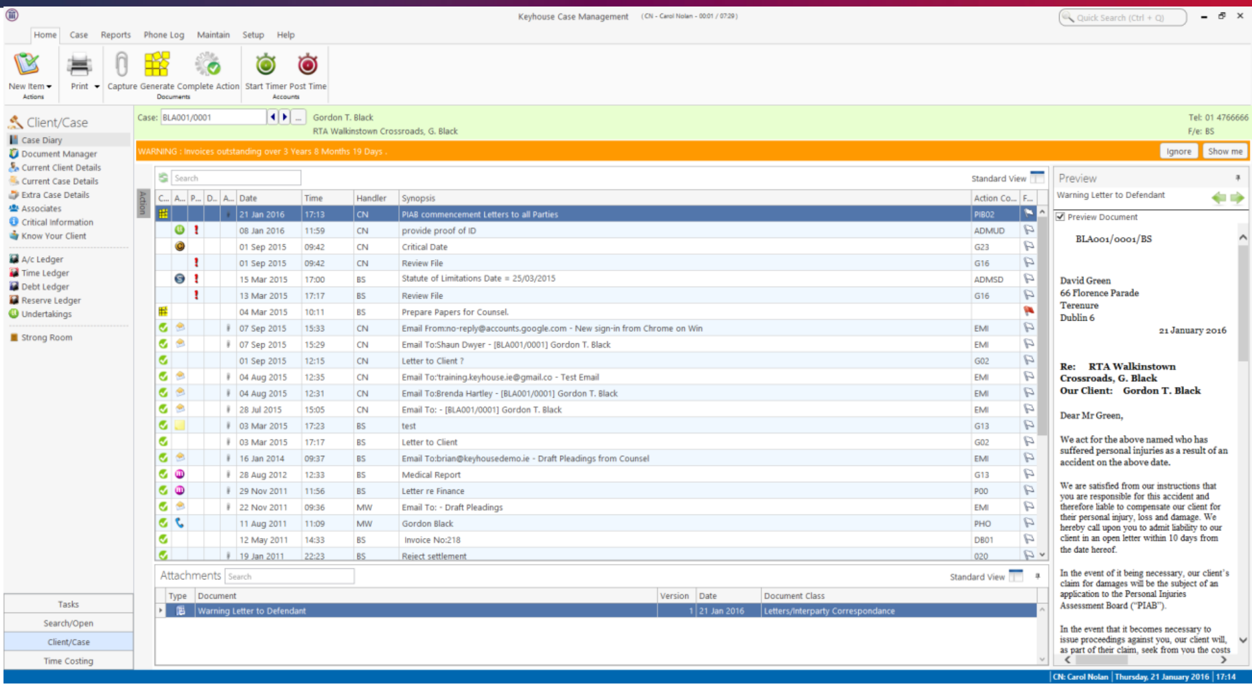


If the follow-up action has been setup to **"ask the user which action to process"** the user will be given a choice to insert in the case diary. The following dialog box appears **tick the next task** and click **OK**. The task/s will appear in the case diary.

> **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

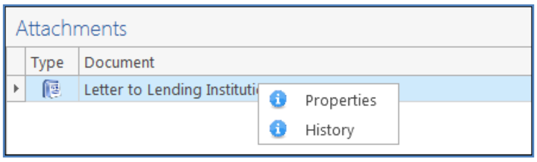


2. **Double Click** on the document in the attachment window. Word will launch and open the document.

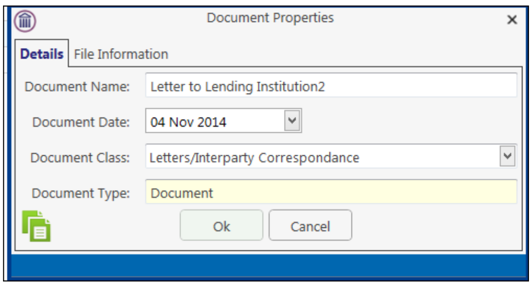
- To open multiple documents attached to the same action, select the documents then right click and select Open Attachment.
- Tip to preview a precedent document: Click on **search/open** on the navigation bar. Then click on **template library** then search for the precedent required. See the chapter 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 dialog box will appear.

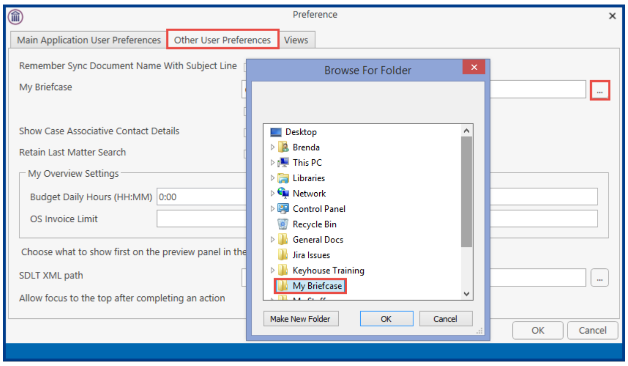


3. **Amend** the document name and class as required.
4. Click **OK** when complete.
5. A **message** will appear asking you to confirm the update, click **Yes** to confirm.

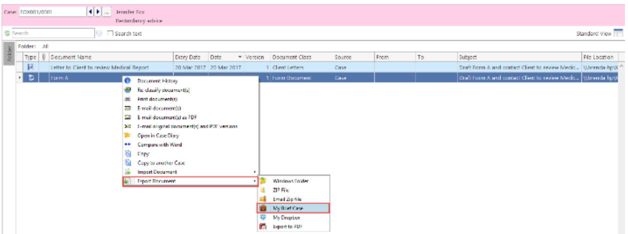
Exporting and Importing Documents

When document must be edited where access to Keyhouse will not be available, documents can be exported from the system. Once access to Keyhouse is available again, the documents can be imported back into the system.

1. Create a folder on your computer to hold the files
2. Go to Keyhouse and click on the Setup Tab
3. Click Personal Settings and select Preferences
4. Go to the other User Preferences Tab

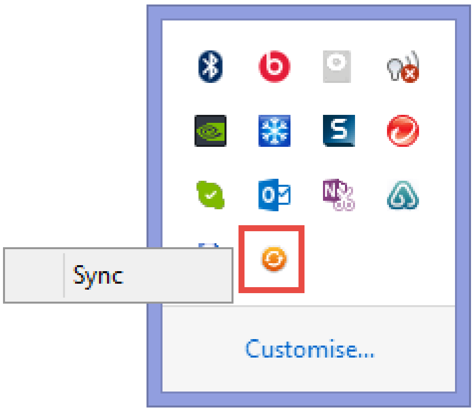


5. Click on the Browse Button to the right of My Briefcase.
6. Locate the folder you created to hold the exported files, click OK and click OK again
7. Open to the required matter and then open the Document Manager
8. Select the documents to be exported. Use the <Ctrl> button if you need to select multiple documents.
9. Right click and select Export Document.
10. Then select My Briefcase.



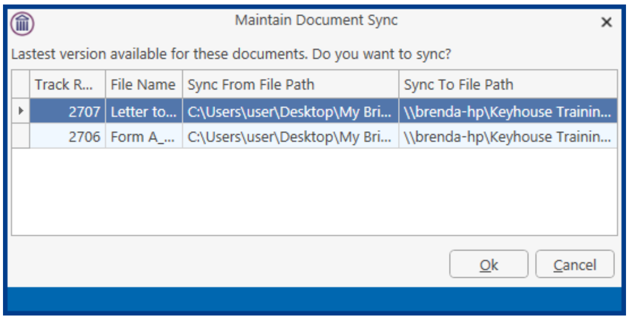
11. Go to the Document Folder on your computer to view the documents.
12. Make any changes needed.
13. To update the documents in Keyhouse, open the matter and go to the Document Manager.
14. If the Keyhouse Framework Sync Button is not visible, click on the up arrow in the bottom right of the screen.

15. Right click on the Keyhouse Framework Sync Button and click Sync

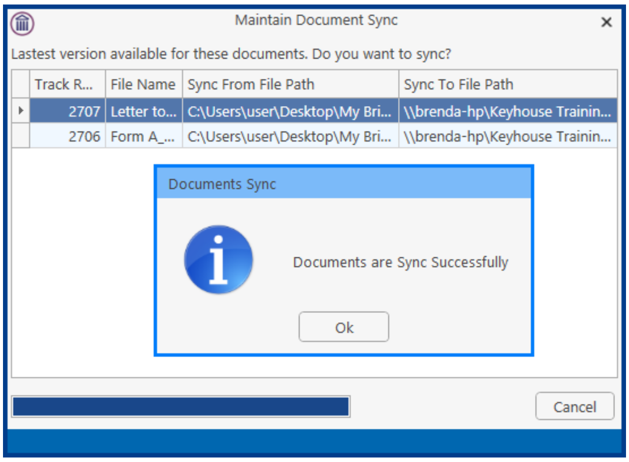


NOTE: This icon can be added to the Task Bar by clicking on Customise and setting the Icon to Show Icon and Notifications

16. The following Dialog Box will appear.

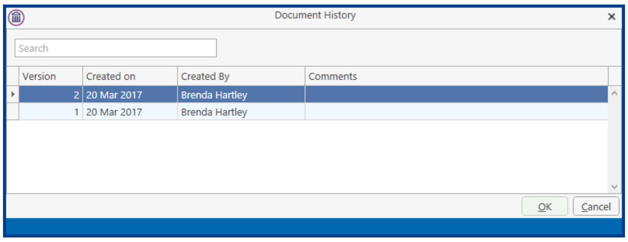


17. Click OK. Only documents that have been changed will be updated by creating a new version of the document. (For information on Version Control see the Word and Outlook Add In Manual)



18. The most recent version of the document is now available on the system.

19. To see the original version, right click on the document and select Document History



20. Double click on the original version to open it. Right click to email or revert to this version.

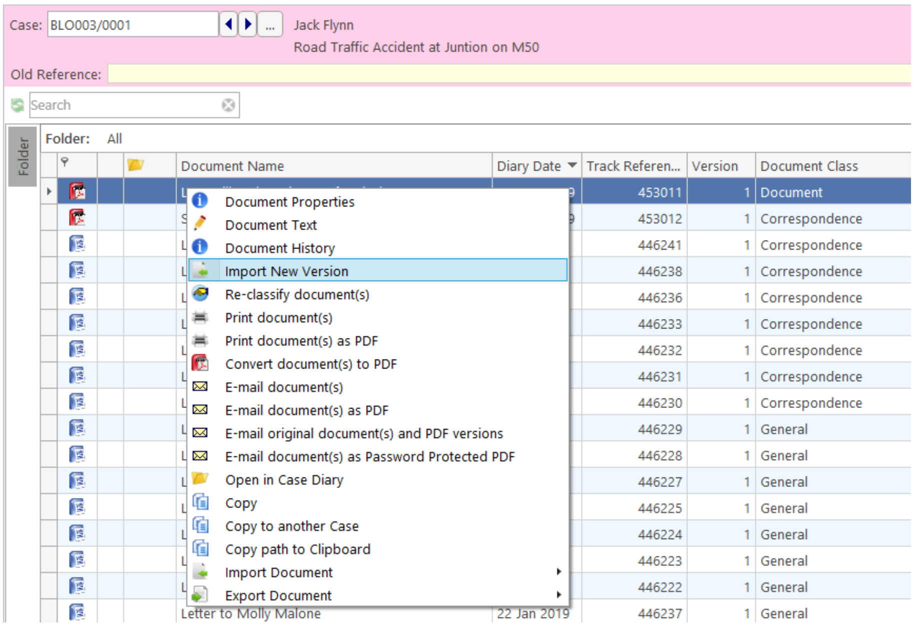
NOTE: All future versions of the document should be saved as new versions. See the Outlook and Word Add-In Manual for further information.

Creating Versions of PDF Documents

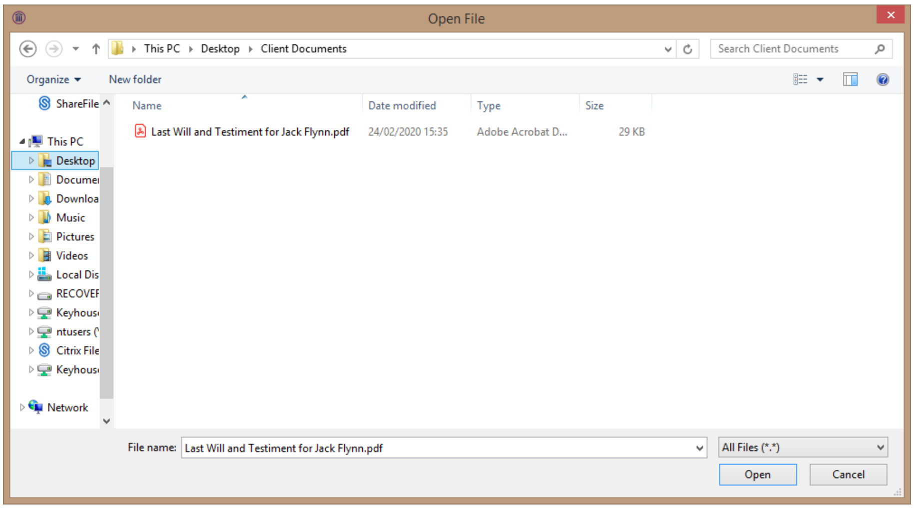
It is possible to import a new version of a PDF document to an existing PDF document. This can be done from the Case Diary, Document Manager, Strong Room and Undertakings.

1. Locate the document on Keyhouse in any of the above locations.

2. Right click and select Import new Document.

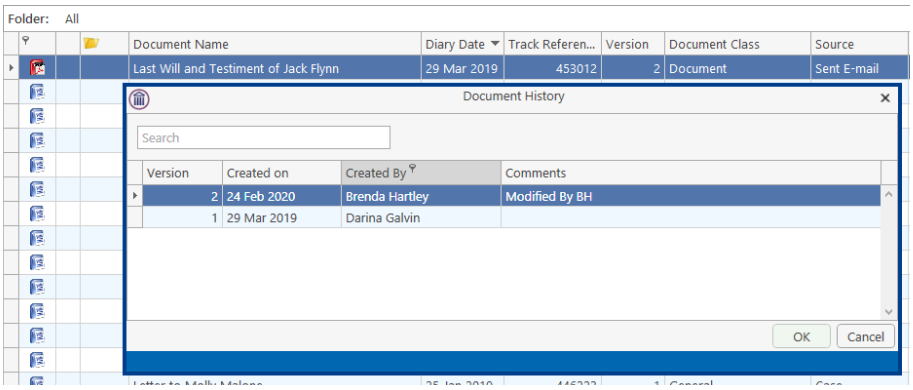


3. Locate the document, select and click Open.



4. A new version of the document has been created.

5. To see older versions of the document, right click on the document and select Document History.

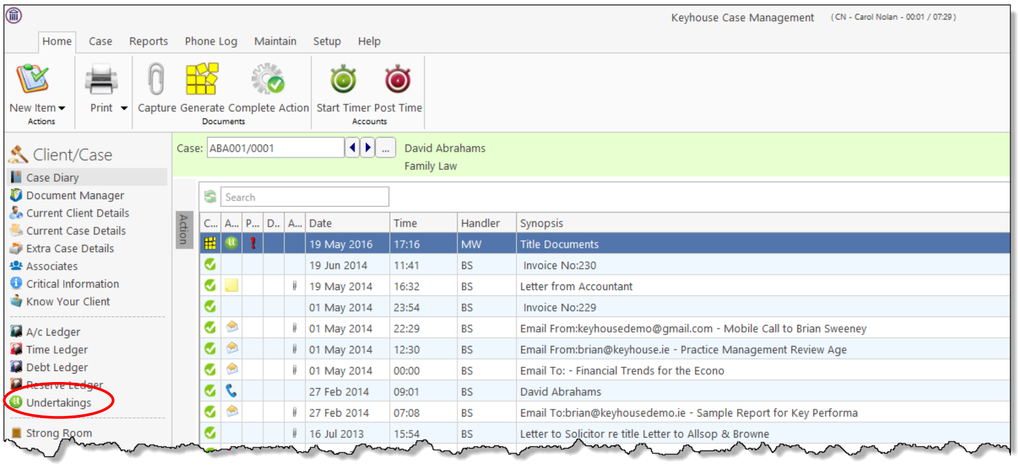


Undertakings

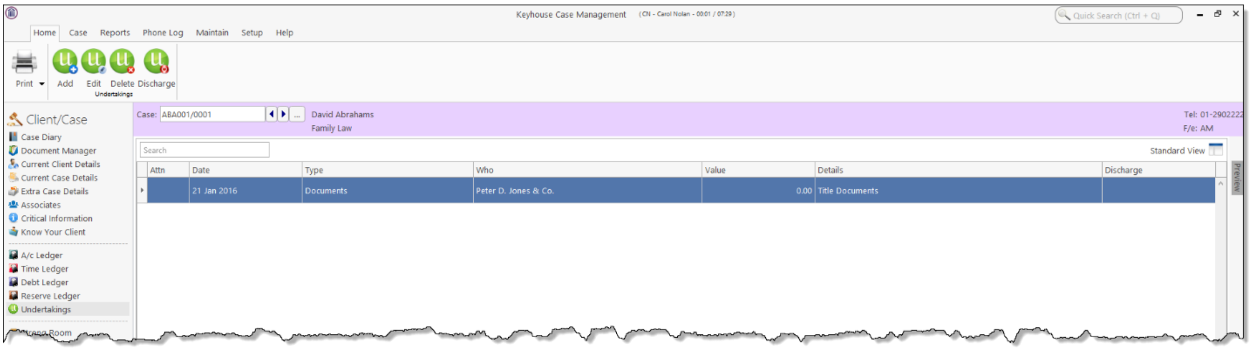
Viewing Undertakings

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

2. aClick on **Undertakings** (circled in red below) to see all undertakings on this case.



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



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

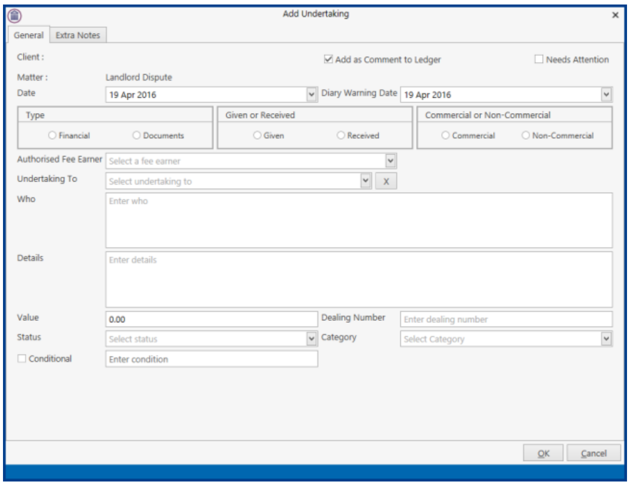
Adding and Viewing an Undertaking

1. Go to the **Undertaking** screen.

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

3. **Input** the following Information

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



Needs Attention: Tick if it needs to be action.

Date: This is the 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.

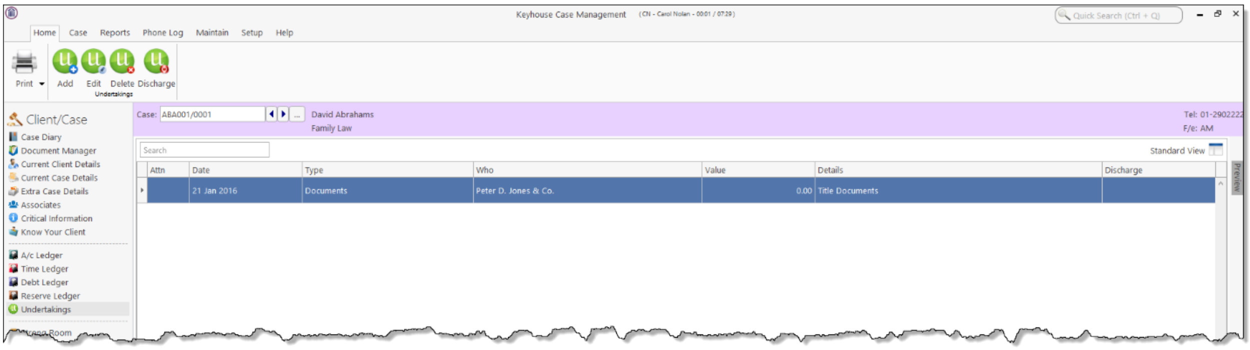
Details: **Input** a description of this undertaking.

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

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

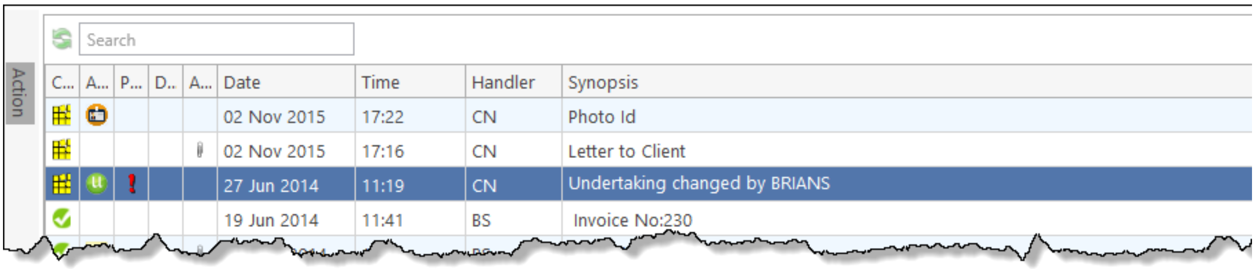
Dealing Number: **Input** the dealing number

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



It will also be 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 



5. To view the Undertaking details, **double click** the task. It is not possible to modify the undertaking from this screen.

6. Click **OK** to close.

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

How to Edit an Undertaking

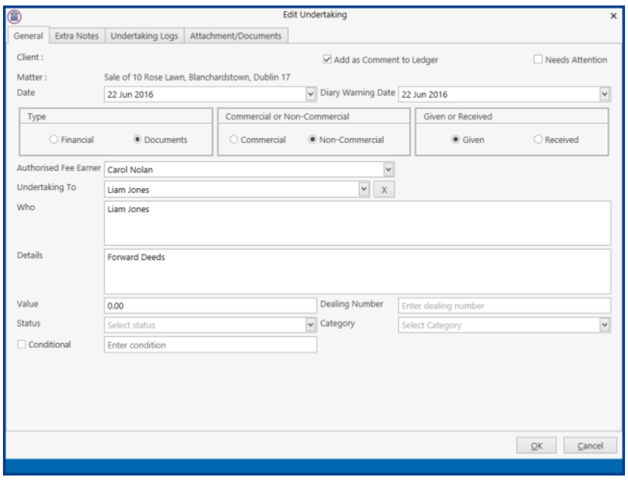
1. Go to the **Undertaking** screen.

2. **Double Click** on the undertaking to be amended. The following dialog 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 Add a Document to an Undertaking

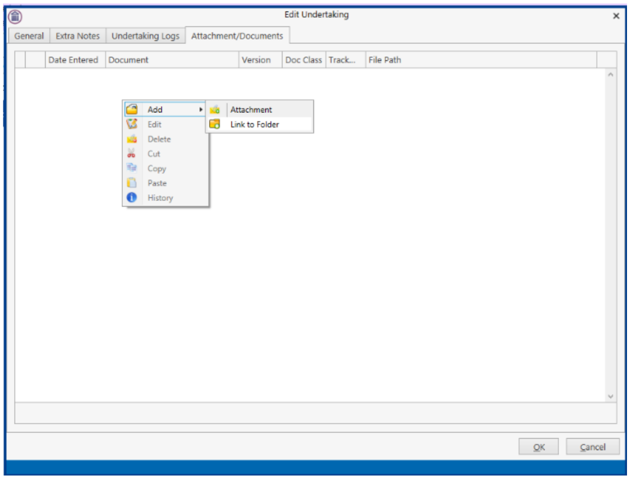
1. Go to the Undertakings screen.

2. **Double Click** on the undertaking to be amended. Click on **Attachment/Document.**

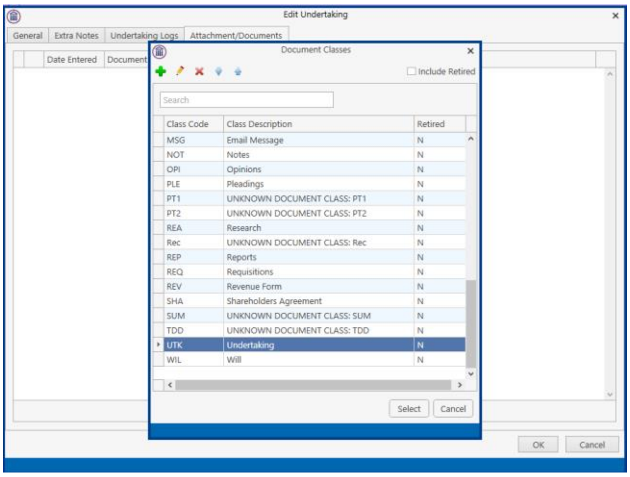
3. **Right Click** in the White Area and click Add

4. Click on Attachment to add the document or Link to Folder to create a link to the location of the document.

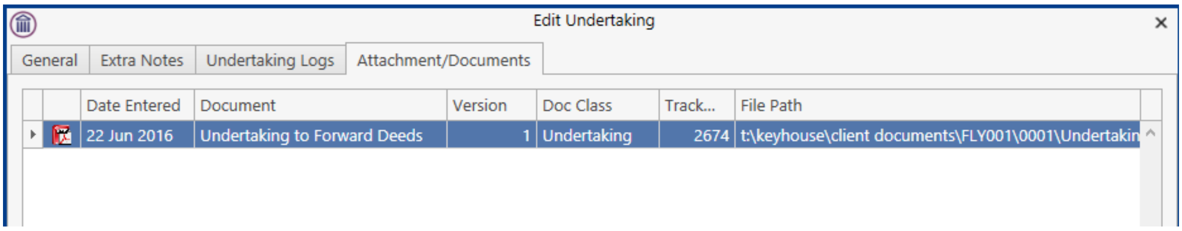
5. **Navigate** to the location of the document e.g. Scan Capture folder and select the document.



6. Choose the correct Classification for the document and click Select and click OK



7. The document is now visible on the Undertaking Screen and in the attachment section of the case diary.

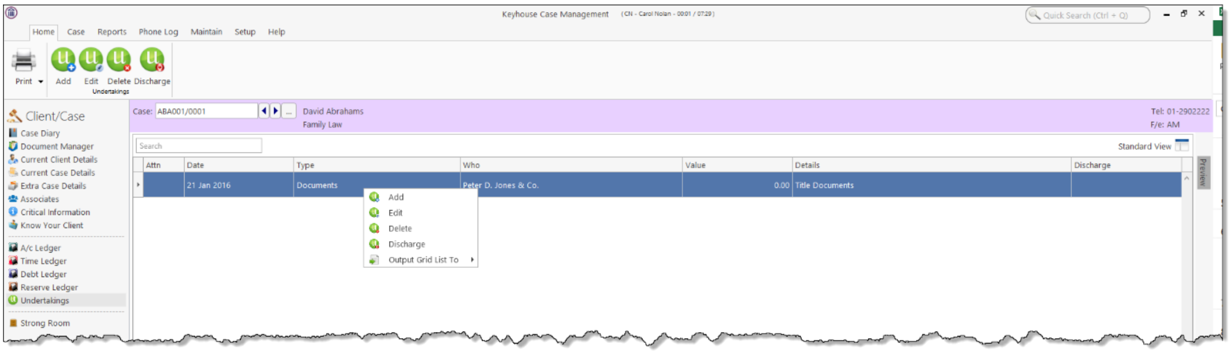


NOTE: It is possible to added documents to an Undertaking from the Search/Open Screen.

How to Discharge an Undertaking

1. Go to the **Undertaking** screen.

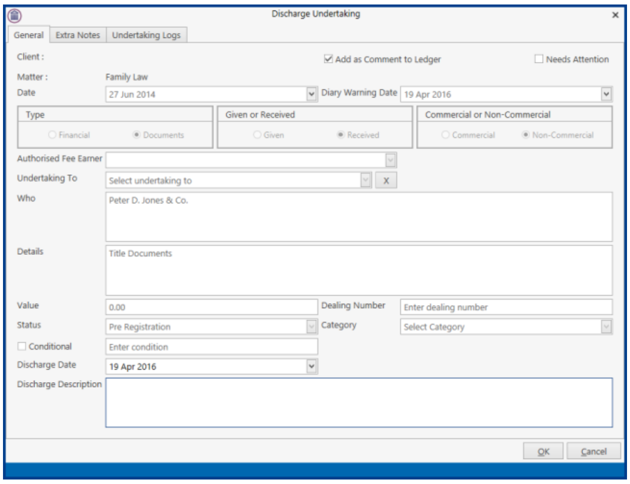
2. **Right Click** on the undertaking to be discharged; a menu will appear as seen below



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

4. **Set** the Discharge Date. Note you cannot set a date into the future.

5. Input a **description** in the discharge description box.



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

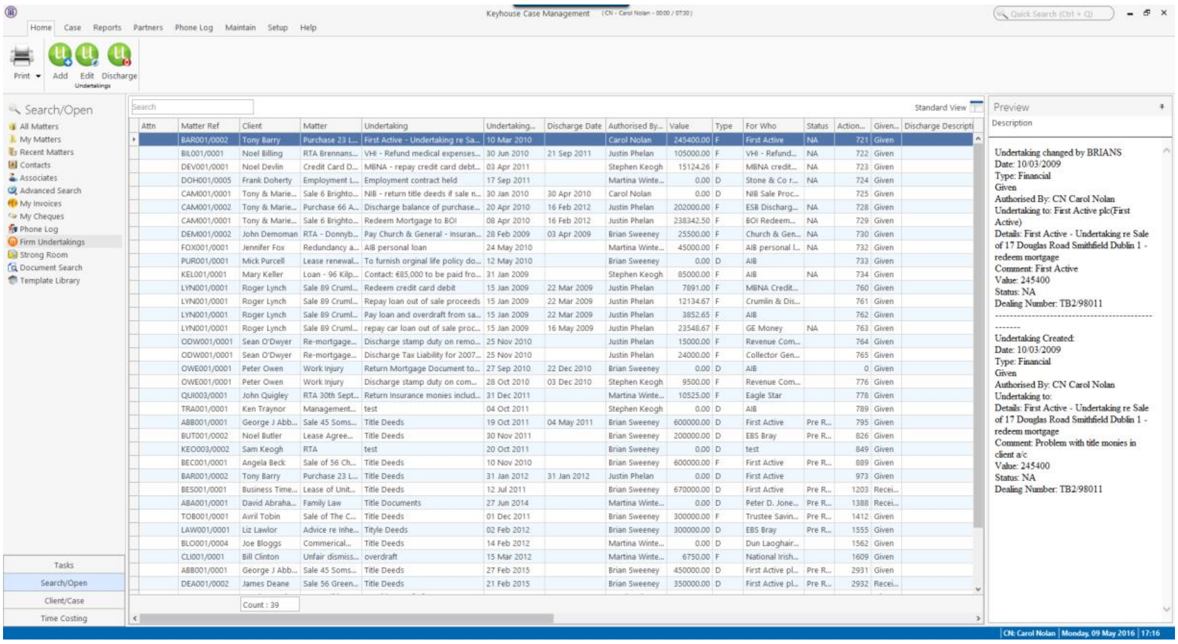
NOTE: It cannot be edited beyond this point.

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

Undertakings Register

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

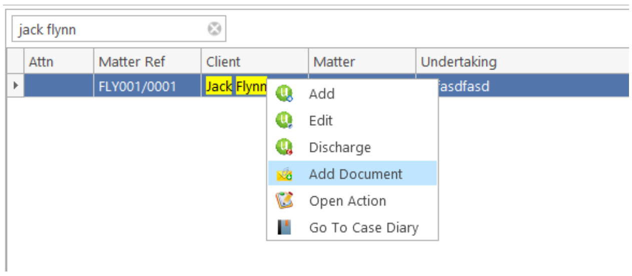
This register can be used to search for and preview undertakings without the necessity of opening them.



Attaching Undertaking Documents using the Undertakings Register

1. Go to **Search Open** and select **Firm Undertakings**.

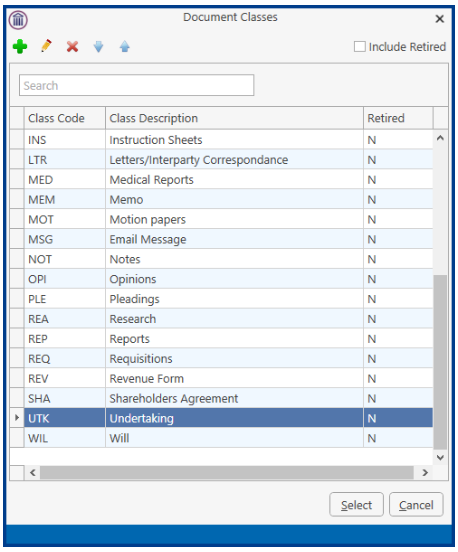
2. Search for the required **Undertaking** and right click.



3. Select **Add Document**.

4. **Navigate** to the location of the document e.g. Scan Capture folder and select the document.

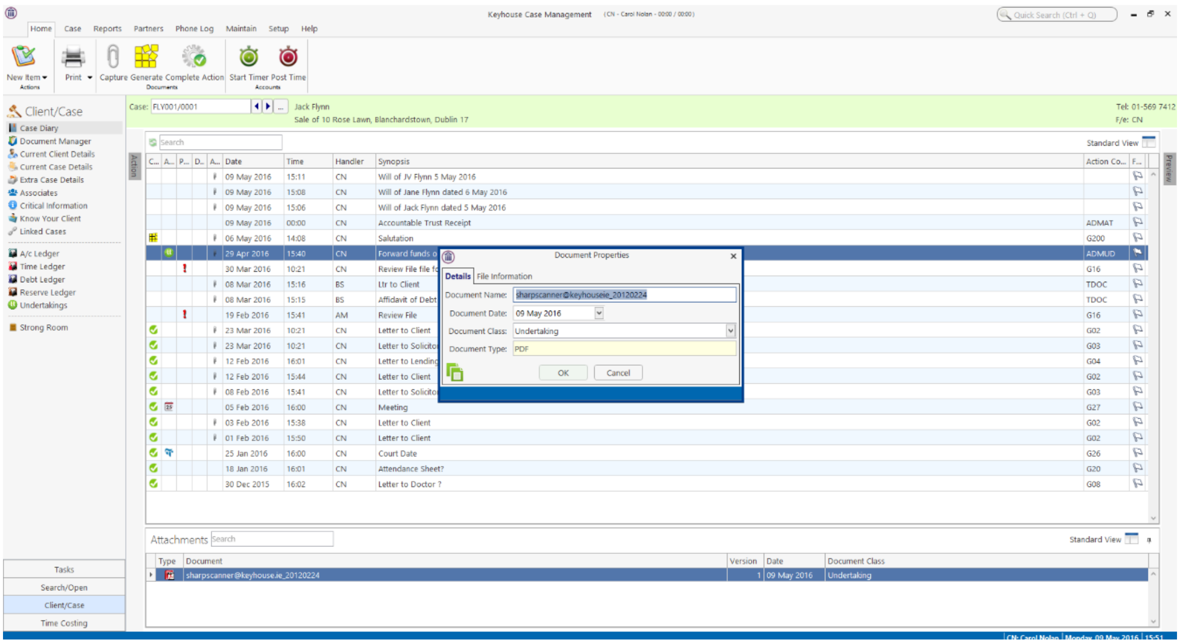
5. Highlight the **Document Class** and click **Select.**



6. The document is now visible in the **Case Diary**. Go to the **Case Diary** and locate the **Undertaking**.

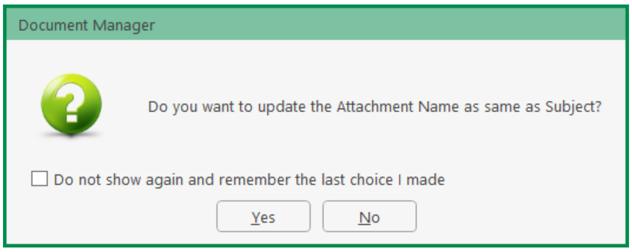
7. If the document needs to be renamed go to the **Attachment** Section, select the document and right click.

8. Select **Properties.**



9. **Rename** the document and click OK.

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



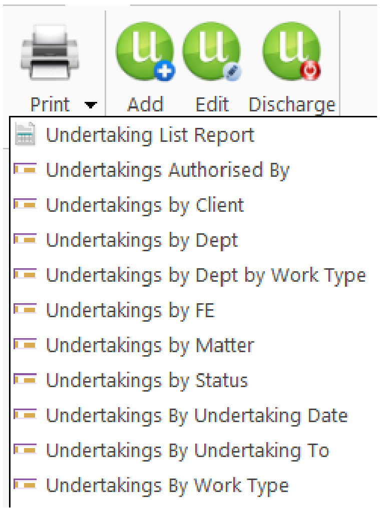
Undertaking Reports

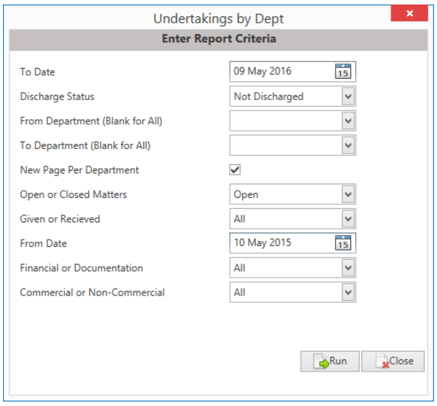
Reports on Undertakings can be created based on several criteria. The reports are available as part of the System Reports but they can also be found in the Firm Undertakings on the Search/Open Screen. There are also two reports available in Undertakings on the Case Diary.

Create an Undertaking Report

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

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

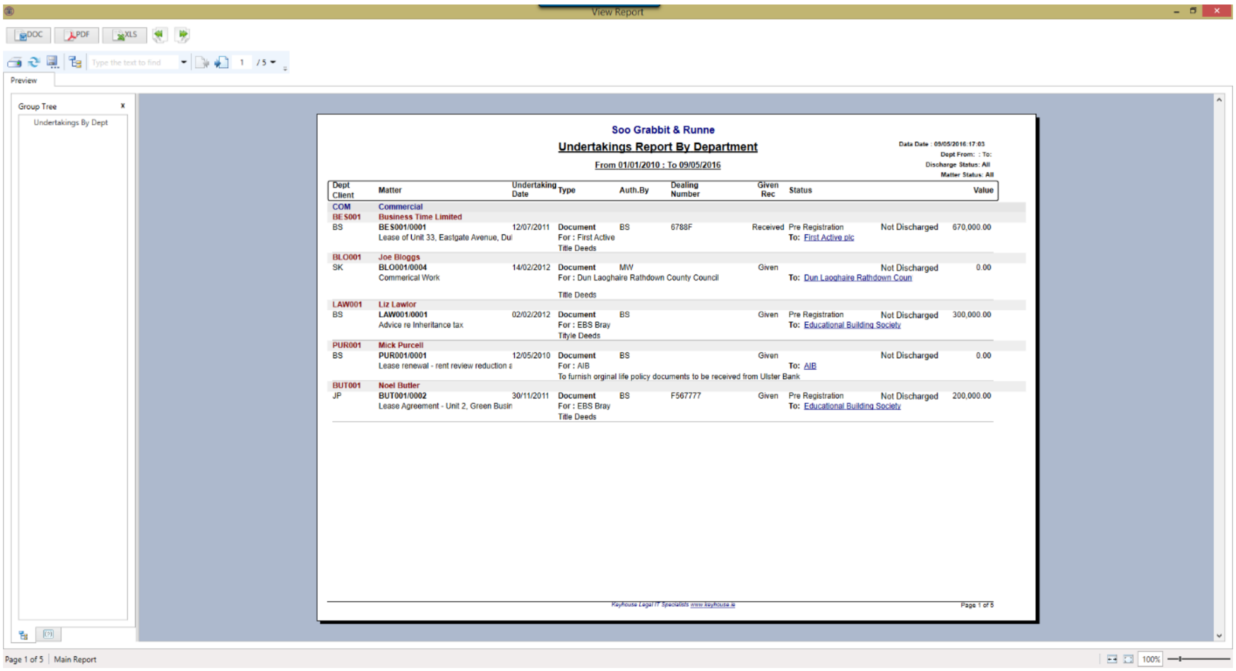




3. Click on the required report e.g. Undertakings by Dept. and the following report dialog box will appear.

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

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



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

- Click on Doc 

 to open a copy to Word
- Click on PDF 

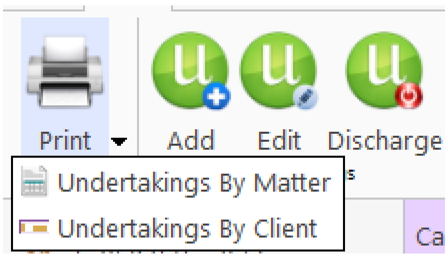
 to open in Adobe.
- Click on XLS 

 to open a copy in Excel.

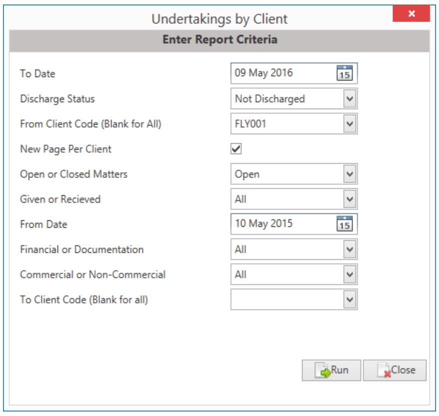
Printing from Case Undertakings

1. Click to **Case Diary** and select **Undertakings** from the Column on the left.

2. Click on the **Print** option on the Ribbon.



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



7. Set the required **parameters** and run the report.

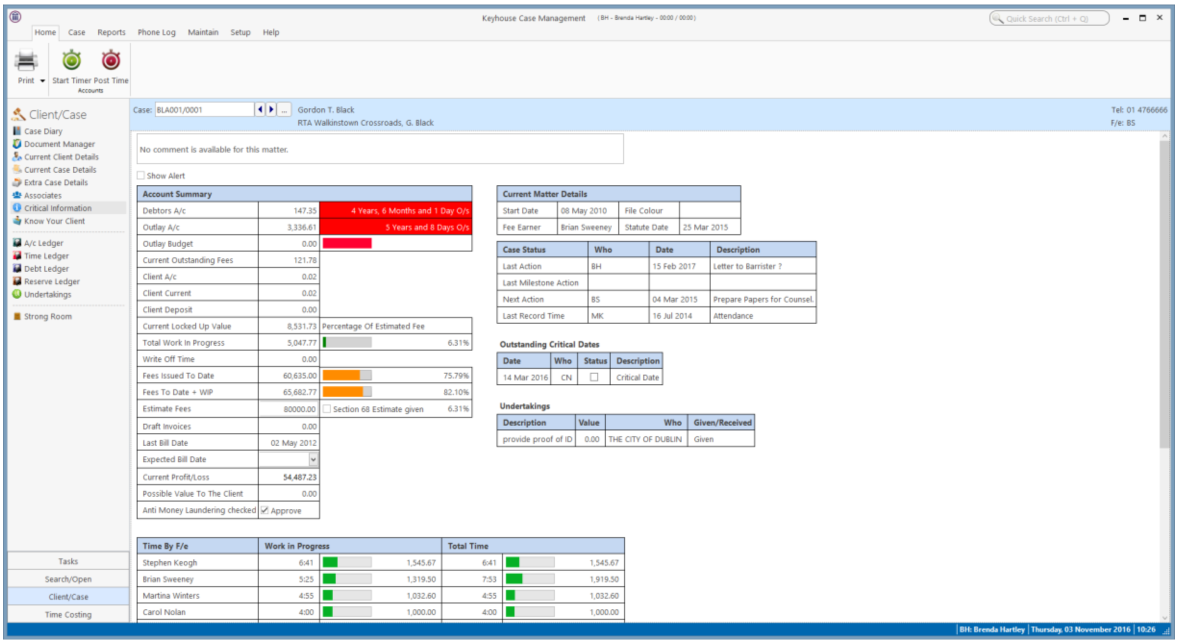
8. Click on **print** or click on one of the following options available on the report toolbar:

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

How to view Critical Information and Print Reports

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

2. Click on **Critical Information** on the **Navigation** panel. The following screen will appear displaying critical Information.



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:

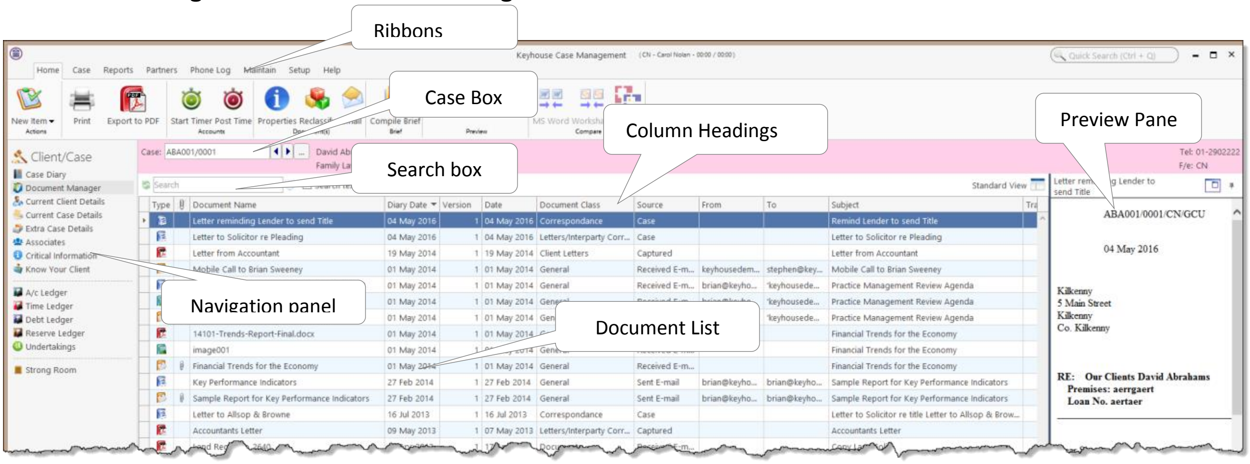
- Chapter 6 for the Task Manager
- Chapter 7 for Know Your Client
- Chapter 8 for the Keyhouse Capture
- Chapter 10 for the Conflict Search
- Chapter 11 for the Strong Room
- Chapter 12 for Time Recording
- Chapter 13 for the Accounts
- Chapter 14 for the Debt Ledger
- Chapter 15 for the Reserve Ledger

Chapter 5: Using the Document Manager

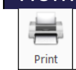
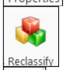
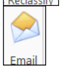
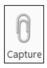
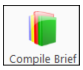
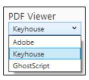
Document Manager

Getting around Document Manager

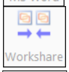
Below is an image of the Document manager window.



Window area	Description
Case Box	Input the case reference in this box or click the … browse button and search for the required case.
Column Headings	Click the column headings to sort the list of documents by name, version, diary date, document date, document class, Source, From, To, Subject.
Document List	The list of documents in this case are displayed.
Preview Pane	The selected document is previewed in this window. PDF documents can be viewed using different PDF programs.
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
	Capture documents from a scan folder
	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 the down arrow to select the PDF Viewer to be used.

Compare two documents using Word's Document Compare feature



Compare two documents using WorkShare (if installed)

Compare two documents using Libéra (if installed)

How to search the Document Manager

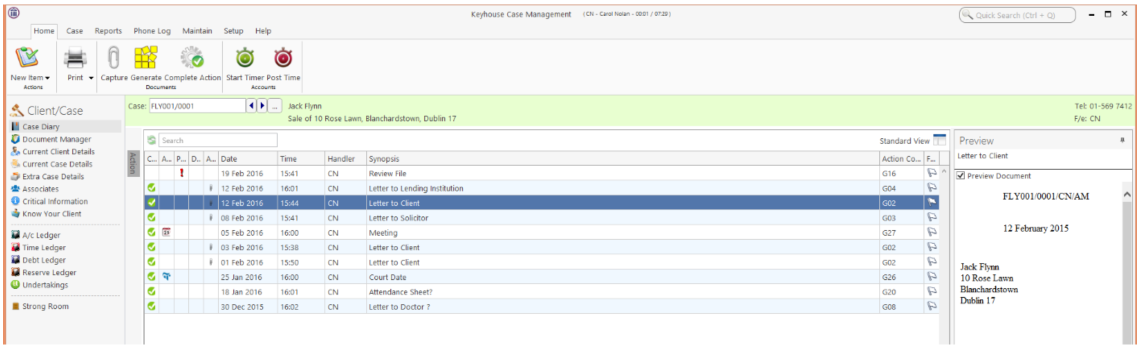
Please note that you will not be able to search text using 'Noise Words' i.e. words that appear in almost every piece of text such as 'on', 'and, 'in', 'it' etc. Add Keywords to the search box when searching for content in a document.   'AND' or 'OR' are then added to the keywords depending on the result required.

AND will return only documents that contain all the keywords.

OR will return documents that contain any of the keywords.

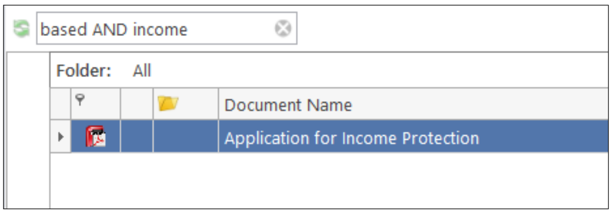
1. **Open** a case in the Case Diary.

2. Click **Document Manager** on the Navigation panel. All the attachments in the case will be listed.

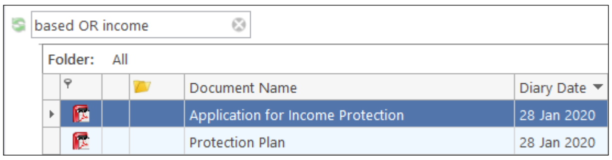


- Enter keywords in the search box separated by AND or OR.

  based AND income – will return a document that contains both these words.



  based OR income – will return any document that contains either of these words.



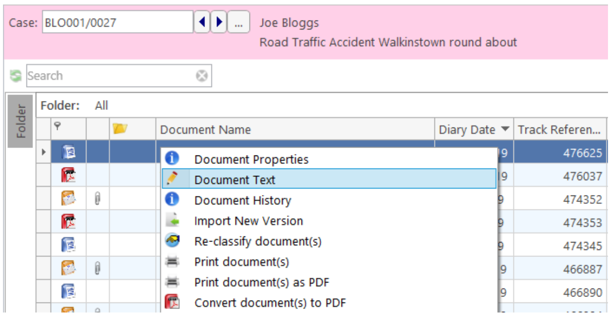
3. **Select** a document to see a preview. **Double click** to the open the document.

Improve the Document Text Search.

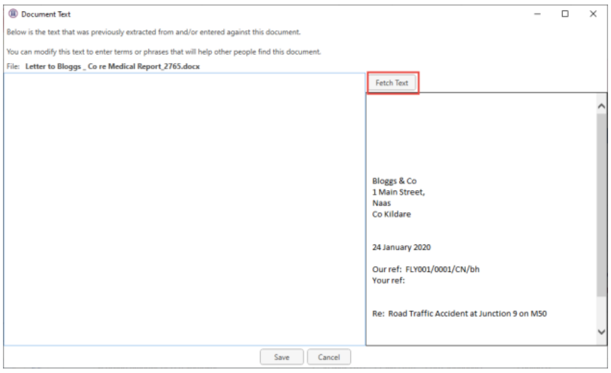
To make documents easier to find and speed up searching, keywords can be added to documents. This is particularly important when dealing with PDF documents as searches cannot read the content of documents. This can be done as the documents are scanned into Keyhouse or afterwards from either the Document Manager or Case Diary.

1. Select the document into which the text is to be added.

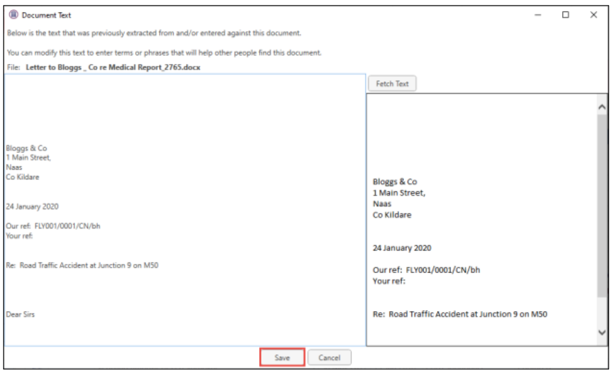
2. Right click and select Document Test.



3. A dialog box will appear

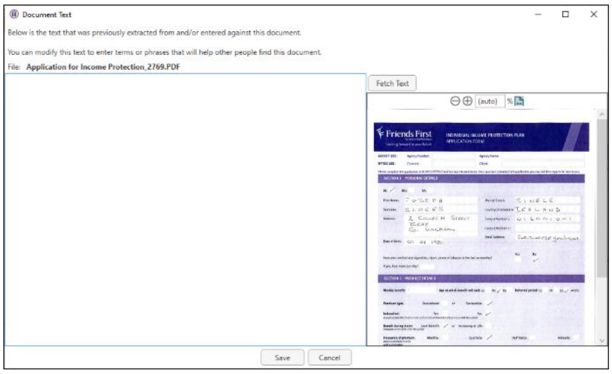


4. To add the content of the document click Fetch Text button. Alternatively, enter key words into the white area.

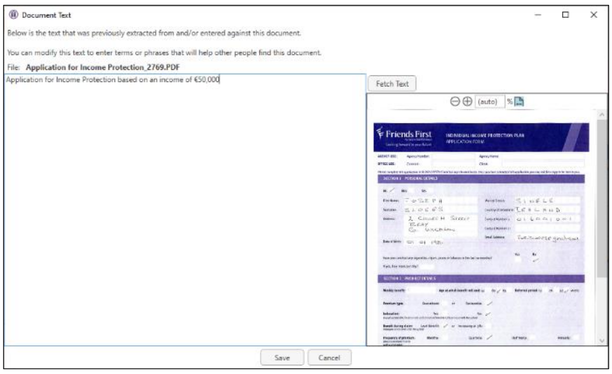


5. Click Save.

6. If the document is a scanned PDF document, the system may not be able to read the text when you click Fetch Text.



7. Click in the white area and add text that will enable the document to be found easily.



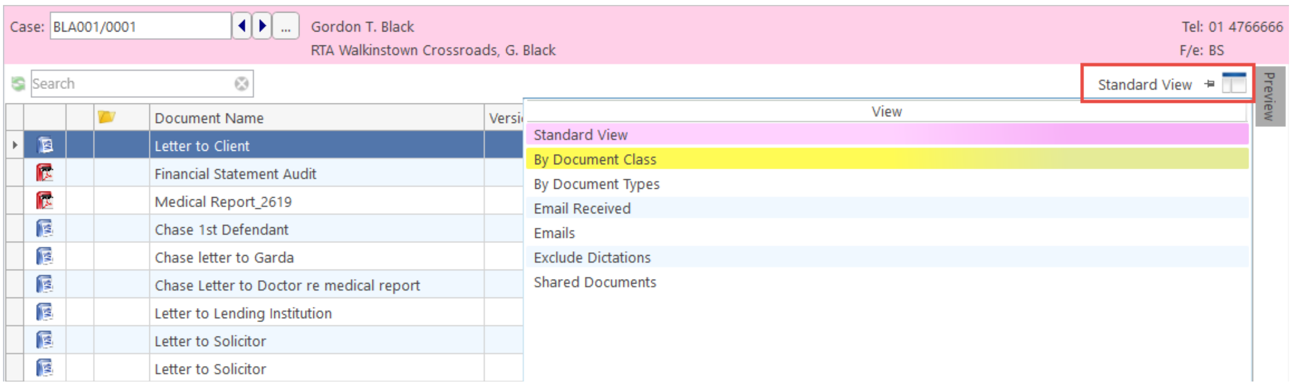
8. Click Save.

How to Sort by Column Heading

Data can be sorted using one of two ways. The first is by changing the view and the other is by clicking on the Column Heading.

Sort using the View Button.

1. Click on the View Button.

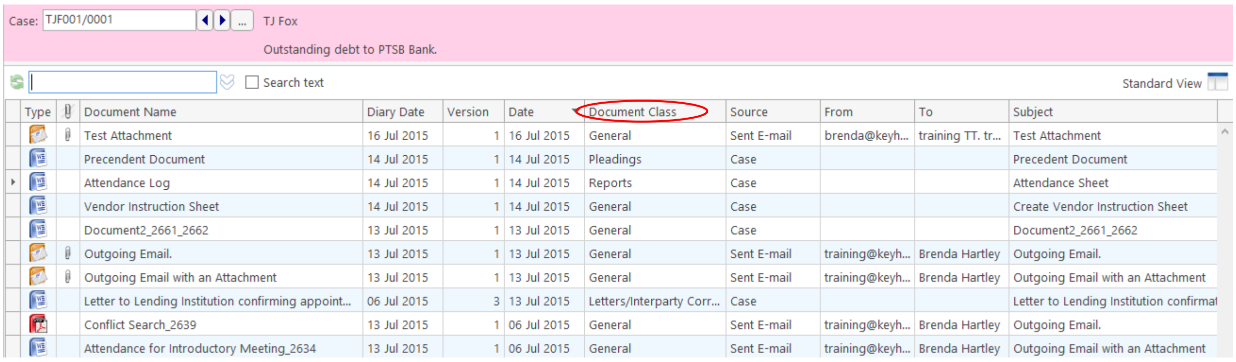


2. Select the view required.

3. To keep this selected view, click on the pin.

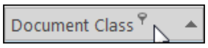
Sort using the Column Heading

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

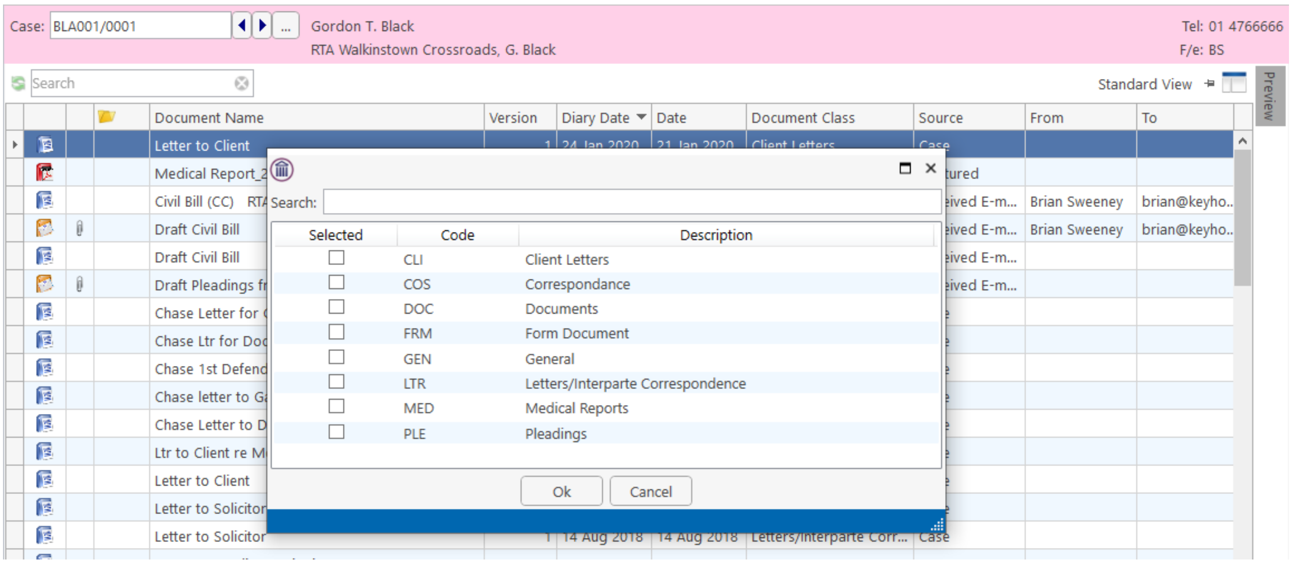


How to Filter Columns

1. Move your cursor to the column heading required, so that the ***filter pin*** appears.

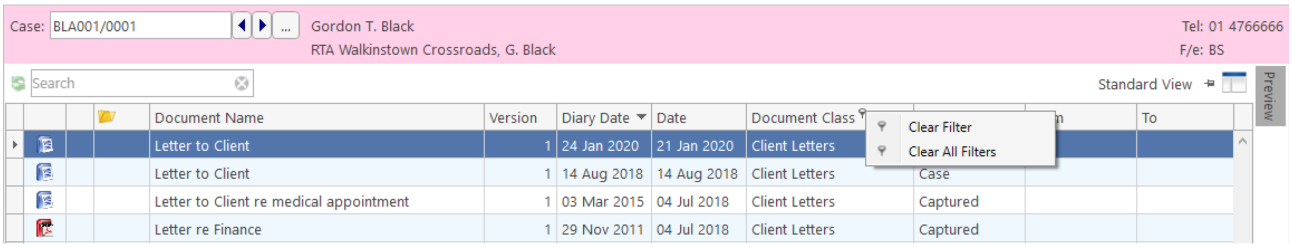


2. Click the filter pin and the following dialog box appears.



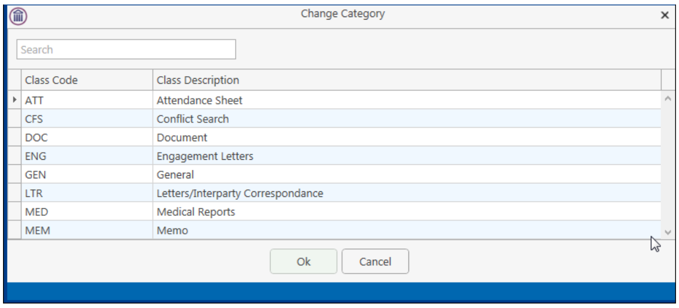
3. Tick the box for the filters required and click OK.

4. To remove the filter, right click on the pin and select clear filter or clear all filters.



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.

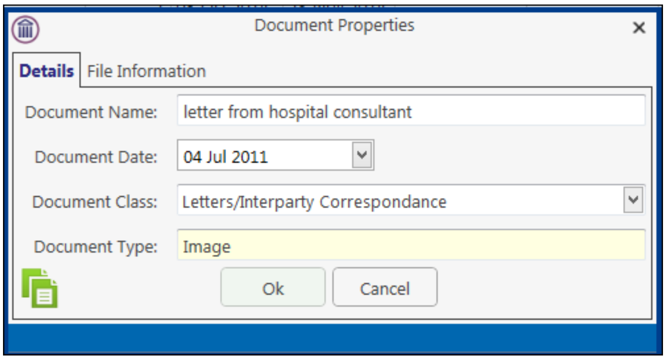
2. **Search** for the required category, if necessary, and select it.

3. Click **OK**.

How to change the Document Properties

1. Select the document whose properties you want to amend.

2. Click **Properties** on the Home tab, to show the Document Properties dialog 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)

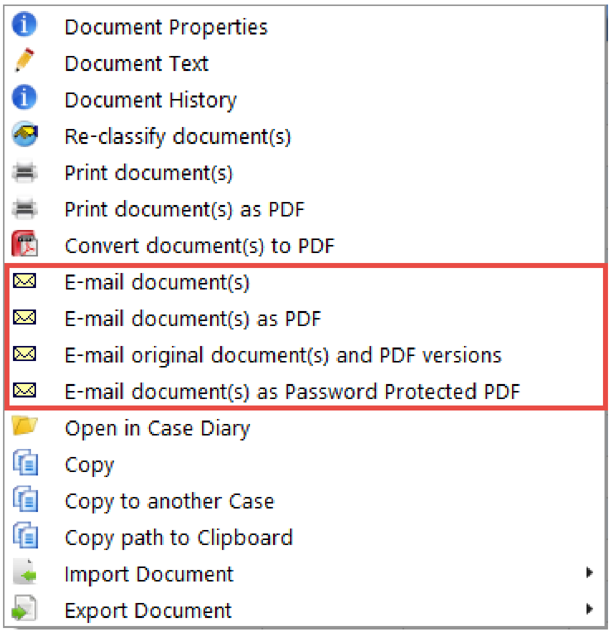
1. Select the document or documents you want to email then click **Email** on the Home tab.

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.

Alternatively

3. Right click on the document or documents to be emailed and select the format the documents should be sent in.



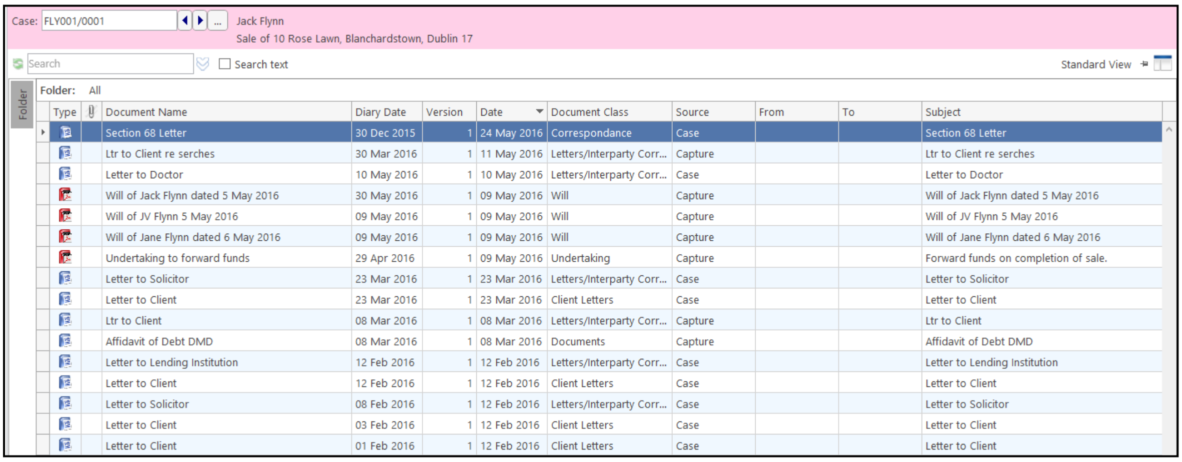
4. Outlook will create a new email with the document(s) attached; complete the email as normal and send.

NOTE: Emails can also be sent from the Case Diary. See the Outlook and Word Integration Manual for further details.

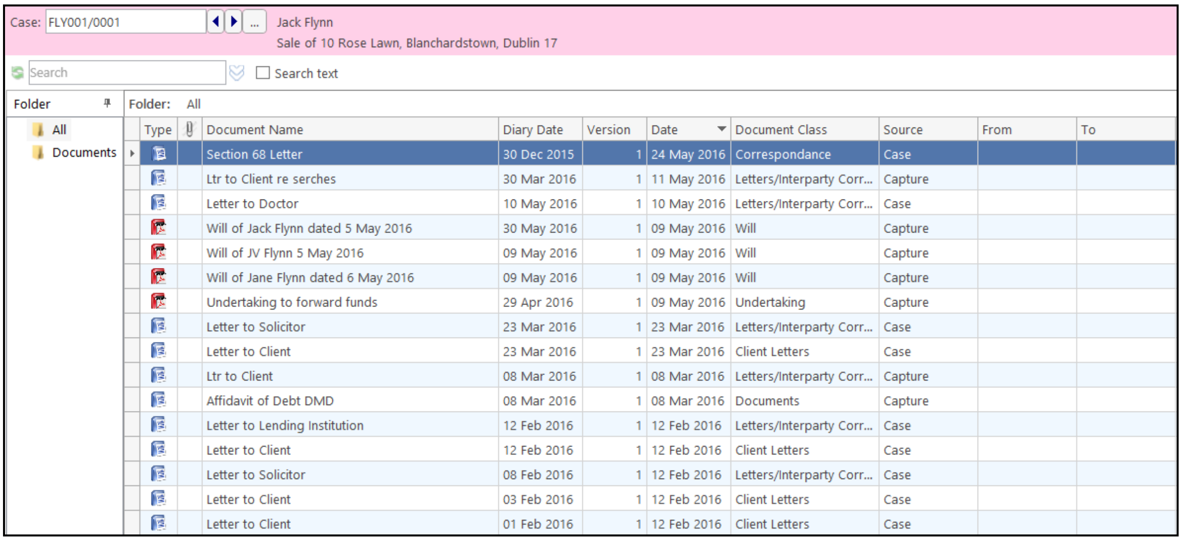
Document Folders

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

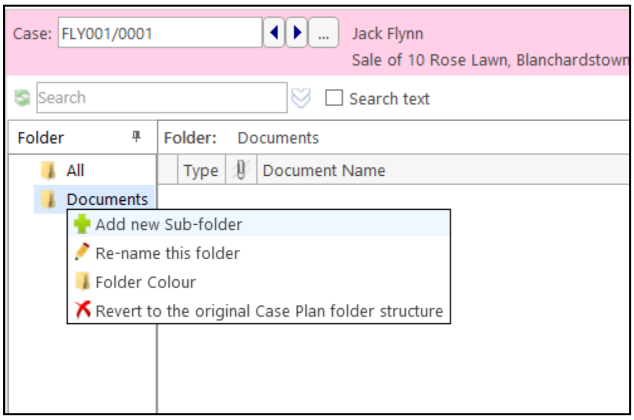
1. Go to the **Document Manager**.



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

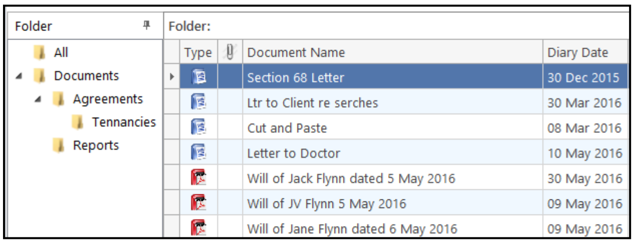


3. Right click on **Documents** and select Add new Sub-Folder



4. Enter the name of the folder and click OK

5. Continue to create the required folder structure. Sub-Folders can be added to Sub-Folders.

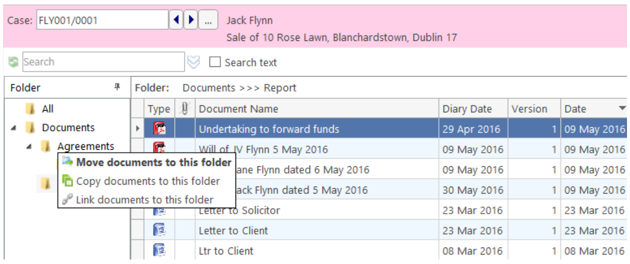


Moving, Linking & Copying Documents in the Folder Structure

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

   Alternatively

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



2. To **copy** or **link** a document into more than one folder, move it to the first folder as per Point 1.

3. Click on the **Folder** and Right Click the document to be copied.

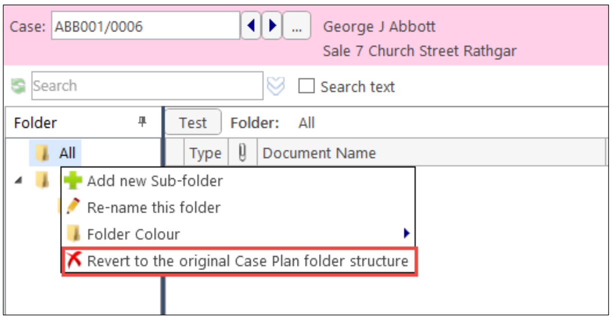
4. **Drag** to the second folder.

5. Select **Copy documents to this folder** or **Link documents to this folder**.

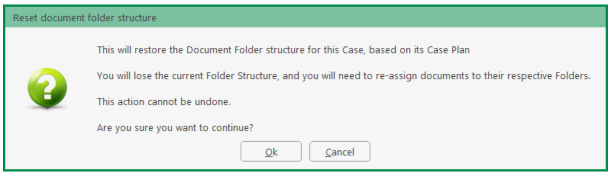
Change the Folder Structure

The user may want to revert to the original folder structure as set up in the Case Plan/Workflow or import the Folder Structure that had subsequently been added to the Case Plan/Workflow after the case was set up.

1. Right click on Document in the Folder List
2. Select Revert to the Original Case Plan Folder



3. The following warning will appear



4. Click OK to continue

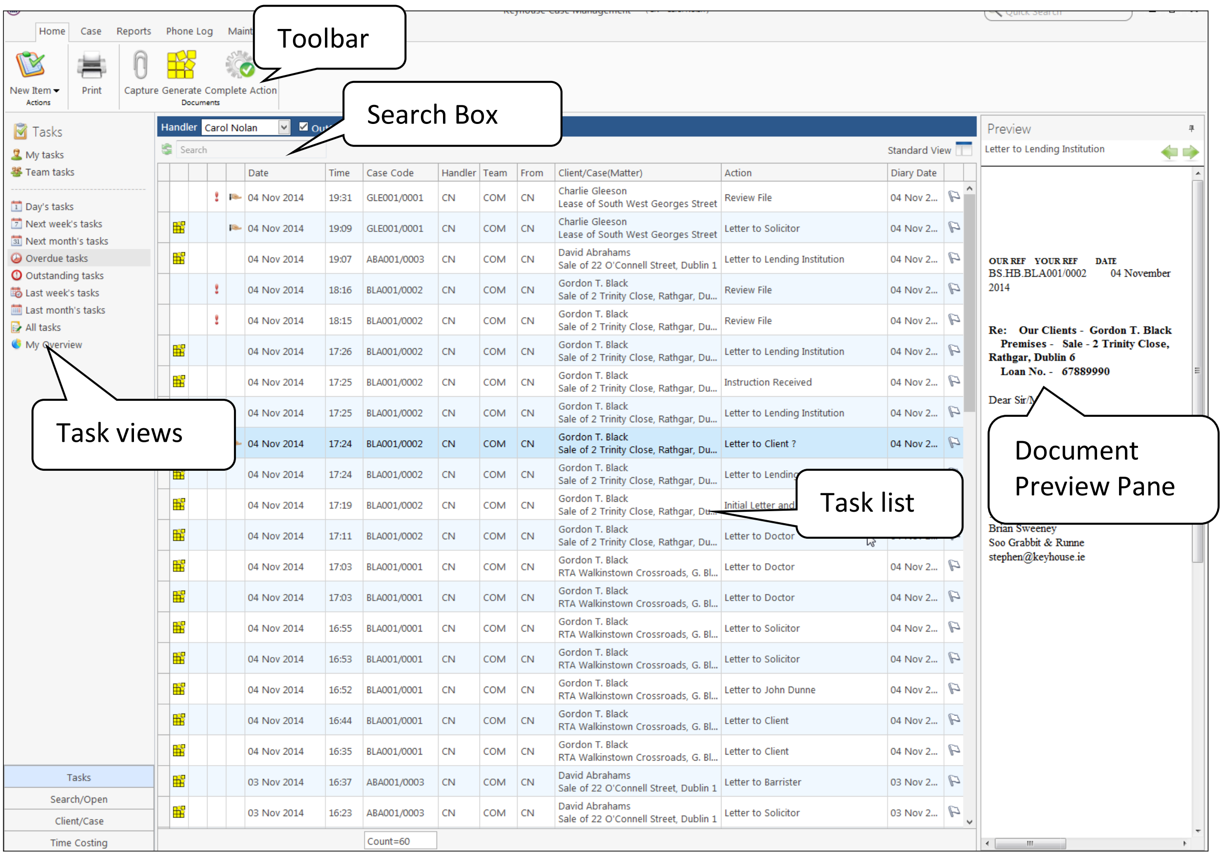
NOTE: The Document Folder Structure can also be accessed in Scan Capture, MS Word and MS Outlook.

Chapter 6: The Task Manager

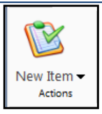
When you log in to Keyhouse you can choose to login directly to the Task Manager (see the Chapter 1 for further information). The primary function of the Task Manager is to act as a To-Do list displaying all tasks outstanding. It defaults to overdue tasks but you can navigate to specific dates. Each 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

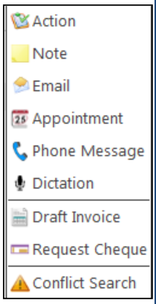


The Home Tab in Task Manager



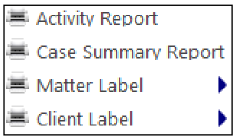
New

Click on New Item to add any of these tasks.



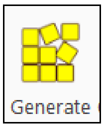
Printer

Click to print any of the following reports:



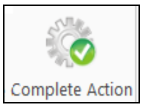
Capture

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.

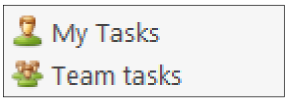


Complete Action

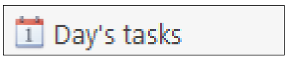
Click to mark a task as complete.

Task Views

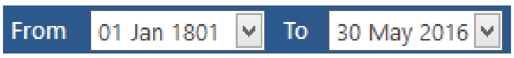
Keyhouse will automatically open on Overdue Tasks. The user may choose to navigate to any of the following lists displayed on the shortcut bar on the left.



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



Click on this to view today's tasks.



Select a range of dates.

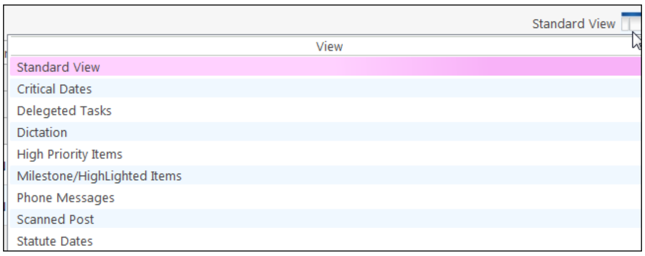
Click to view next week's tasks.

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 week'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

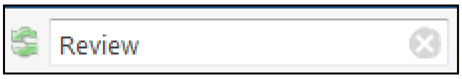
1. Move your mouse over **Preview** located to the right of the Task Manager Screen, the document preview pane will appear

2. Click on the Pin to make it permanently visible or click on the Pin again to return it to floating.

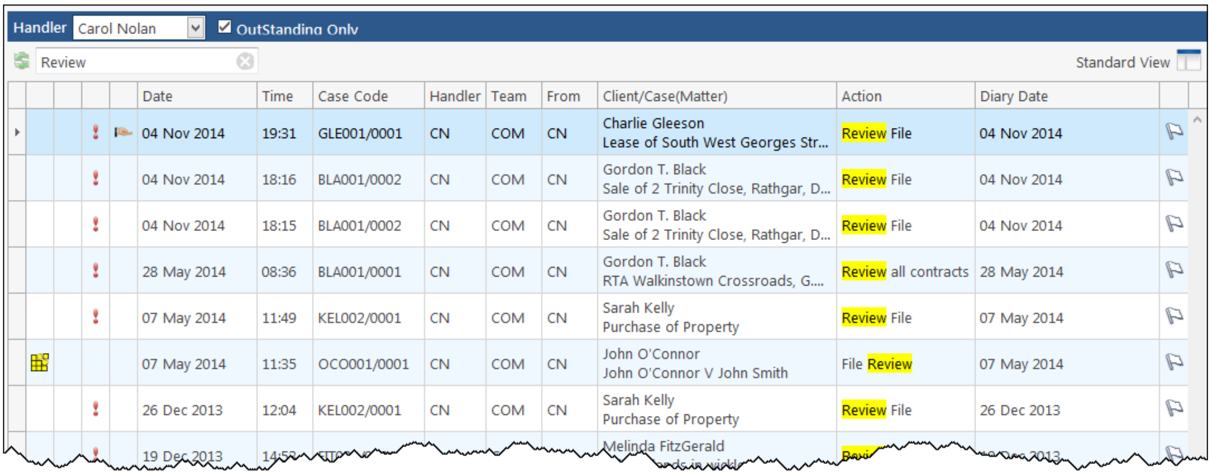
Searching, Sorting, Filtering and Grouping Tasks

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.

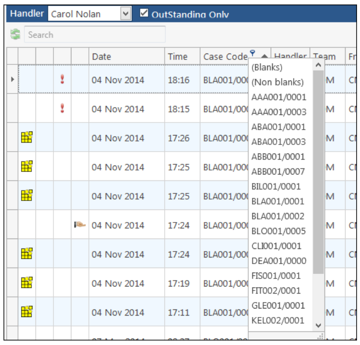


3. To clear the search results, click **Clear**. 

How to Sort Column Headings in the Task Manager

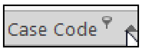
1. Click on the required **column heading** to sort by that column.

2. Click on the column again to reverse the order.



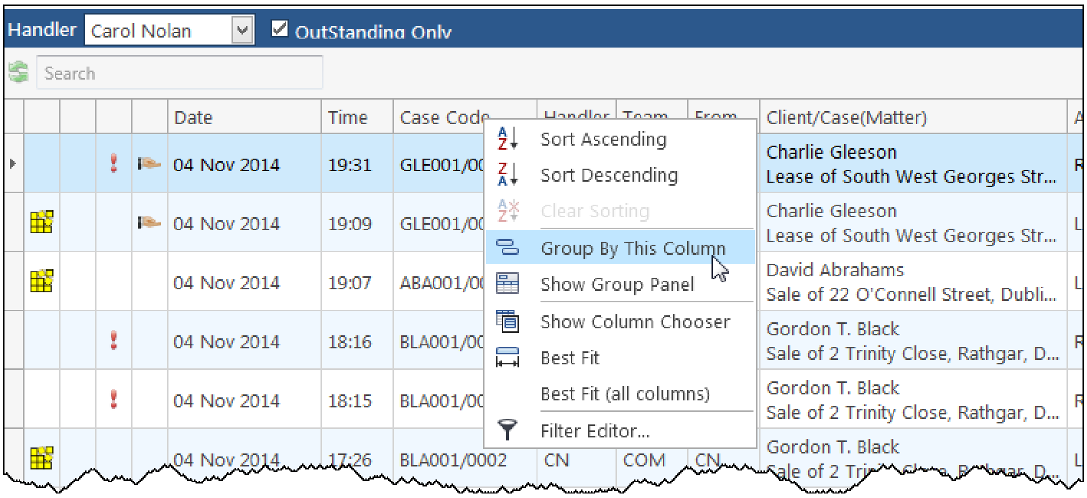
How to Filter the Task Manager

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

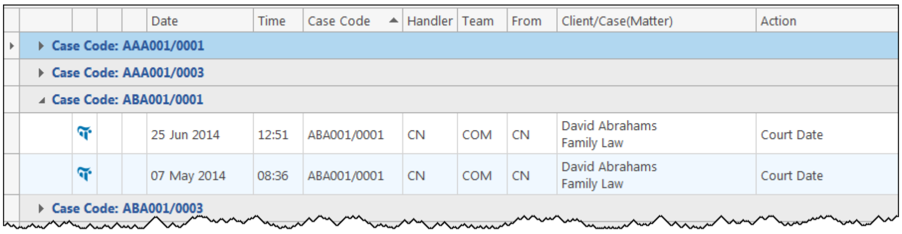
How to Group by a column heading in the Task Manager

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



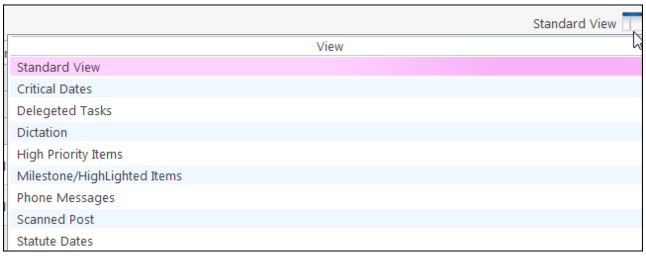
2. Click on **Group By This column**. See the following example of a grouping by fee earner

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

5. Click on standard



Working with Tasks

Accessing a Case Diary from the Task List

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

How to Generate Documents

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

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

How to View the Documents of a Task

1. **Right click** on a task and select **Open Document** from the pop-up menu.

2. The documents will open in Word.

How to play a Dictation

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

NOTE: This requires that Keyhouse Digital Dictation be installed.

How to Mark a Single task as Complete

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

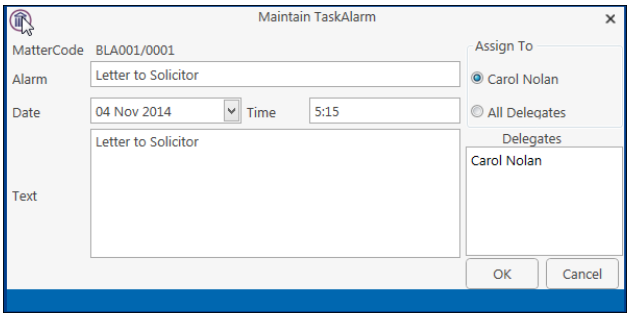
How to Tag Several Tasks and Mark as Complete

1. Hold down the **Ctrl** key and click multiple tasks to select them.

2. **Right click** and select Complete Action from the pop-up menu.

How to Alarm an Action/Case

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



2. Using the drop-down arrow set a **Date**

3. Input a Time for the alarm.

4. Assign it to yourself or all delegates.

5. Click **OK**.

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

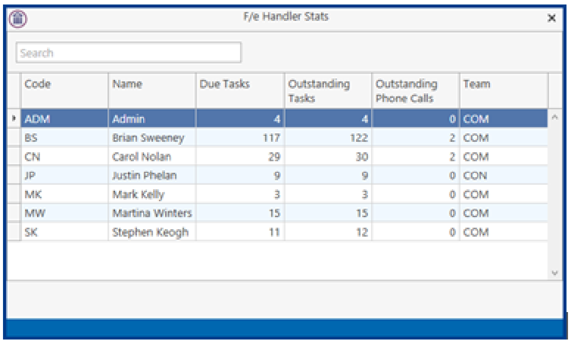
NOTE: The Alarm option must be activated by the System Administrator as it is a system wide option

View Other Users' Tasks

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

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

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


F/e Handler Stats

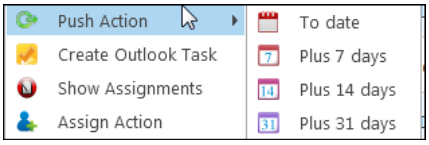
Search

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

4. Click on the X to close the dialog box.

How to Push a Task

1. **Right click** on a task and select **Push Action** from the pop-up menu

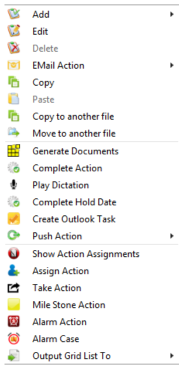


2. The task may be pushed back 7, 14 or 31 days or to a specified date selected from the calendar.

How to Create an Outlook Task

1. **Right click** on a task and select Create Outlook Task from the pop-up menu.

2. 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.

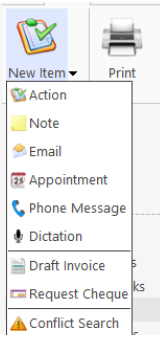
1. **Right click** in the task list, to see the pop-up menu.
2. Click on **Tag All**.

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

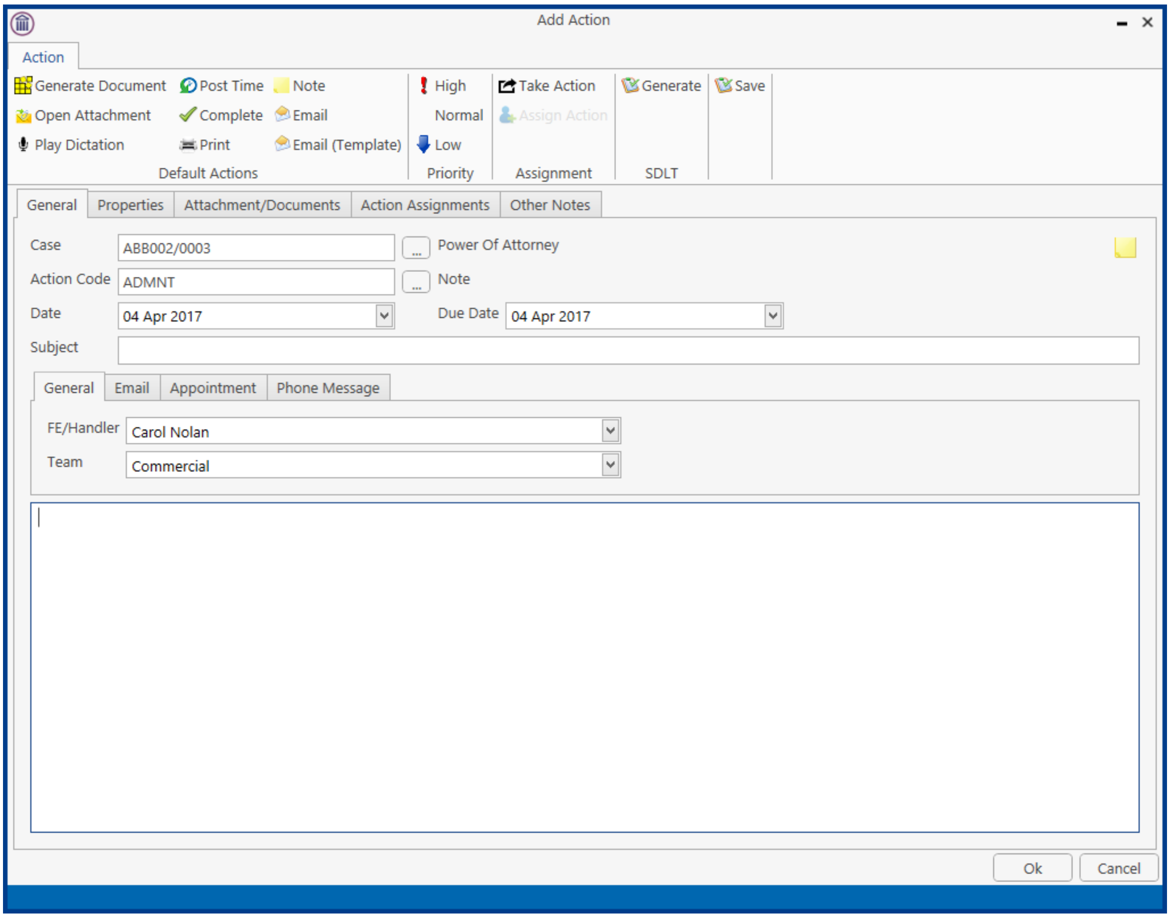
3. **Right click** again in the task list to bring up the menu again.
4. Click on the required function e.g. **Complete Action**.

How to Add a New Item

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



3. The following window will appear.



4. **Enter** the information required:

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.

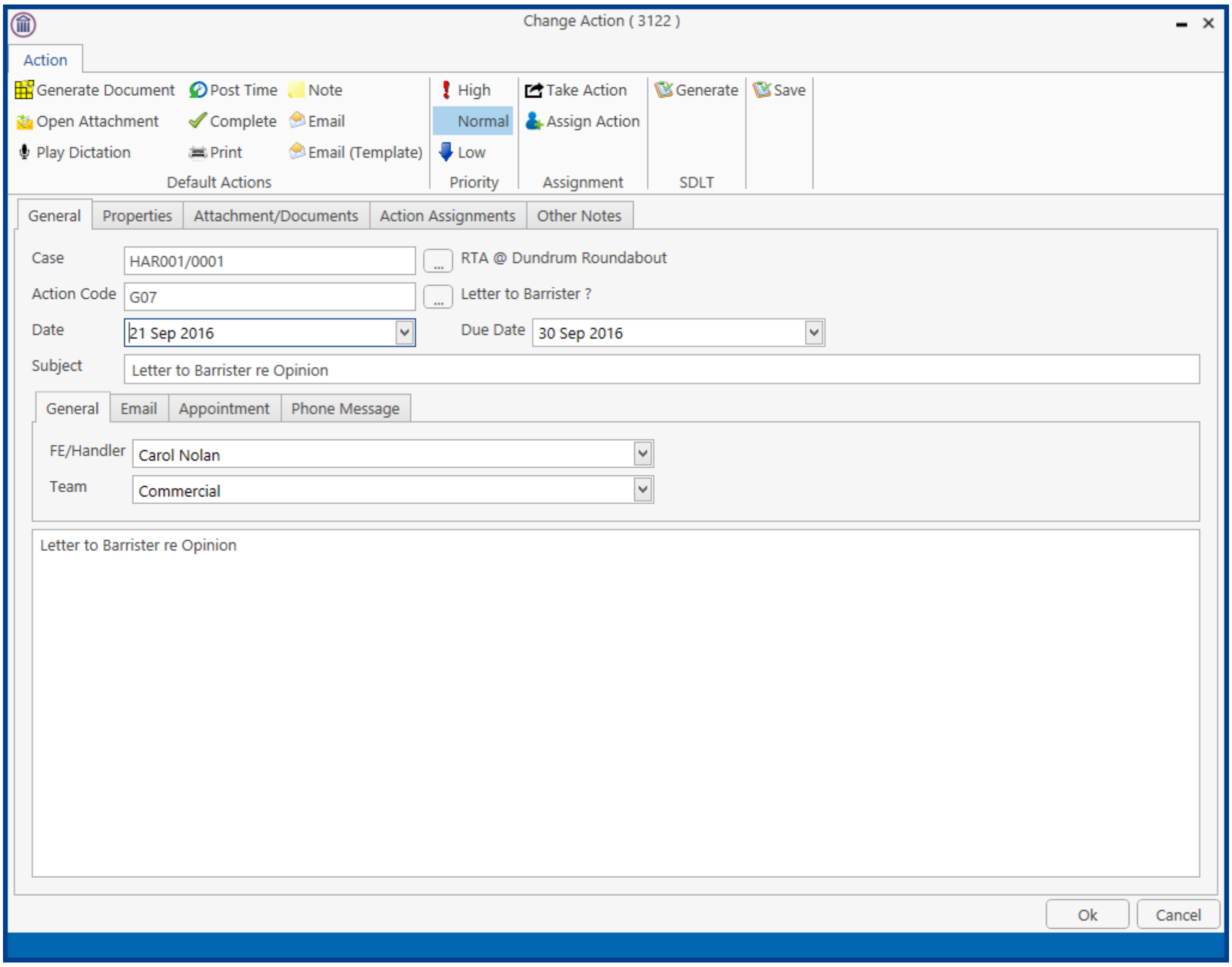
Description Input a description in the box provided.

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

How to Edit a Task

1. **Right click** on the task to be amended and select **Edit** from the pop-up menu.

2. The action will open for editing.



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

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

How to Delete Tasks

1. **Right click** on the task to be deleted and select **Delete** from the pop-up menu.

2. Click **Yes** to confirm that you wish to delete the task.

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

Assigning Tasks

How to recognise Assigned Tasks

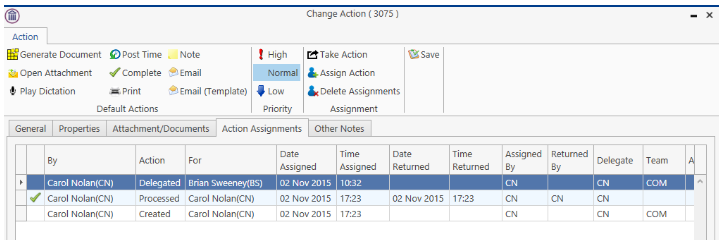
If another handler assigns you a task it will appear in your Task List. It will have a hand symbol next to the task to notify to you that it is an assigned task, as in the example below. When the task is assigned to you the Handler will display your initials and the From will display the initials of the person who assigned it to you.

		Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action
!		30 Apr 2018	09:29	ABB001/0005	BH	COM	CN	George J Abbott RTA The Rise, Stillorgan	Review File

> **Note** If you are assigned a task, generate and complete the task as normal. For further details see Chapter 4: Case Diary - Working with Tasks - Assigning Tasks to another User (p.64).

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.

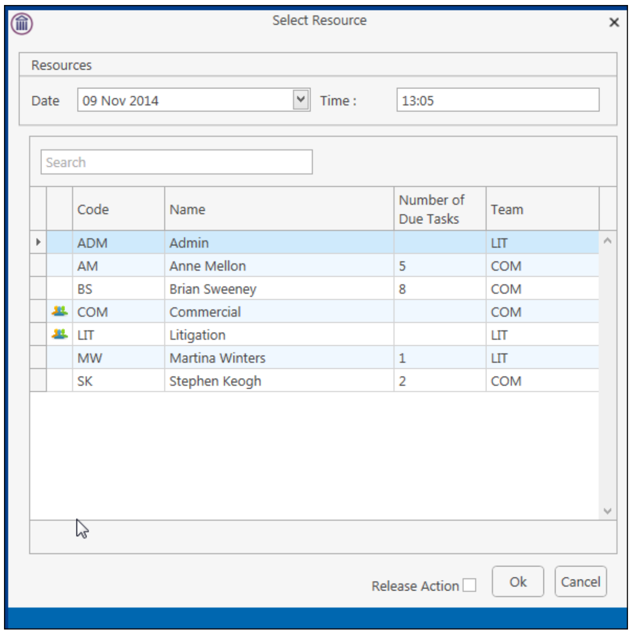


How to Assign a Task to another Handler

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.

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

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



> **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.

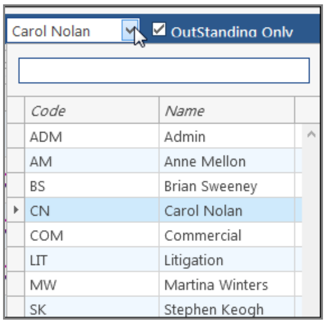
Only the **owner** of the task can **change** the Due Date on a delegated task.

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

How to take a Task

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

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

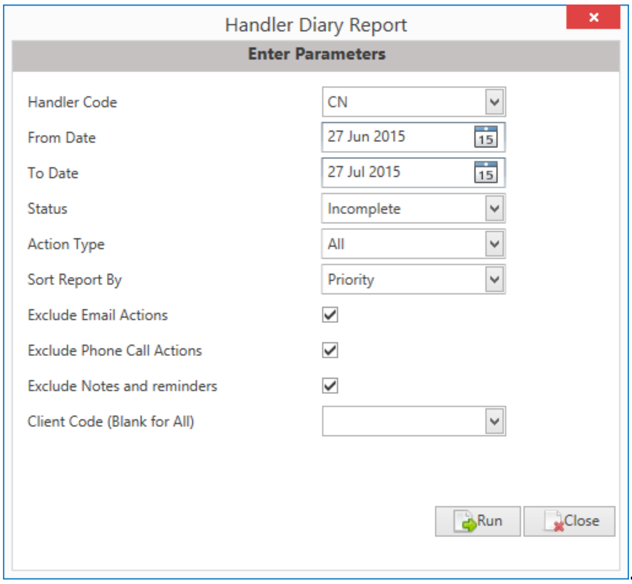


3. Return to your task list by selecting yourself from the list of users. The task will be in your task list.

Task List Options

Print your task list

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



.

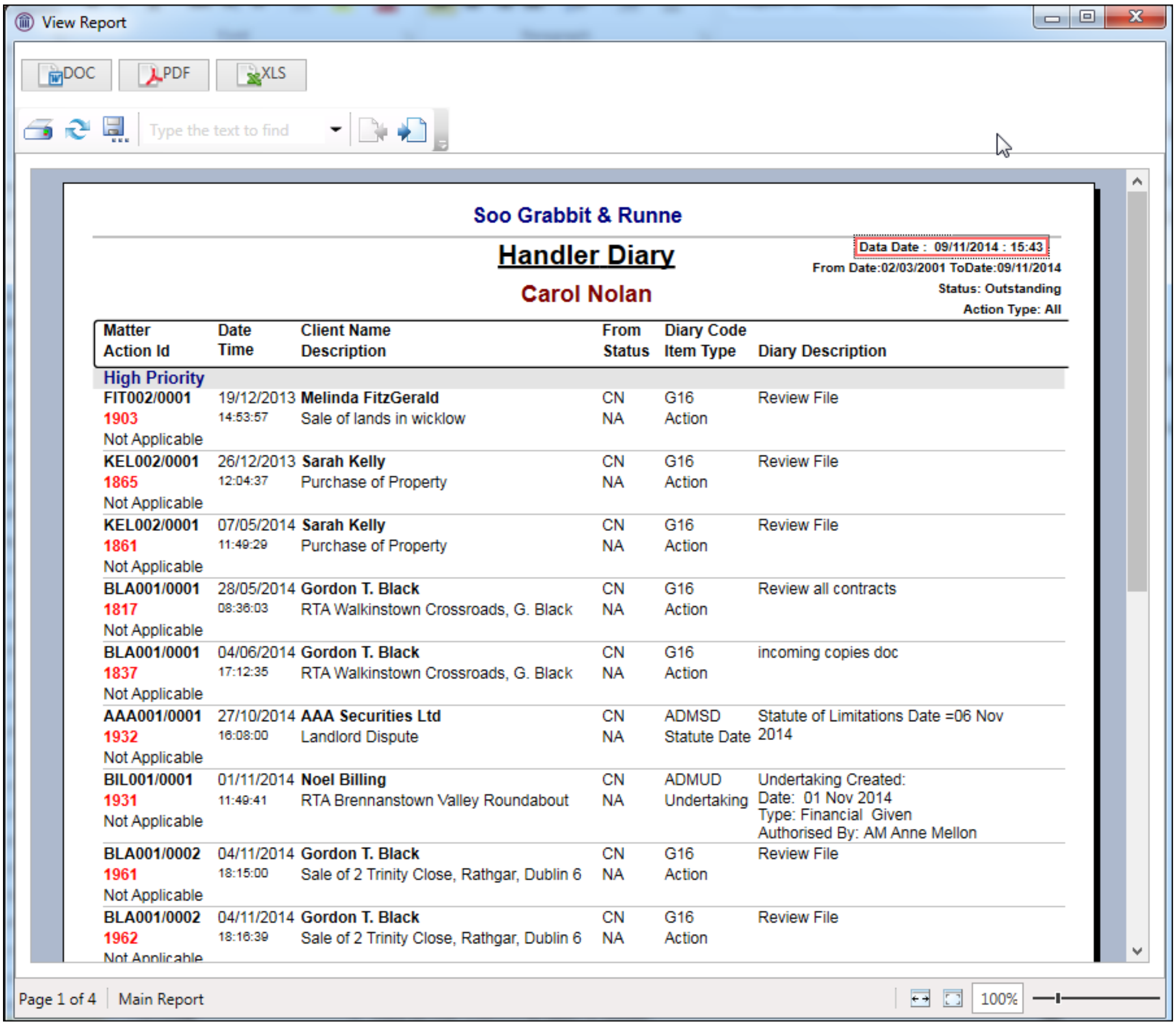
Include Closed: Check to include closed items

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

Select the status:	It will default to Outstanding; use the down arrow to change to All or Complete, if required.
From Date:	Using the calendar to select the start date
To Date:	Using the calendar to select the end date
Action Type:	This will default to All; to narrow the criteria select the action type using the down arrow.
Select the field to sort by:	Using the down arrow select the required field
Exclude emails:	Check to exclude emails
Exclude phone calls:	Check to exclude phone calls
Exclude Notes or reminders:	Check to exclude notes and reminders or exclude.

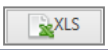
2. Click on **Run** to generate a report. 

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

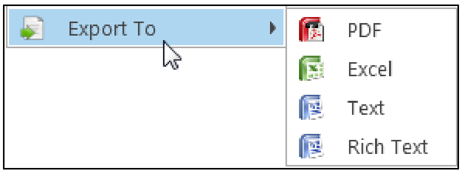


-  Word;

-  Adobe; or

-  Excel.

How to Export a copy of your task list

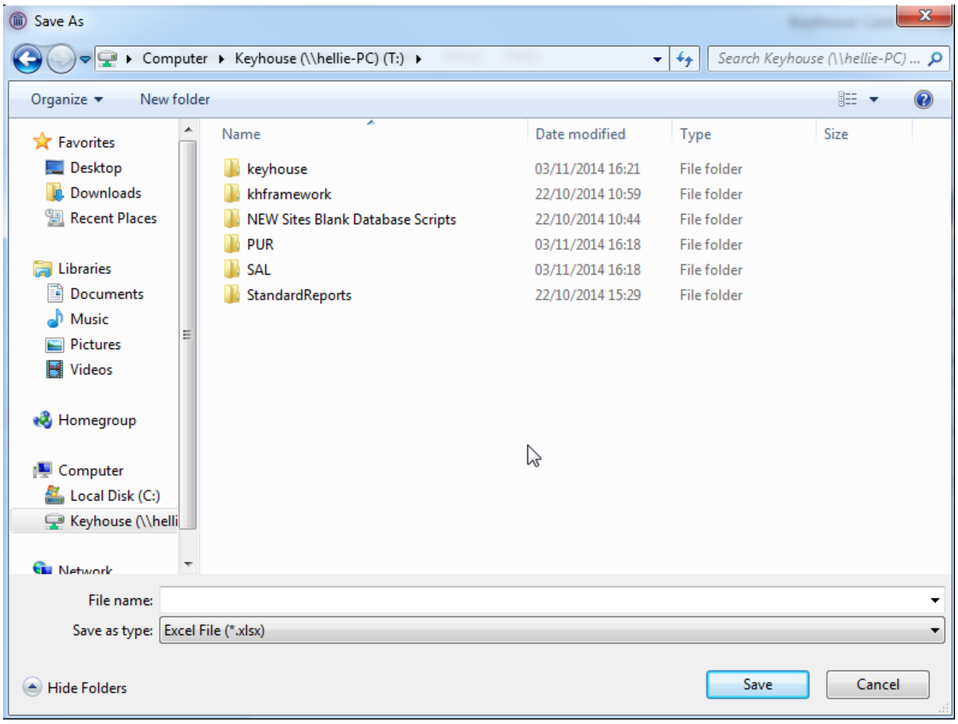


1. **Right click** in your task list and select **Export To** from the pop-up menu.

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** dialog box will appear, with the chosen file type selected. Name the file and choose a location in which to save it.



4. Click **Save**.

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

Chapter 7: Know Your Client

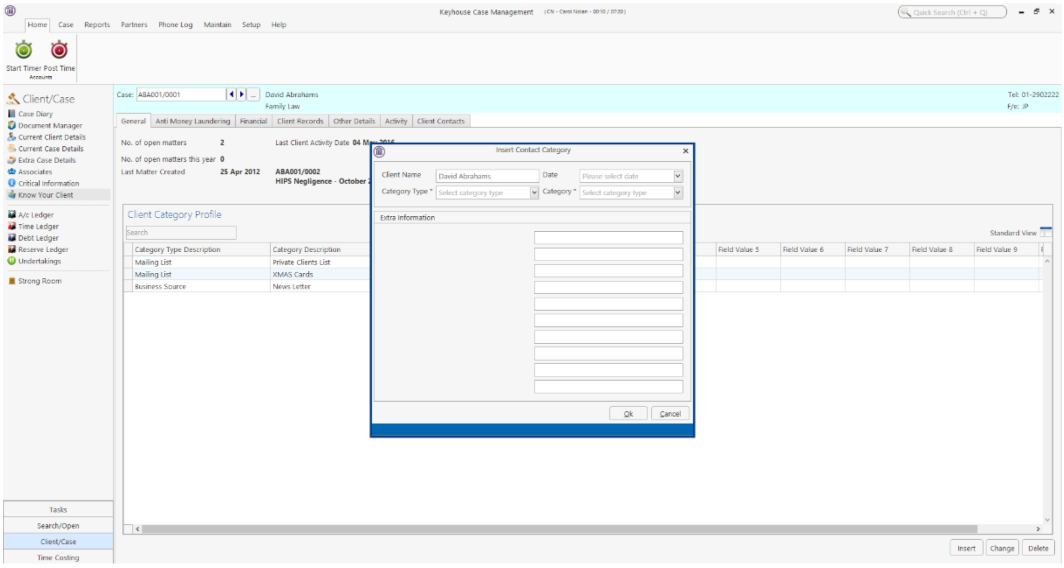
Know Your Client

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

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

General Tab

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



2. Enter the Date, Category Type and Category and any additional information.

3. Click OK.

4. The new Category will appear in the list.

Anti-Money Laundering

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

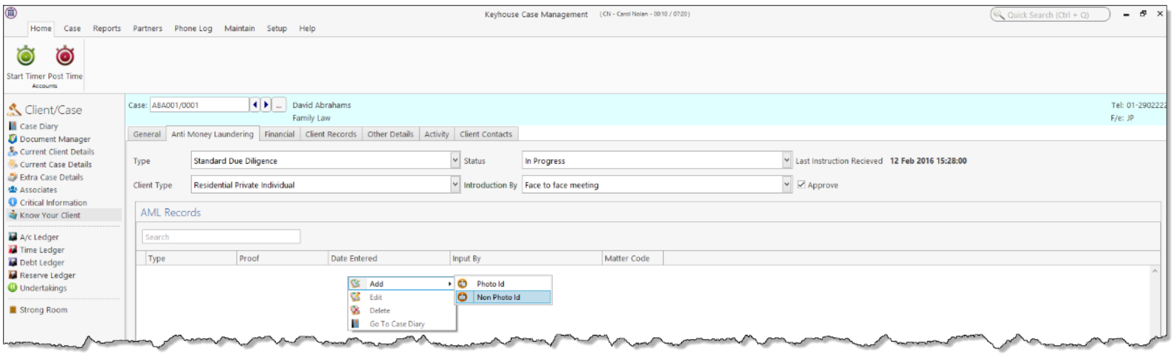
Type: The type of AML carried out e.g. Standard Due Diligence, Enhanced Due Diligence etc.
Client Type: Relates to the client category e.g. Corporate, Charity, Public Sector etc.
Status: Records where all checks are complete or are still in progress
Introduced By: Records how the client was introduced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

These categories are in line with Law Society Guidelines.

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

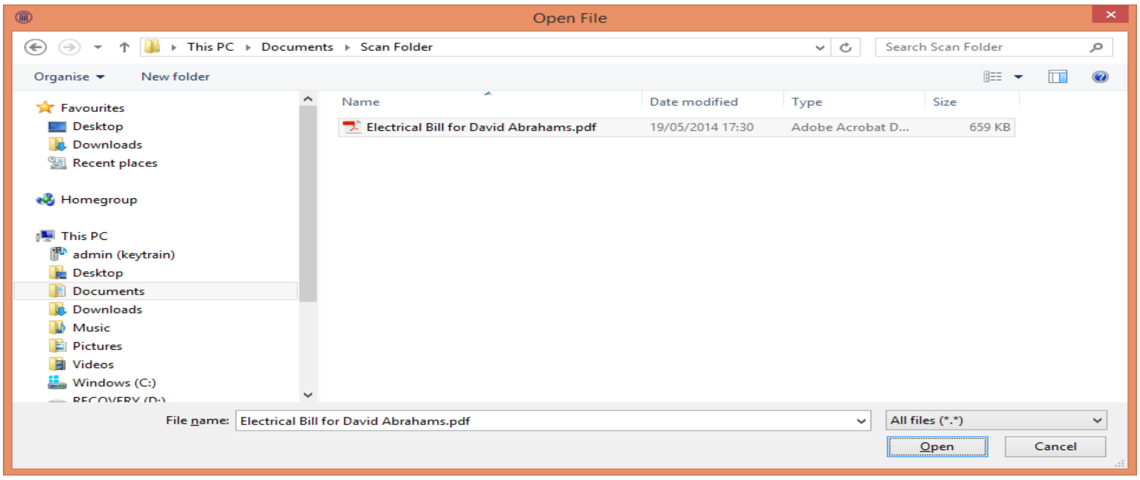
Document can be added to this screen from outside Keyhouse and documents already in Keyhouse can be set to also appear on this screen.

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

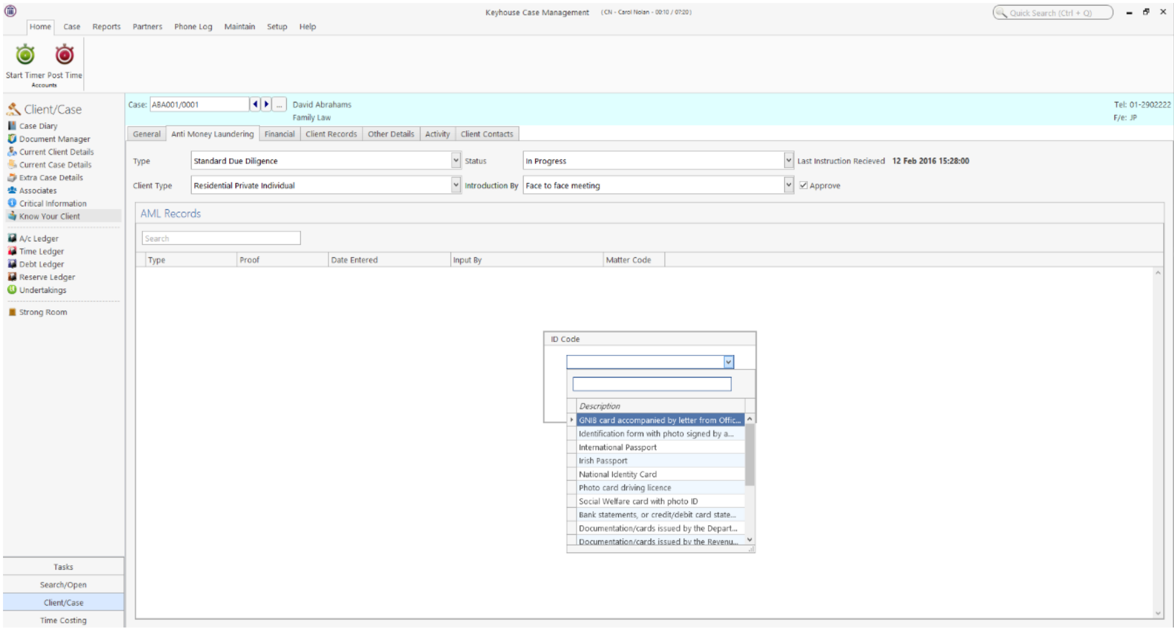


2. Then select whether the document is **Photo ID** or **Non-Photo ID**.

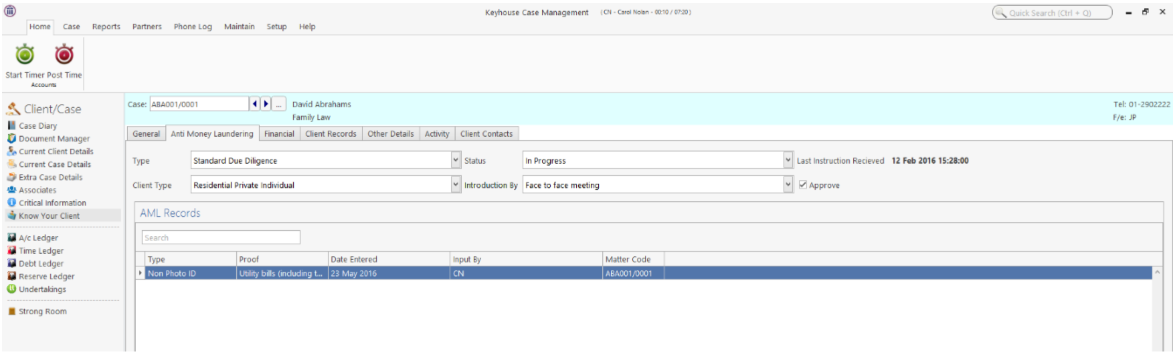
3. **Navigate** to the location where the document is stored and select the required document. Click **Open**.

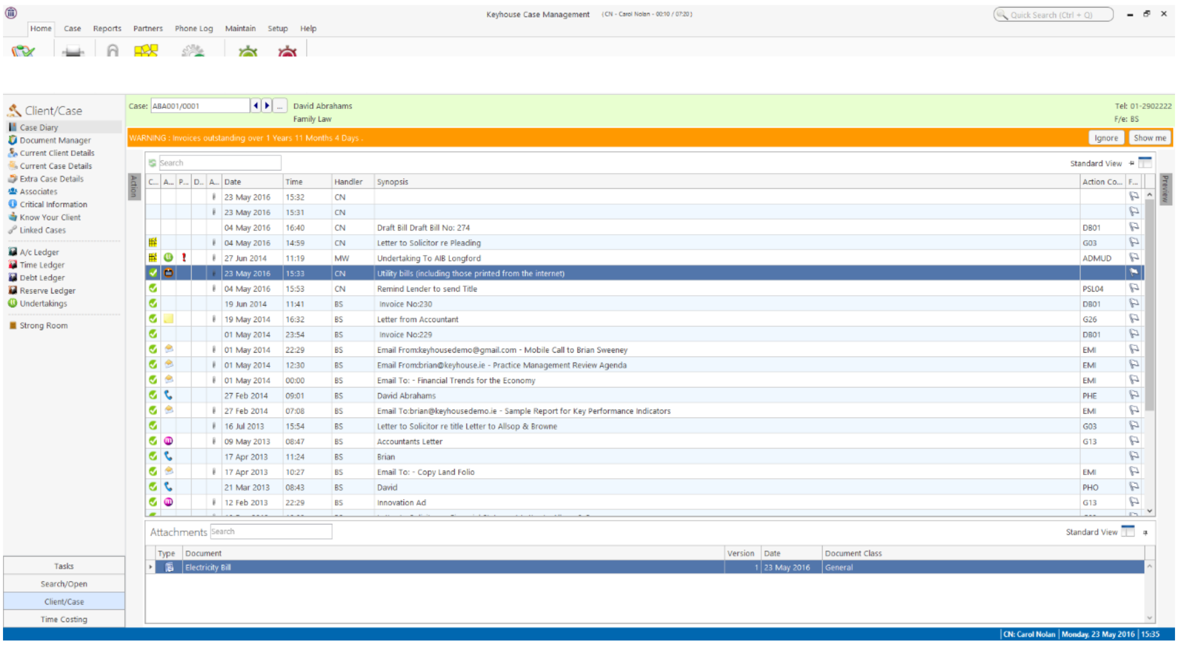


4. Select the type of ID supplied



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

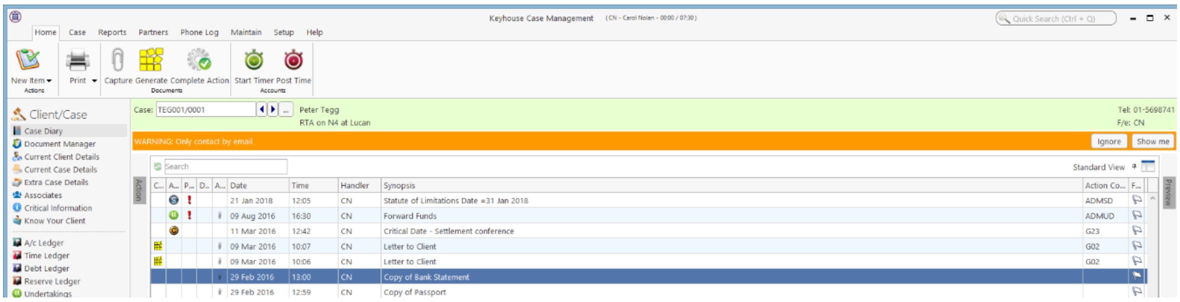




Adding Existing Documents to AML Screen

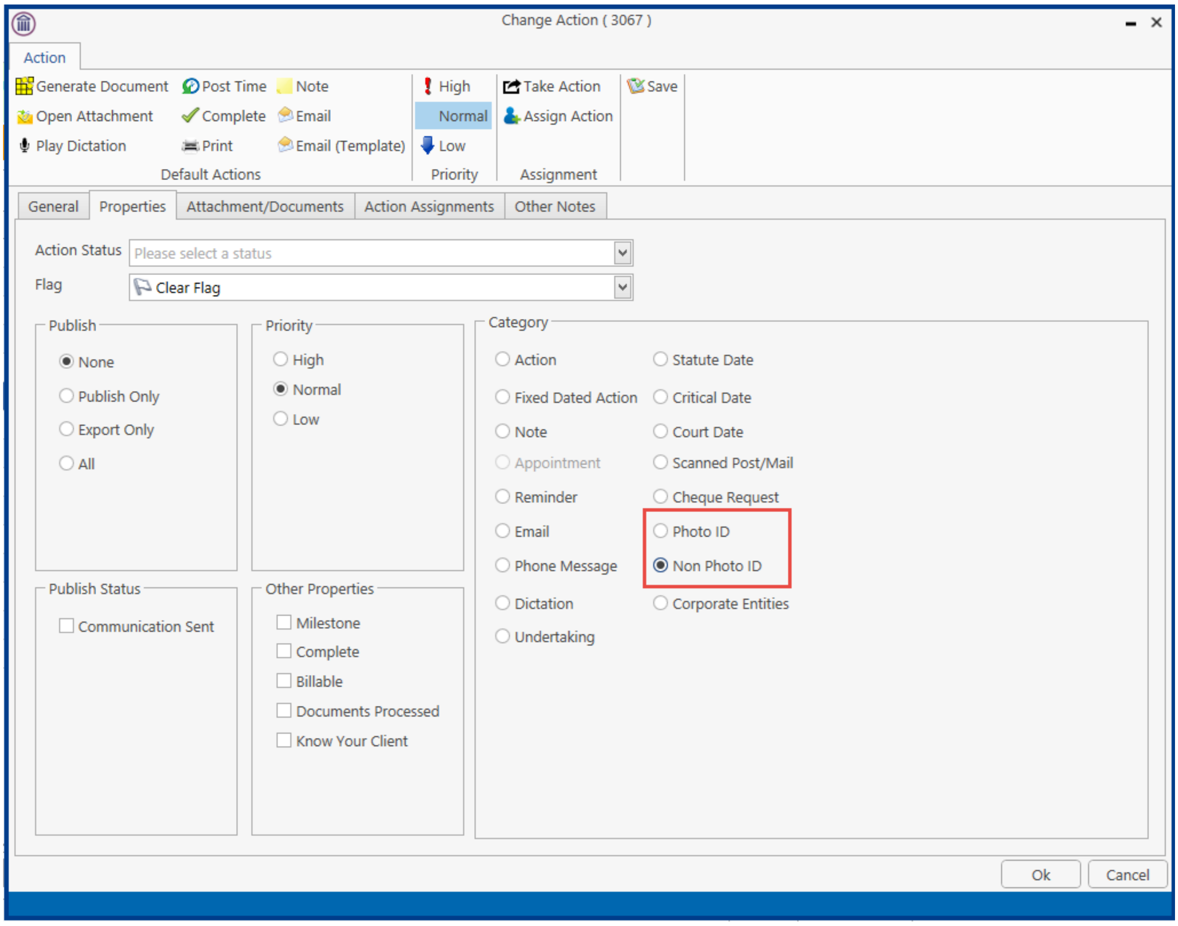
1. Go to the **Case Diary.**

2. Select the **Action** required.



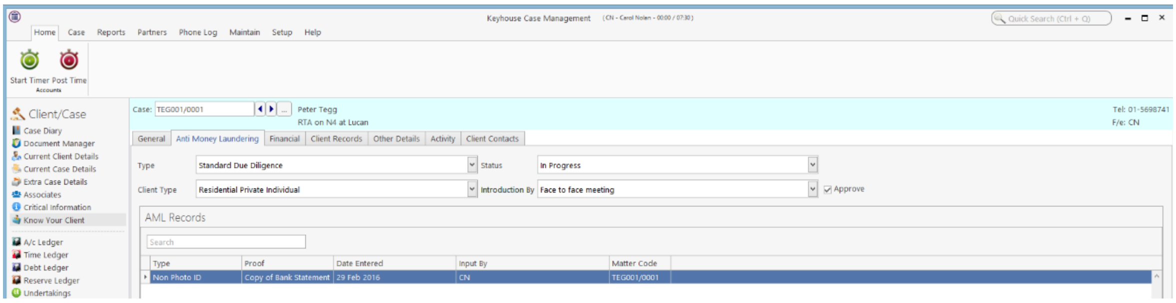
3. Right click and select Edit.

4. Click on the Properties Tab and tick Photo ID or Non-Photo ID, then OK



5. Complete the action.

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

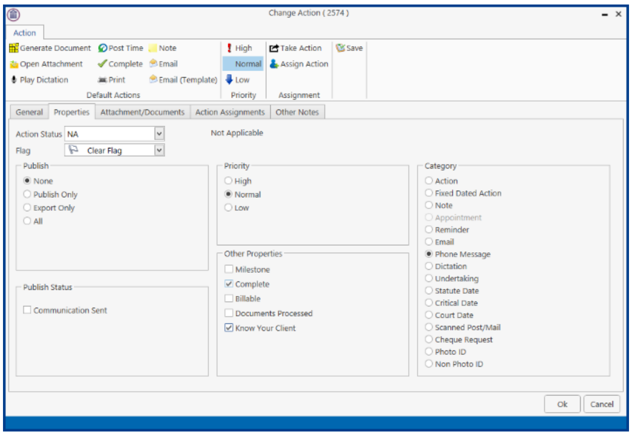


Client Records

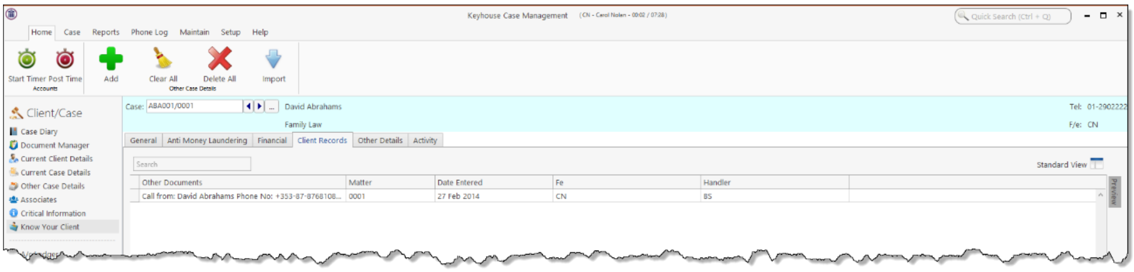
Documents related to the client rather than to a specific matter can be added here e.g. a Service Level Agreements, Marriage Certificates, Birth Certificates etc. This will ensure visibility regardless of the matter selected. For this to happen, the action must be edited and then flagged to appear in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

1. Open the Action and select the **Properties** Tab.

2. In the **Other Properties** Box, tick **Know Your Client** and click OK.

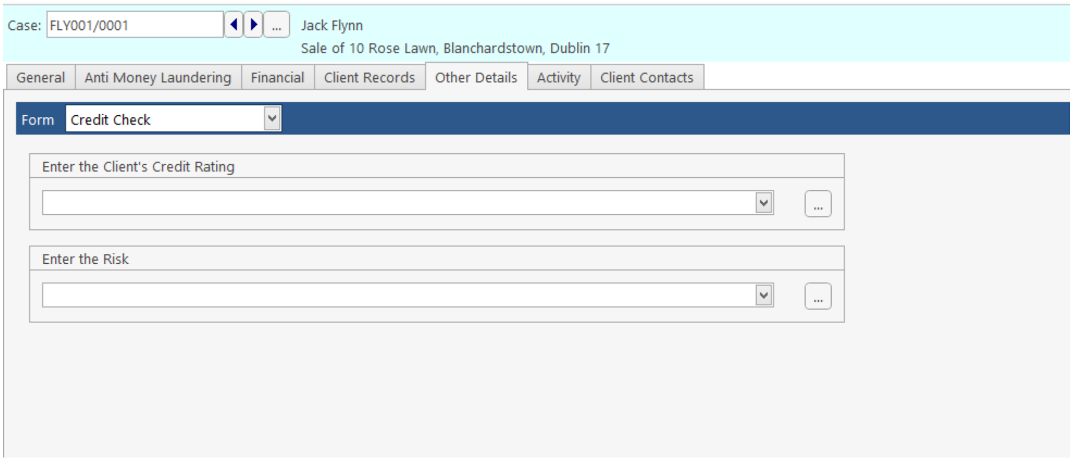


3. Return to the **Client Records** Tab on the **Know Your Client** Screen to see the action.



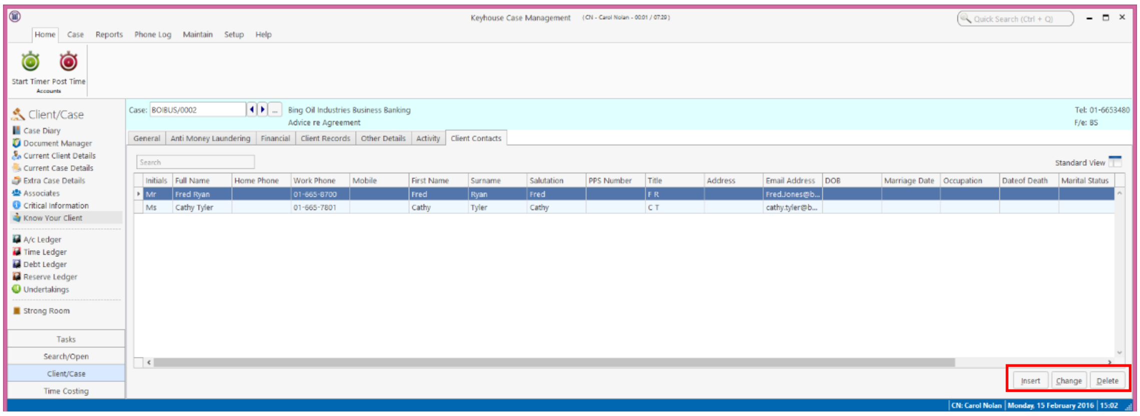
Other Details

This screen shows client specific forms. These forms hold information about the client that is not stored in other locations e.g. Credit Rating. To create a Client Other Details Form, see the Administrator User Manual.



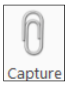
Client Contacts

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

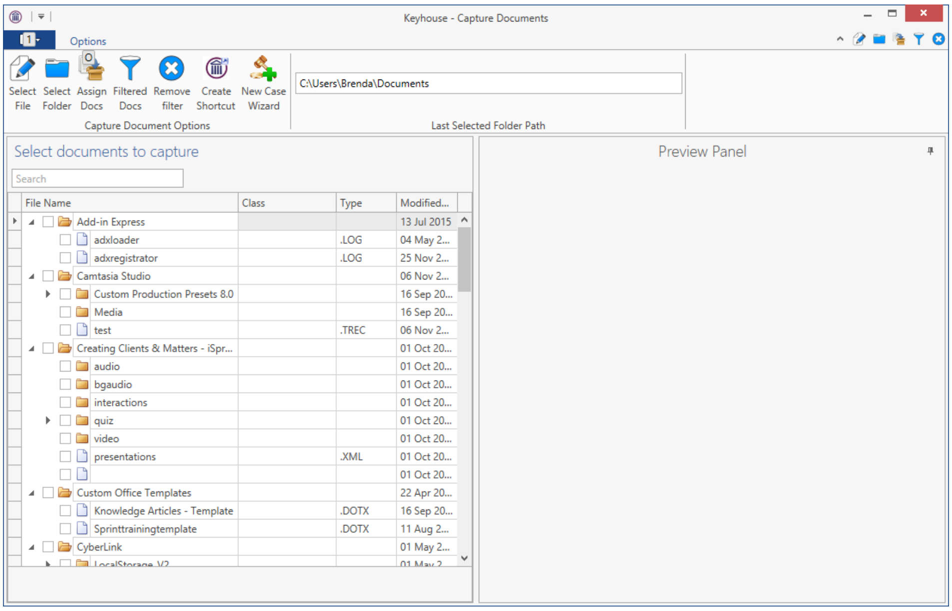


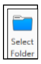
Chapter 8: Keyhouse Capture

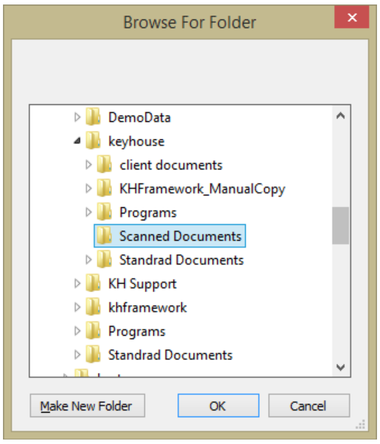
How to Capture a Folder



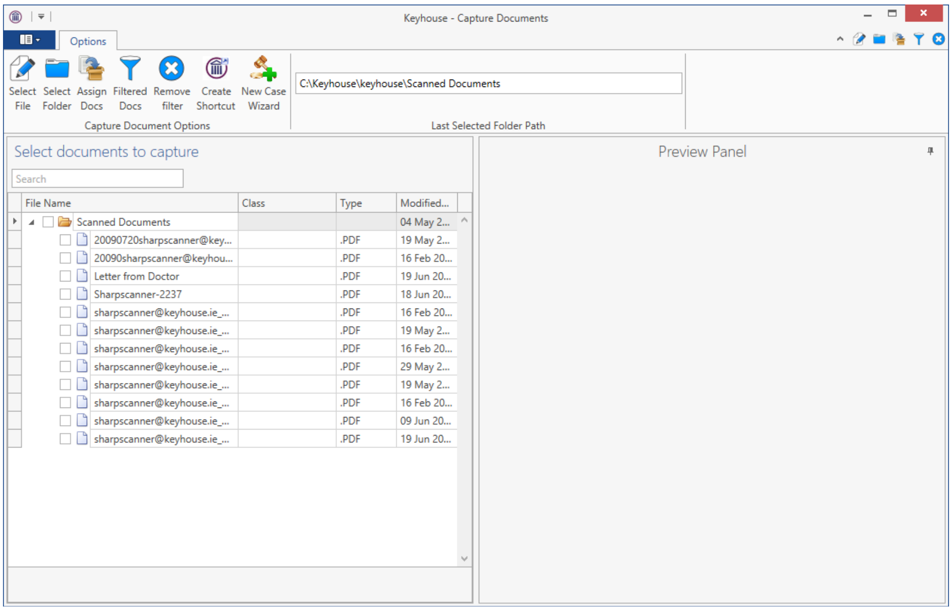
1. Click **Capture** button on the Home tab in either the Case Diary or Task List. The Capture Button and the following screen will appear.



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



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

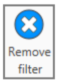


4. Click on each document in turn to preview and rename if necessary.

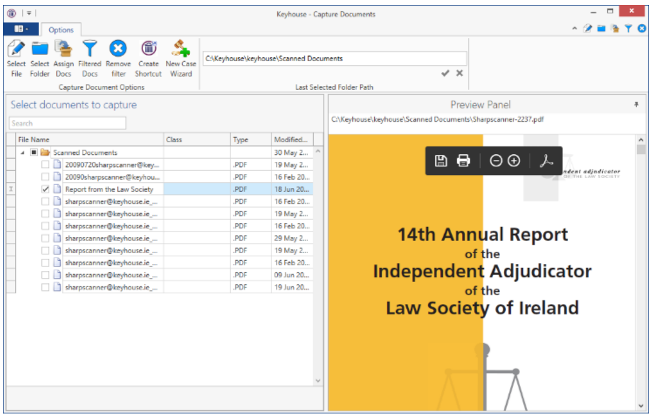
NOTE: The following symbols cannot be used when renaming documents: | \ / < > : ; *

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

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



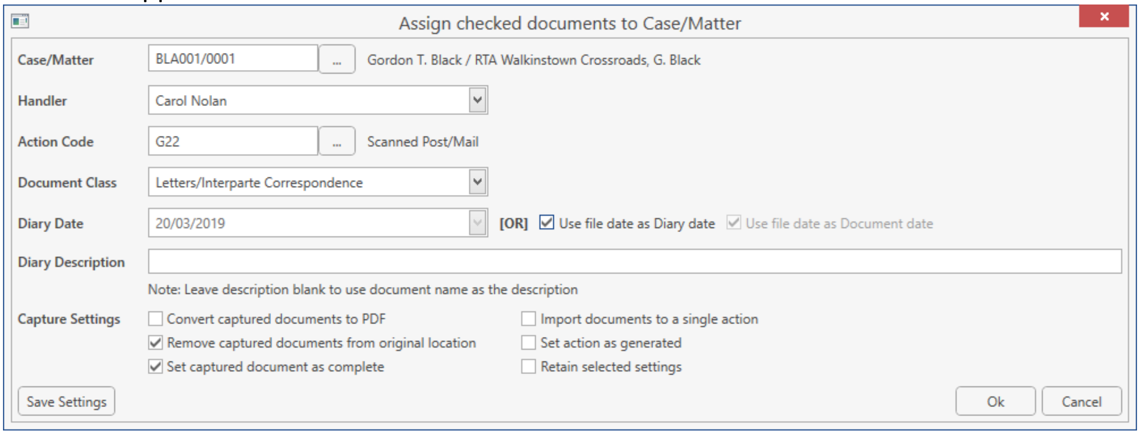
5. Tick the box to the left of the file name.



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

Tip: To exclude a file remove the tick.
To view the contents of a file, click on the view button to the right of the tick box.

6. 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.

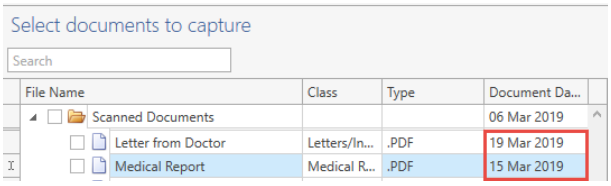
Action: Click the browse button for a list of incoming actions will appear. **Select** the required action.

Document Class: Input the correct document classification for the document being imported.

Diary Date: Enables the user to select the dates to appear in the Case Diary and Document Manager. There are different options in relation to using the Diary Date.

Diary Date - will default to today's date but this can be changed to an alternative date by unticking the Use file date as Diary date option.

Use file date as Diary date – this option will take the date of the document from the Select Documents to capture window.



Use File Date as Document date – this will enable the user to use the date for the document(s) which can be edited as above and also set the Diary Date as a different date e.g. the document(s) date and the date the document was received.

Description: Input a **description** in the Description box; if you leave this blank the document name will become the description. This is used primarily when importing multiple documents as a single action.

Capture Settings: Check the boxes as appropriate to:

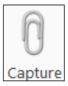
- convert documents to PDF if capturing documents that have not been scanned in;
- delete the Captured documents from original location;
- import documents to a single action (the alternative is that each document will get its individual action in the case diary);
- mark as complete the action into which the document is to be captured;

- mark the document as having been generated.

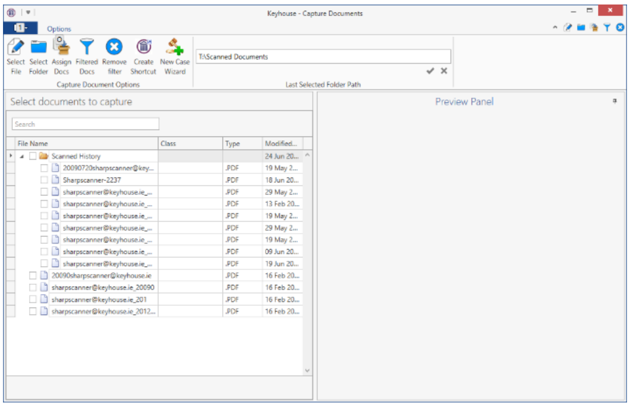
Tip: Click **Save Settings** to keep these settings for future documents captured.

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

How to Capture a File

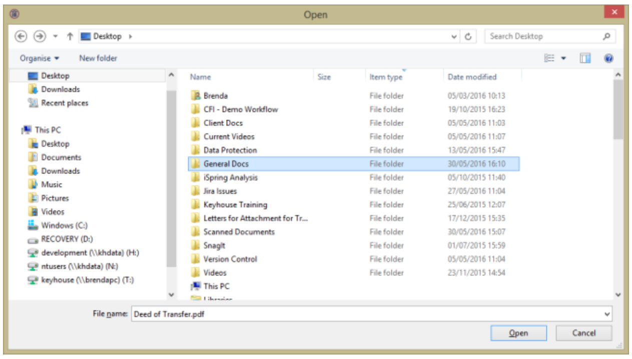
1. Click **Capture** 

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

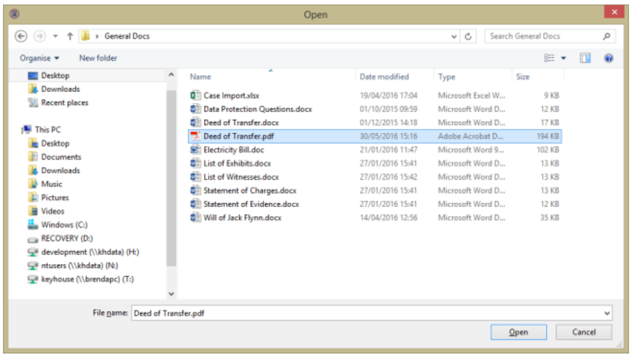


2. Click **Select File**. 

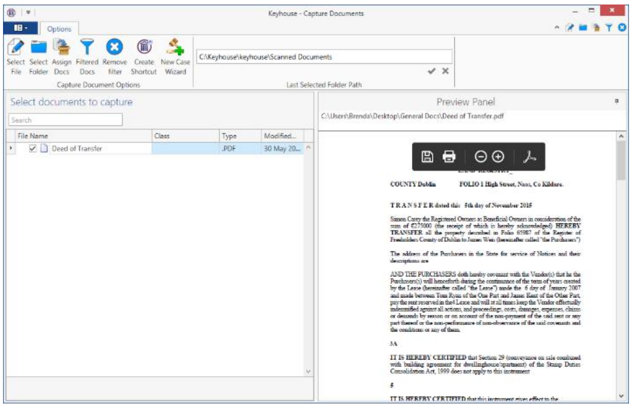
3. A Windows **Open** dialog box will appear. Browse and locate the file that is to be captured.



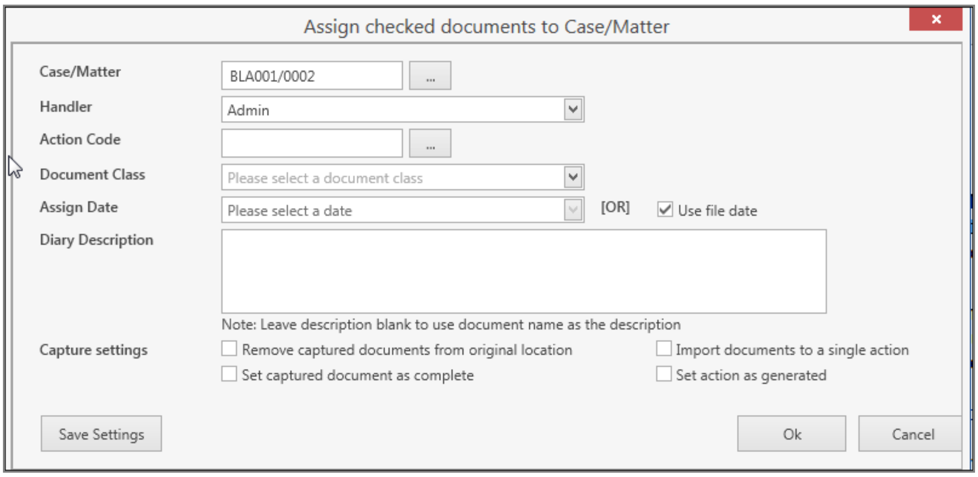
4. Click on the file and click on the Open button. The chosen document will be listed on the left-hand side of the **Capture Documents** window.



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



Provide the following information:

Case: The Case will default to the current case. To select a different case, click ... the browse button; this will bring up a matter list. Select the required case.

Handler: The Handler will default to the current handler; select an alternative from the drop-down list, if required.

Action: Click the browse button for a list of incoming actions will appear. **Select** the required action.

Description: Input a **description** in the Description box; if you leave this blank the document name will become the description.

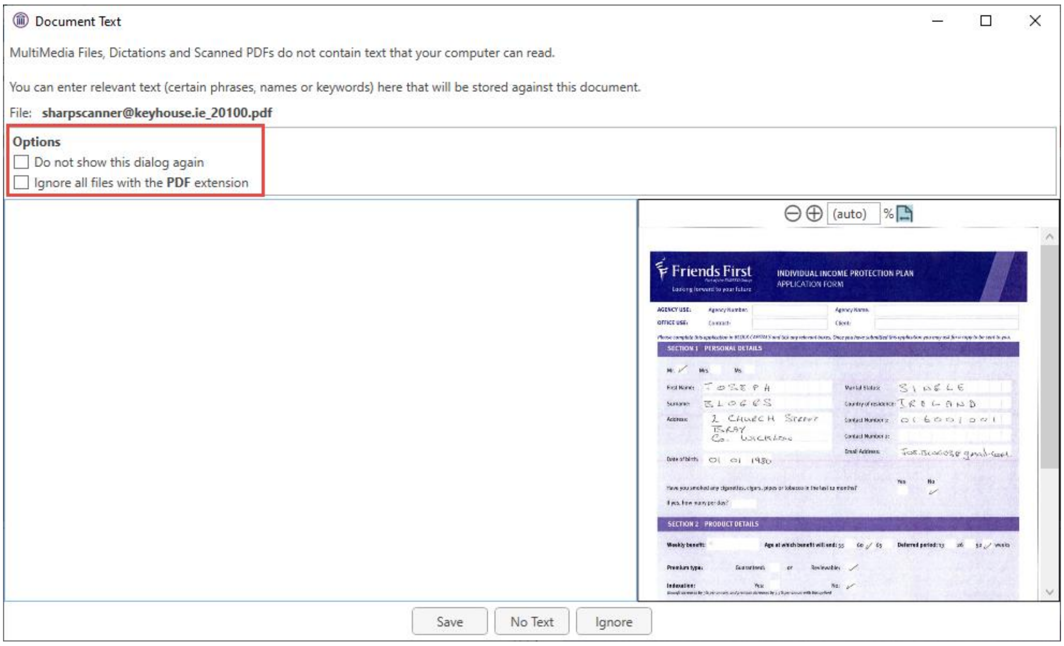
Capture Settings: Check the boxes as appropriate to:

- delete the Captured documents from original location;
- import documents to a single action (the alternative is that each document will get its individual action in the case diary);
- mark as complete the action into which the document is to be captured;
- mark the document as having been generated.

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

7. When finished click **OK**.

8. The following Dialog box opens.



9. If you do not want this Dialog box again, tick ‘Do not show this dialog box again’.

10. Click ‘Ignore all files with the PDF extension’ if you only want to be able to use this option on files with other file extensions e.g. jpeg or docx.

11. Click Save to save any change you have made.

12. Click No Text to save any options you have selected

13. Click Ignore to close the Dialog Box.

14. The files will appear in the case diary as a single action or multiple actions, depending on the options chosen.

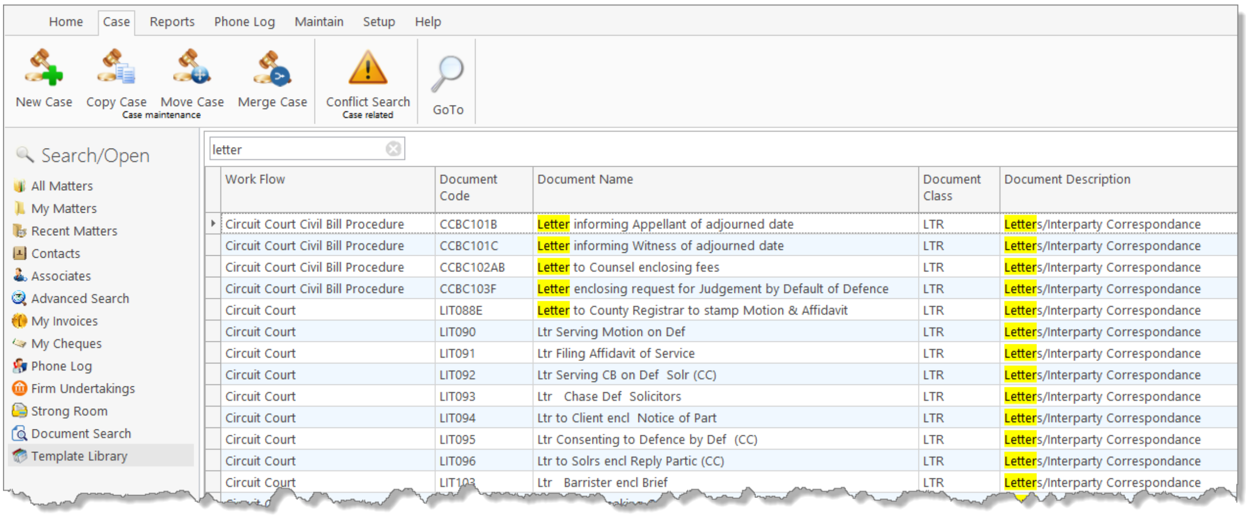
Chapter 9: The Template Library

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

How to Search for precedent documents

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

2. Click on **Template Library** the following screen will appear.

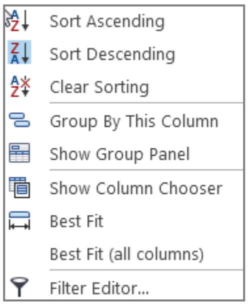


3. **Input** a key search word/s in the **Search Box.** The search results will update as you type.

4. A list of precedent documents matching the criteria will be listed in the screen below.

How to sort Column Headings in the Template Library

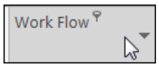
1. Click on a **column heading** to sort by that heading e.g. Work Flow

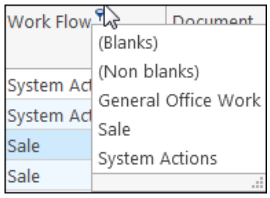


2. To return to the previous listing order, right-click in the column heading and select **Clear Sorting** from the pop-up menu.

How to apply a filter

1. To apply a filter, move your mouse over the **column heading** until a **Pin** appears; click on it for a list of terms by which the records may be filtered.





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

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

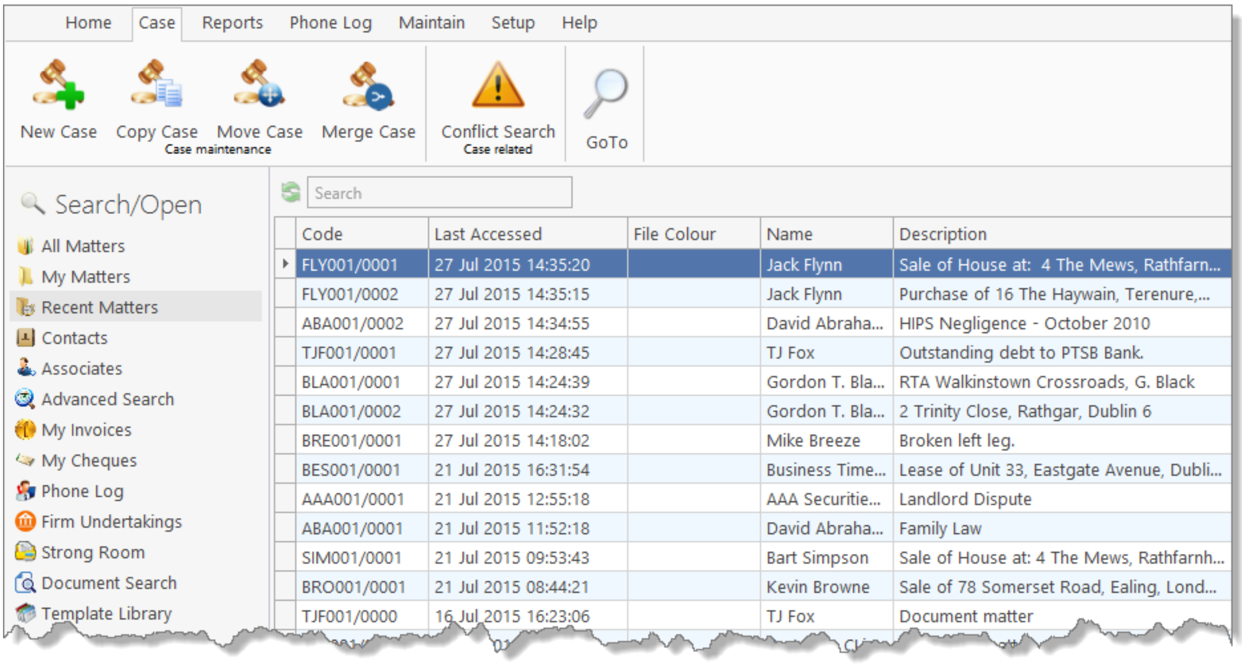
Chapter 10: Conflict Search

What is a Conflict Search?

A conflict search is a search designed to alert the user to any potential conflicts of interest; for example, if the firm is being asked to act for somebody who is/was an opposing party in previous or continuing proceedings. The fields searched are Client Name, Spousal Name, Address, 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 or click on **New Item** on the Home Ribbon and select Conflict Search.

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.

5. To further refine the search, click Add Criterion and enter a second piece of information e.g. PPS Number.

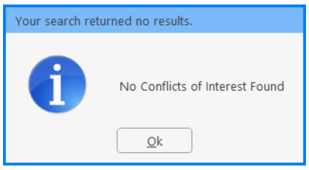
Note: The Wildcard % can be used when entering criteria to broaden the search e.g. Sm%th will return Smith and Smyth or 23 Green% will return all addresses that start with 23 Green.

6. To add another set of details to the search, click New Line.

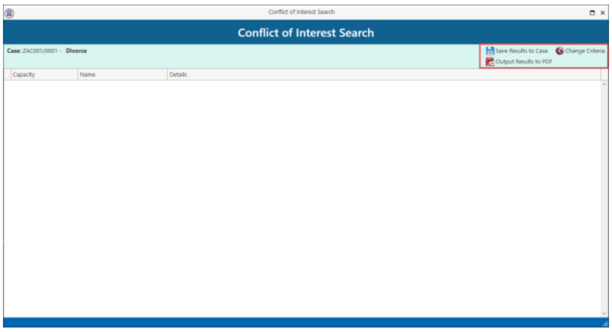
7. Click Search

8. Click Reset to clear the criteria

9. Clients cannot conflict with themselves on a matter which will led to there being no conflict results and the following dialog box will appears.

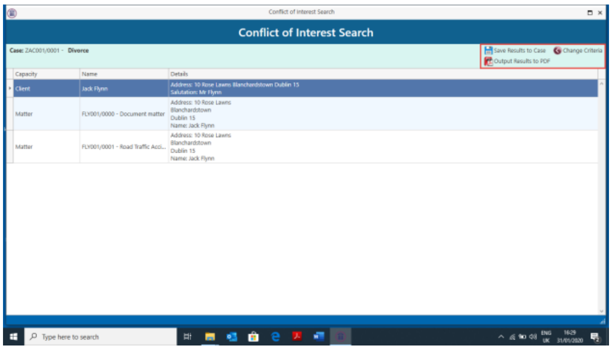


10. Click OK to generate the report. This will provide a record in the case diary that the conflict search was done.



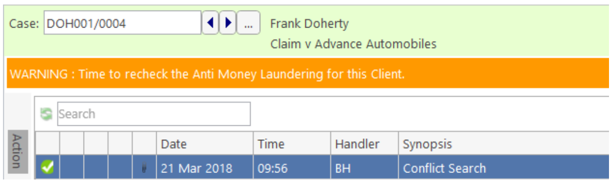
11. Click Save to Case or use the Output Results to PDF to print the Search.

12. If conflicts are found, they will appear in a report.



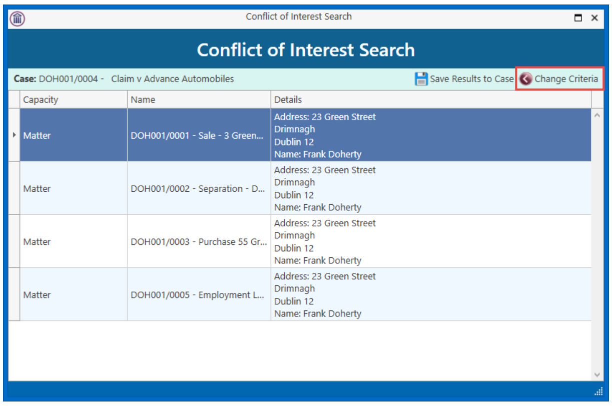
13. Click Save to Case or use the Output Results to PDF to print the Search

14. The report can then be reviewed and marked as complete.



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

15. To change the search criteria, click Change Criteria to return to the search options.

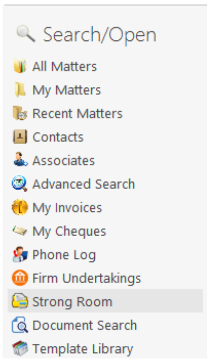


Chapter 11: The Strong Room

What is the Strong Room used for?

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

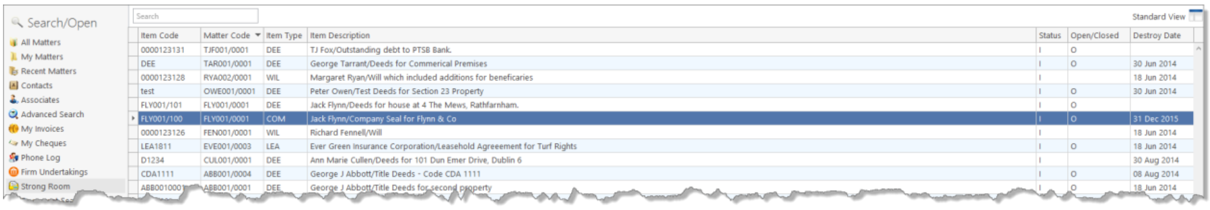
The Strong Room also keeps a record of the date the item was withdrawn and when it has been returned and by whom. The history of the item is recorded for tracking purposes.



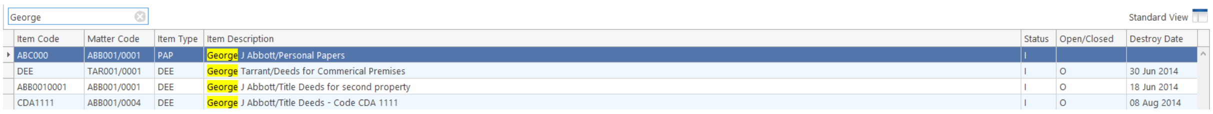
How to Search for an Item

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.



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



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

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

Tip: Additional fields can be added to the Header Row to improve the search feature. See Pg 224**Error! Bookmark not defined.** for further information.

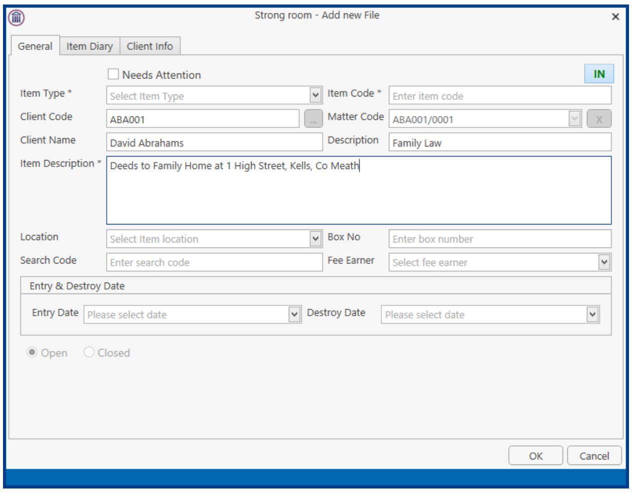
How to Add a File/Item to the Strong Room

1. If the current case is not the case in respect of which you wish to add an item to the Strong Room, Click on **Search/Open** on the navigation panel and open the required case**.**

2. Then click **Strong Room** on the Navigation panel.

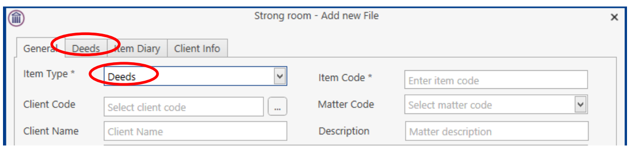
3. Click on the **Add File** icon on the Home tab. A screen with the title **Strong room — Add new File** will appear.

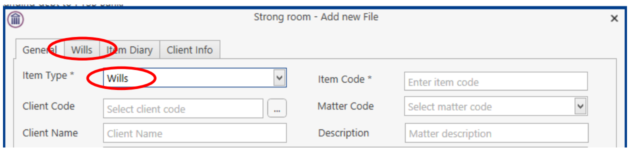
   Fields marked with an asterisk are required.



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

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

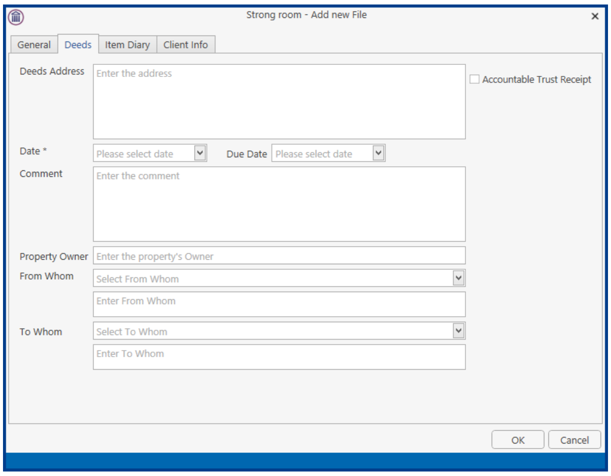




NOTE: The tabs at the top of the screen will vary depending on the Item Type chosen.

Entering Deeds in the Strong Room

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



2. Enter the **address** for the Deeds.

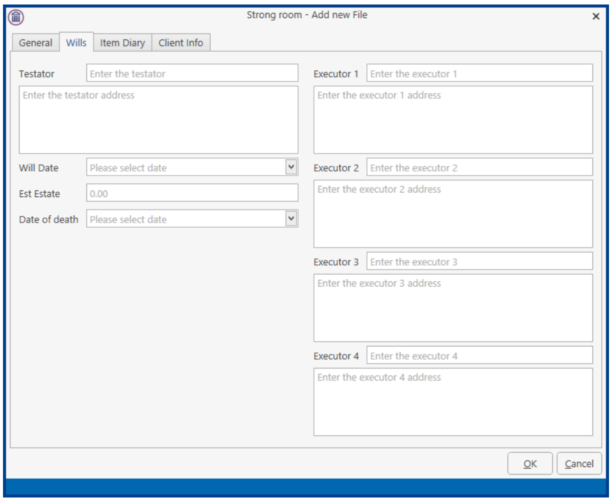
3. If the Deeds are being held on **Accountable Trust Receipt**, tick the Box. This will activate the drop downs boxes From Whom and To Whom.

4. Enter the required information.

5. Click OK.

Entering Wills in the Strong Room

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



2. Enter the **Testator** and the **Executors** and the date of the Will.

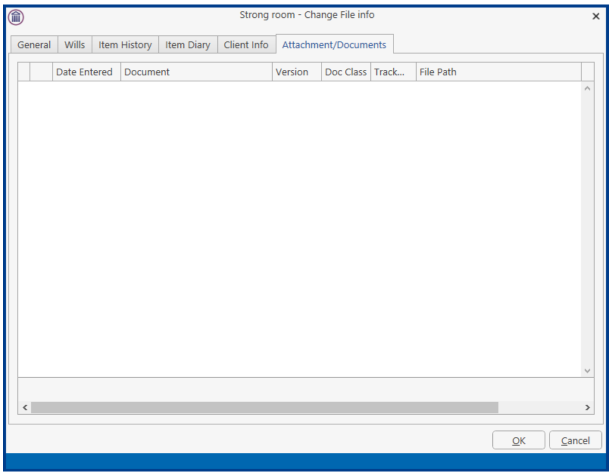
3. The **Date of death** and the **value of the estate** can also be added.

4. Click OK.

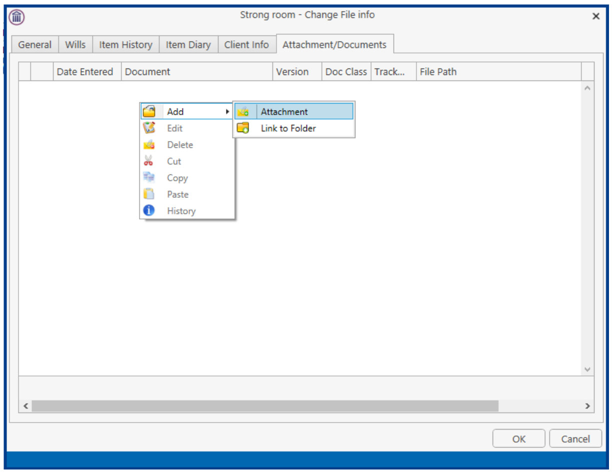
Attach a Document to a Strong Room Entry

A copy of a documents can be attached to the Strong Room e.g. a signed copy of a will. This will make the document easier to find in the matter. **NOTE**: This option is only available when the entry is associated with a matter. It is not possible to add a copy of documents when there is no client and matter associated with the entry. Should a user try to add a document, a warning will be given stating it has not been captured.

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

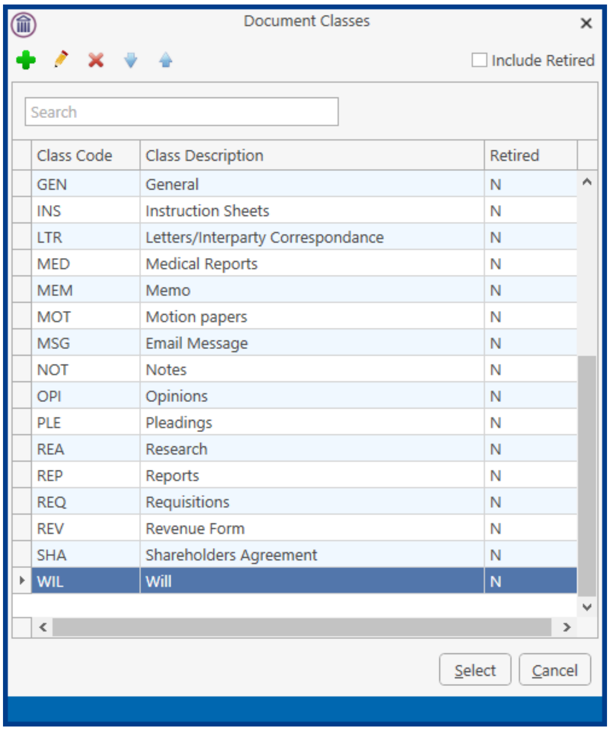


5. Right click and select **Add** and then select **Attachment**



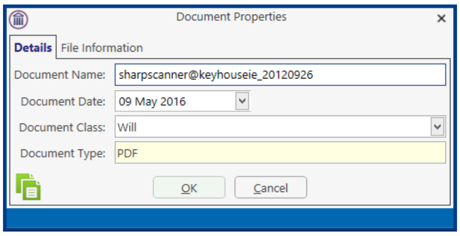
6. **Navigate** to the file location e.g. Scan Folder and select the document.

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



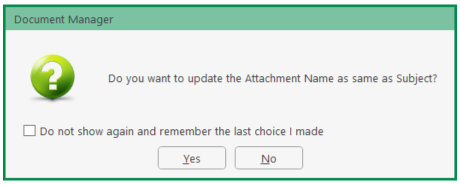
8. Select the appropriate **Document Class** and click Select.

9. It may be necessary to **rename** the document if it wasn't renamed **before** it was brought into Keyhouse. Right click on the item and select Edit. The following dialog box will appear.



10. Enter the **correct** name for the document and change the document class if required.

11. Click **OK**. You may see the following dialog box.



12. Click Yes if you want the name of the document and action in the Case Diary to be the same.

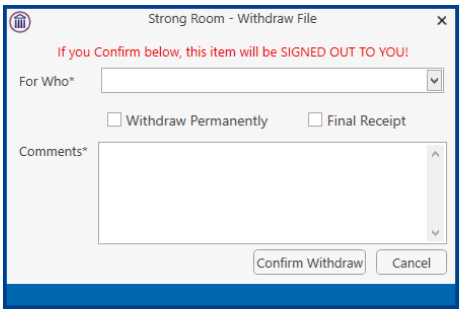
13. The document will now be visible in both the **Case Diary** and **Document Manager** as well as the Strong Room.

How to Withdraw an Item

1. Open the **Strong Room** screen, search for and select the item you want to withdraw.

2. Click on the **Withdraw file** icon on the Home tab.

> **Note** if there is only a Replace file icon then the item is already checked out.

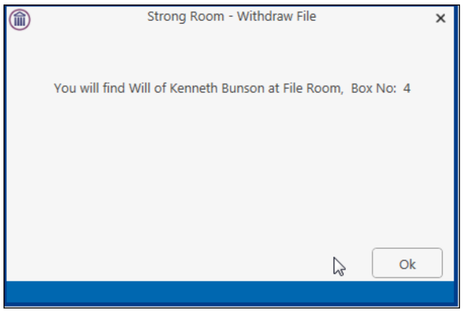


3. The system will ask for your **password**; input your **username** and **password**.

4. A Withdraw File dialog box will appear.

   Provide the following information:

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



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

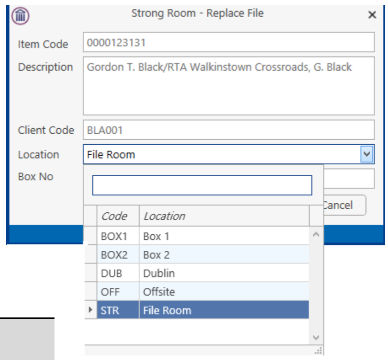
   Comment:
   Input a comment, e.g. why the item is being withdrawn.

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

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

6. Click **OK.**

How to Replace/Return an Item

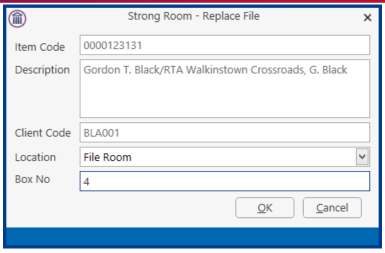


1. Open the **Strong Room** screen, search for and select the item you want to replace.

2. Click on the **Replace File** icon on the Home tab.

3. The following Replace File dialog box will appear.

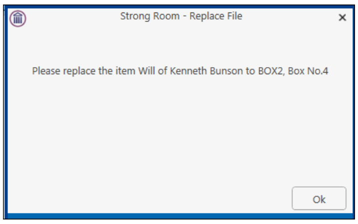
> **Note** if the **Withdraw File** tool is visible then item is already checked in.



4. Select the **physical location**, e.g. Box 2, to which the item is being returned.

5. Enter the **Box No** if required

6. Click **OK**. You will see a message asking you to place the item in the selected location.



7. Click **OK**.

Delete a file

1. Select the item to be deleted.

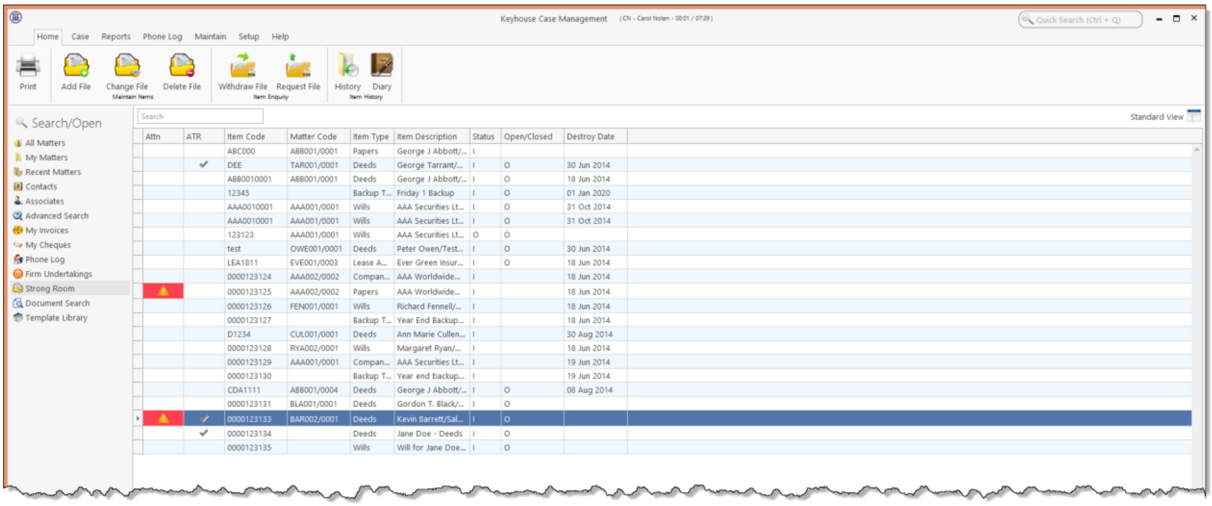
2. Select Delete File from the Ribbon at the top of the page.

> **Note** deleting the entry removes all reference to the file having been on the system. To maintain a record of the file having been removed from the Strong Room, select Withdraw Permanently.

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.**

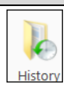
2. Then click on **Strong Room** on the Navigation panel to show the following screen listing all items in your strong room.

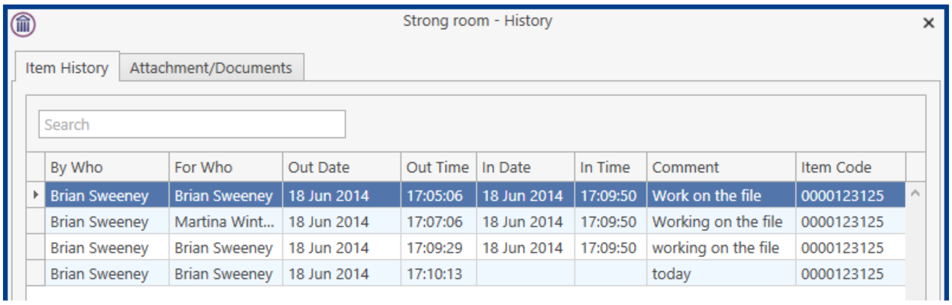


3. **Search** for the item required and select it.

> **Note** to add the Withdrawal Comment to the grid, see the section on Creating User Views in Chapter 18 – Personalise your Keyhouse (p. 219).

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





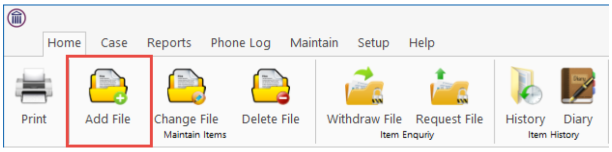
5. Click Cancel to exit this screen.

Adding a Contact in the Strong

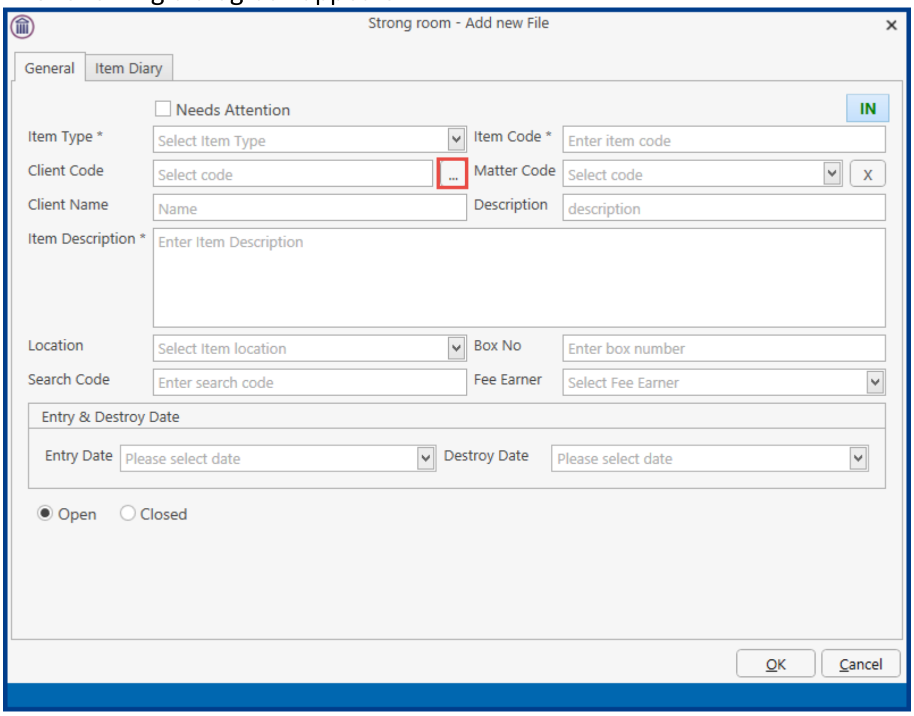
Occasionally documents may be held for people who may not be a client of the firm. A client record can be created in the Strong Room which, at a future date can be used to create a matter.

1. Click to **Search/Open** and select Strong Room from the Navigation Panel.

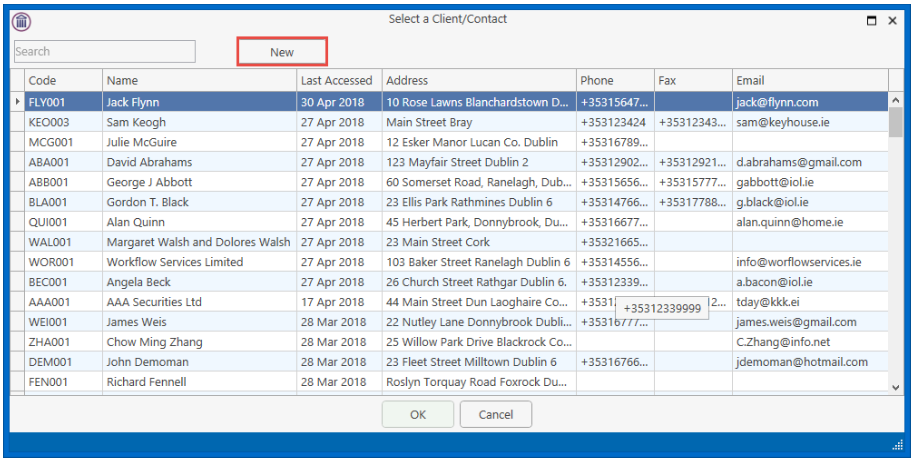
2. Click Add on the Home Ribbon



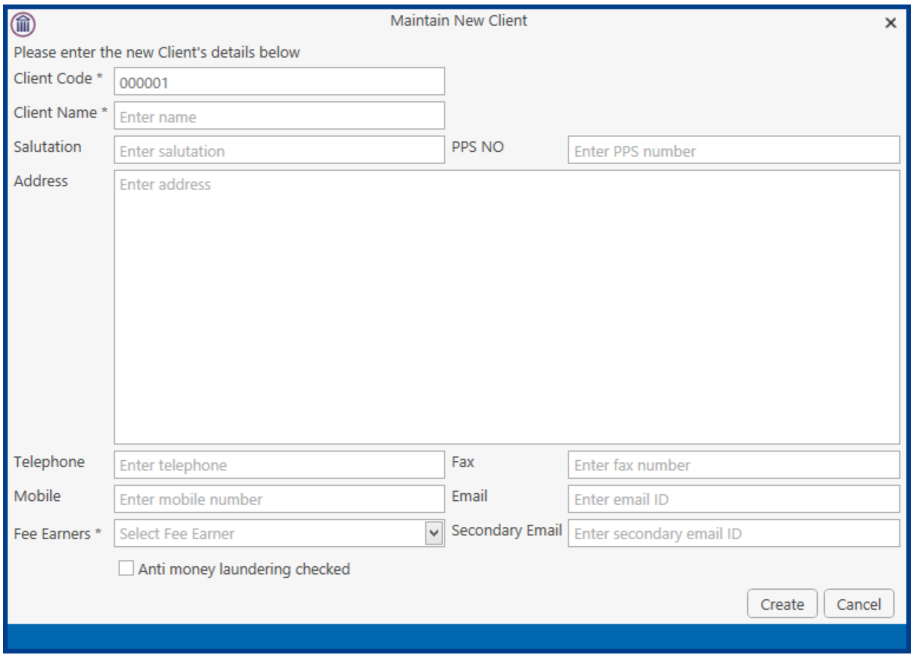
3. The following dialog box appears.



4. Click on the Browse Button to the right of Client Code and the following dialog box appears listing all clients on the system.

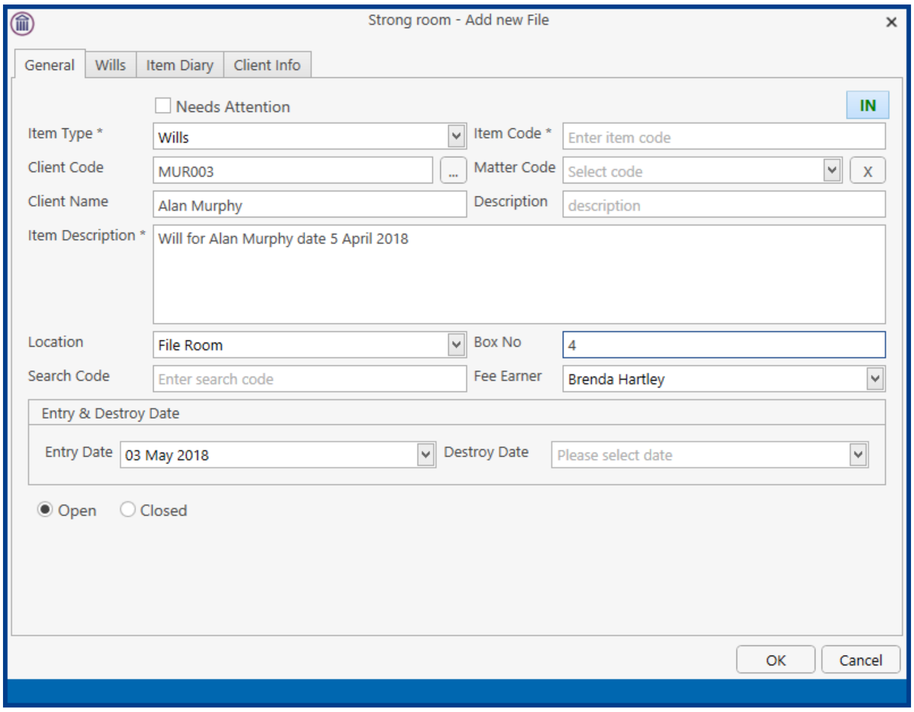


5. Search to ensure the client is not already on the system. Click the New button to add a new client.

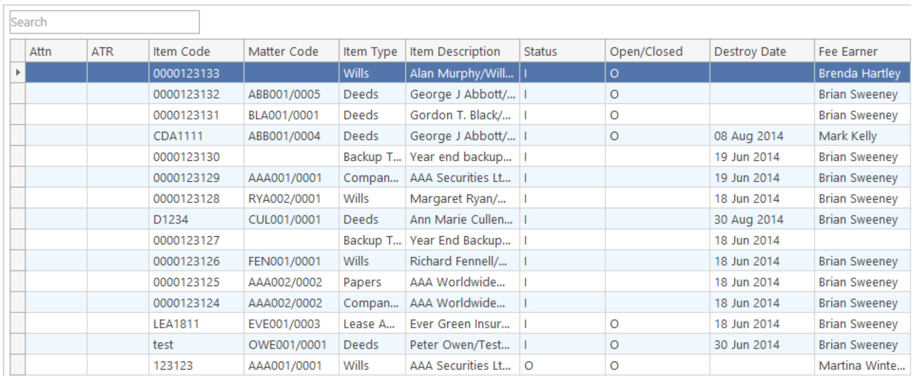


6. Add all the relevant information and click Create. This will return the user to the Strong Room screen.

7. Add the details to the entry and click OK.



8. The entry will now be visible in the Strong Room


Search

Attn	ATR	Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date	Fee Earner
		0000123133		Wills	Alan Murphy/Will...	I	O		Brenda Hartley
		0000123132	ABB001/0005	Deeds	George J Abbott/...	I	O		Brian Sweeney
		0000123131	BLA001/0001	Deeds	Gordon T. Black/...	I	O		Brian Sweeney
		CDA1111	ABB001/0004	Deeds	George J Abbott/...	I	O	08 Aug 2014	Mark Kelly
		0000123130		Backup T...	Year end backup...	I		19 Jun 2014	Brian Sweeney
		0000123129	AAA001/0001	Compan...	AAA Securities Lt...	I		19 Jun 2014	Brian Sweeney
		0000123128	RYA002/0001	Wills	Margaret Ryan/...	I		18 Jun 2014	Brian Sweeney
		D1234	CUL001/0001	Deeds	Ann Marie Cullen...	I		30 Aug 2014	Brian Sweeney
		0000123127		Backup T...	Year End Backup...	I		18 Jun 2014	
		0000123126	FEN001/0001	Wills	Richard Fennell/...	I		18 Jun 2014	Brian Sweeney
		0000123125	AAA002/0002	Papers	AAA Worldwide...	I		18 Jun 2014	Brian Sweeney
		0000123124	AAA002/0002	Compan...	AAA Worldwide...	I		18 Jun 2014	Brian Sweeney
		LEA1811	EVE001/0003	Lease A...	Ever Green Insur...	I	O	18 Jun 2014	Brian Sweeney
		test	OWE001/0001	Deeds	Peter Owen/Test...	I	O	30 Jun 2014	Brian Sweeney
		123123	AAA001/0001	Wills	AAA Securities Lt...	O	O		Martina Winte...

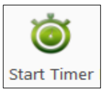
Note it is **not** possible to add a copy of the will to the record as there is no matter for the client and therefore no storage location for the document.

Chapter 12: Time Recording

Time Recording in the Case Diary

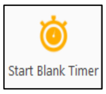
Time can be recorded in the case diary in two ways: automatically using a timer or manually using a time slip. Once time is recorded it is then posted to the Day Book and from there, it is posted to the time ledger of the case. Recorded time can be used for billing, reporting and productivity tracking.

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



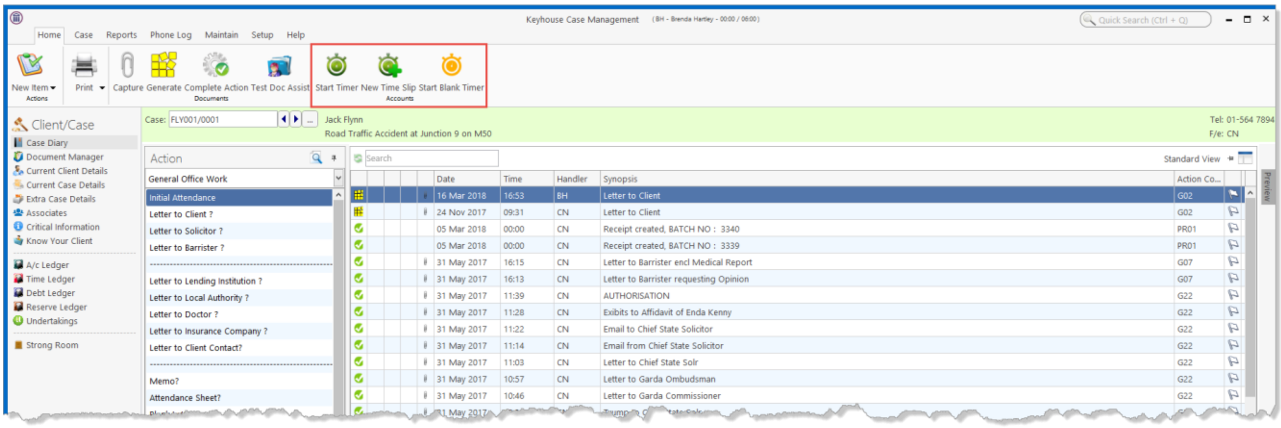
The Timer

Manual time slips



Start Blank Timer

Both tools can be found on the Home tab.



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 daybook ready for posting to the time ledger.

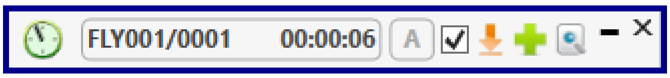
Pause Timer – Click on the clock to pause the timer. Click again to restart the timer.
Current Clock Details – Matter Code and amount of time spent.
Auto post timer – Ensures user post details before moving to a new matter.
Syncs timer with current matter – Timer will follow as user moves from matter to matter.
Show More – Gives visibility of all time recorded but not yet marked as finished.
Add Empty Timer – Creates a blank timer.

View All – Give visibility on all recorded time not yet posted. It moves the user to the Time Costing Screen.
Minimise – Minimises the timer.

Close – Stops the timer and closes the time recording. A warning will appear advising the clock will be stopped, giving the user the option to cancel.

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 **minimise** the timer on the screen, click on the minimise button -

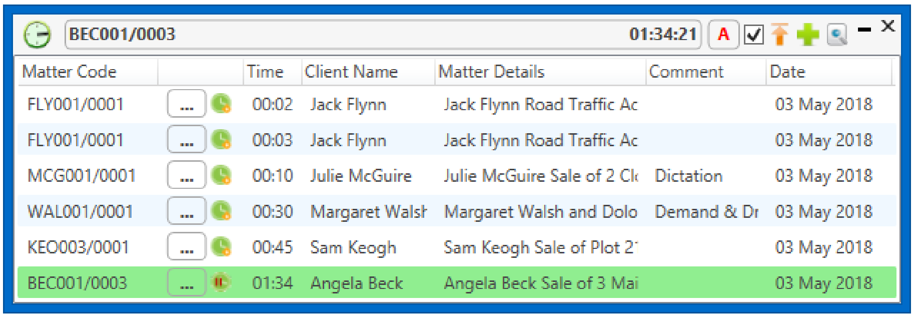
7. To move to another case in the case diary, search and open the case in the normal way. The timer will automatically pause the current time recording and create a new time recording for the new case and start the clock provided the **Keep Timer and Open File in sync** button has been ticked.

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

8. To expand the timer, click on **Maximise**.

9. To recommence a time recording for an entry already listed in your timer click on  next to case code.

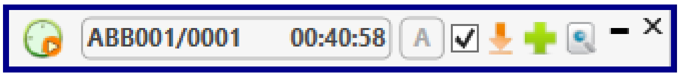
> **Note** if you open the case in the case diary, the timer will automatically recommence the active time recording for this case.
>
> **Note** the entry highlighted in **Green** is the active time recording.
>
> **Note** the **A** button will generate the time slip for the current timer before you can move to a new matter if the Auto Post Timer when selecting another Case is switched on. 



Create Multiple Timers for a Matter

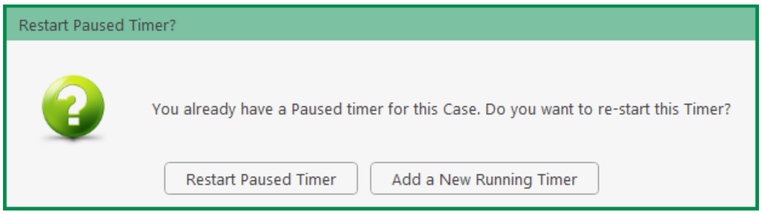
It may be necessary to have more than one timer for a matter, particularly if the Client needs a detailed description of the time spend on the case.

1. Pause the existing Timer



2. Click Start **New Timer** on the Home Ribbon

3. The following dialog box appears



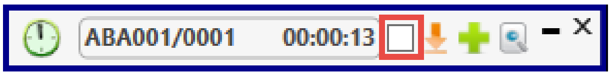
4. Click **Add a New Running Timer** to create a new timer or click **Restart Paused Timer** to revert to existing one.

5. Repeat as required.

Add Timers with Zero Minutes

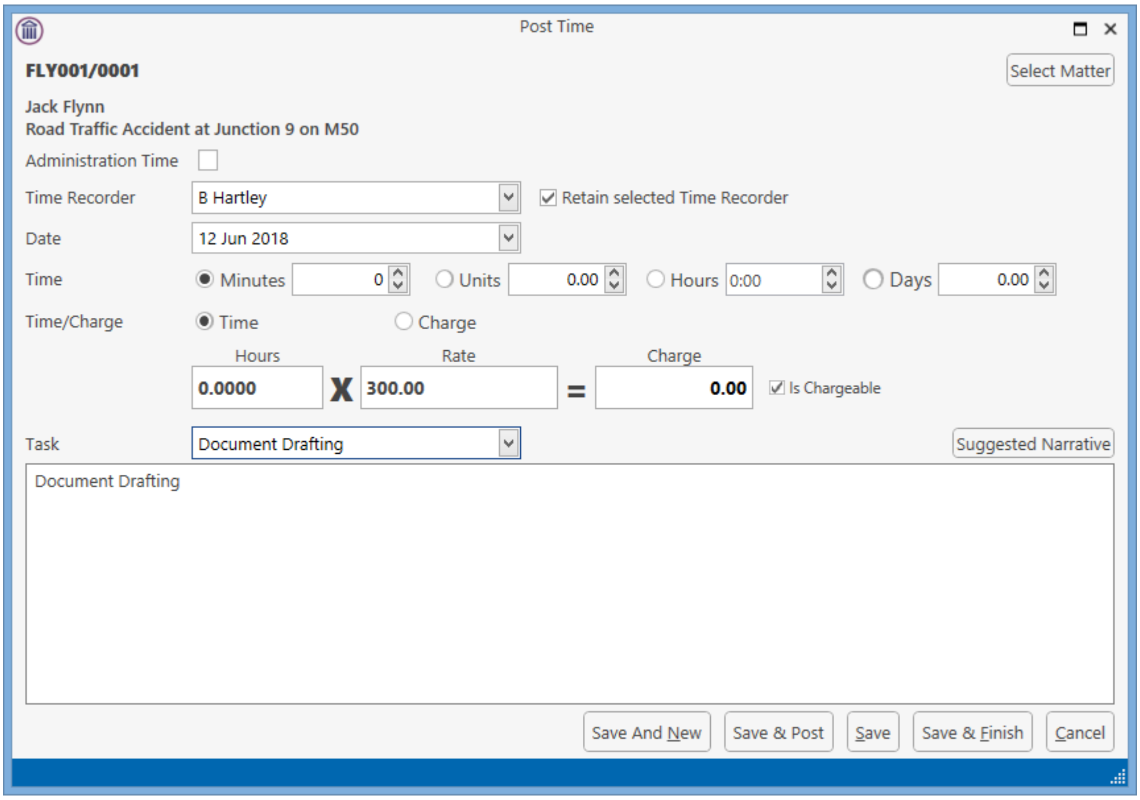
You may want to create a number of blank timers for a particular matter which will then be filled in during the course of the day. You can add the details of the work you need to complete and then activate the timer when you start to do the work.

1. Ensure the Keep Timer and Open File in sync button is unticked.



2. Open the matter to create a timer

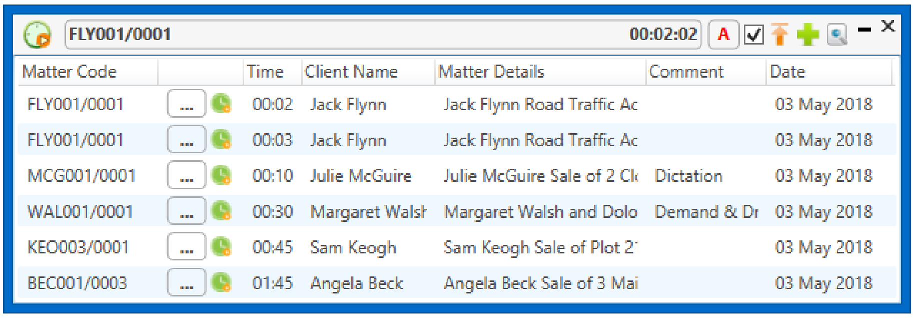
3. You can enter the task to be completed and add any additional comments if required at this stage.



4. Save the timer and repeat as needed.

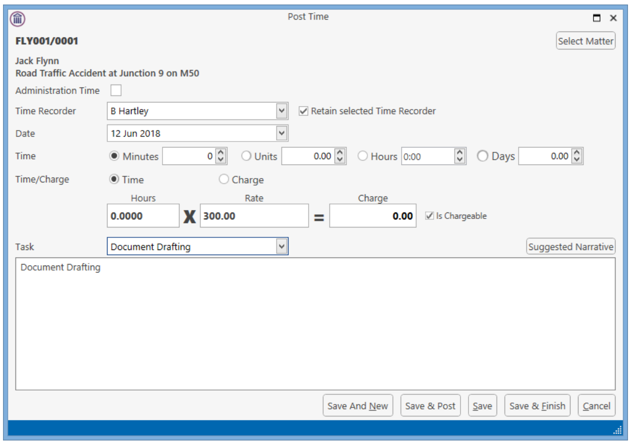
How to Post Time from the Timer

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



2. Double click an entry to add details for posting. The following screen will appear.

3. Input/Amend the following details as required: -



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

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

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

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

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

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

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

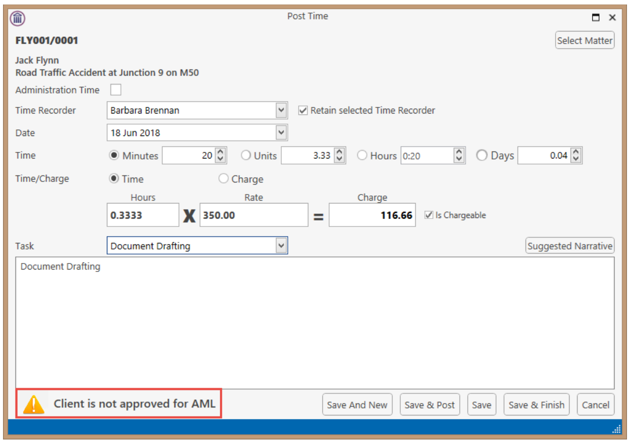
Comment: Input a narrative to describe the time entry

4. **Save** the changes.

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

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

5. If the option to prevent users from posting time if Anti Money Laundering checks haven't been completed has been turned on, a warning will be visible on the time slip.

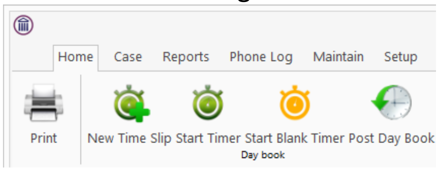


6. If the AML Check has been activated, it will prevent the system from posting the time for that matter.

How to create an Blank 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.

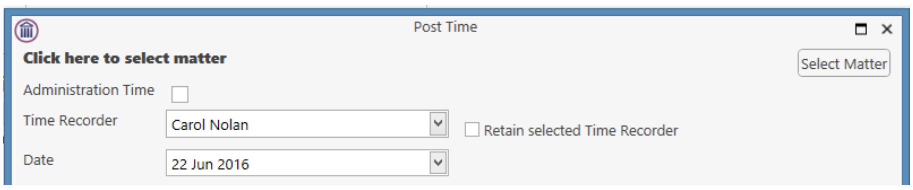
3. Click on the Start timer tool on the Home tab. The current case will automatically be selected. This may have to be deleted.

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. 

Double click the entry to add details for posting. This will bring up the Post Time dialog box (see p. 155 above), but without a matter code.



7. Input/Amend the following details as required:

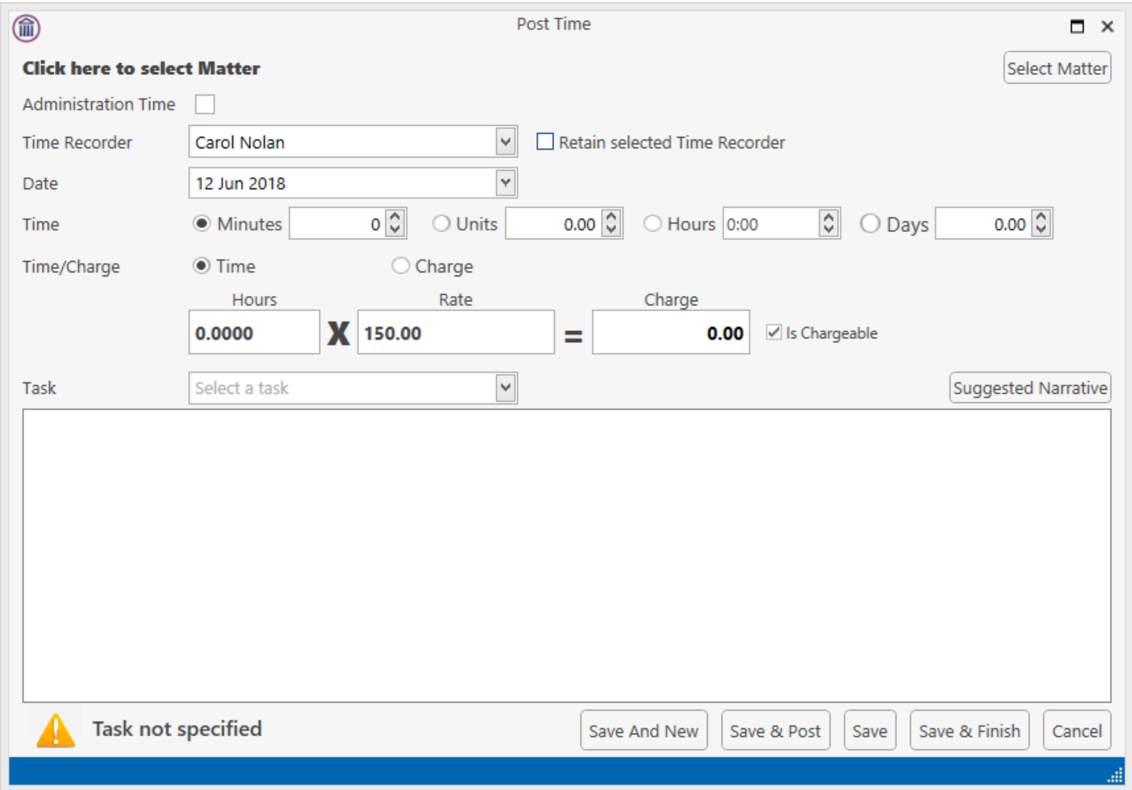
Matter:	No case code will be displayed. Click the **Select Matter** button to bring up the matter list and select the case to which the time is to be posted.
Date:	By default, the date of the time recording will be shown. Amend if required.
Minutes/Hours/Days:	This will reflect the time recorded but can be amended if required
Time/Charge:	Use the **option buttons** to select whether this entry should be charged based on time spent or as a set charge.
Hourly Rate:	The hourly rate will display the **default rate** for this handler and case.
Chargeable:	Check the box if this time is chargeable or uncheck it if it is not. By default, the box will be checked.
Task:	Use the **drop-down** arrow to select from a list of tasks.
Comment:	Input a narrative to describe the time entry

8. 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

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 to be charged by time or a set charge.
Hourly Rate:	The hourly rate will display the **default rate** for this handler and case.
Chargeable:	Using the tick box provided tick if the time is chargeable or remove if it is not. This will default to chargeable.
Task:	Click on the **drop-down arrow** to reveal a list of tasks. **Click** the task required.
Comment:	**Input** a narrative to describe the time entry

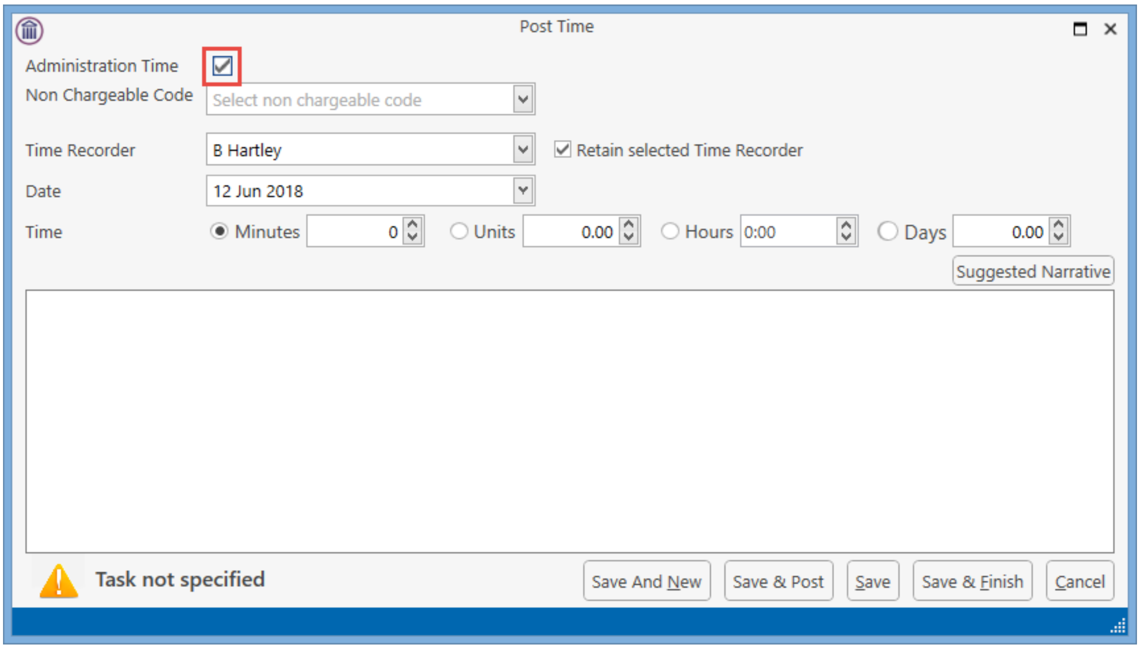
4. When all details have been entered, click Save or Save and Finish. The time slip will appear in the Daybook ready for posting.

How to create an Admin Time slip

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

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

3. Check the Administration Time box. The screen will change displaying the following option:



4. Add the following details:

Date:	Today's date will be the default; choose a different date if required.
Minutes/Hours/Days:	Input the number of hours, minutes, days etc.
Non- Chargeable Code:	Use the drop-down list to select the non-chargeable code which applies.
Comment:	**Input** a narrative to describe the time entry

5. 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.

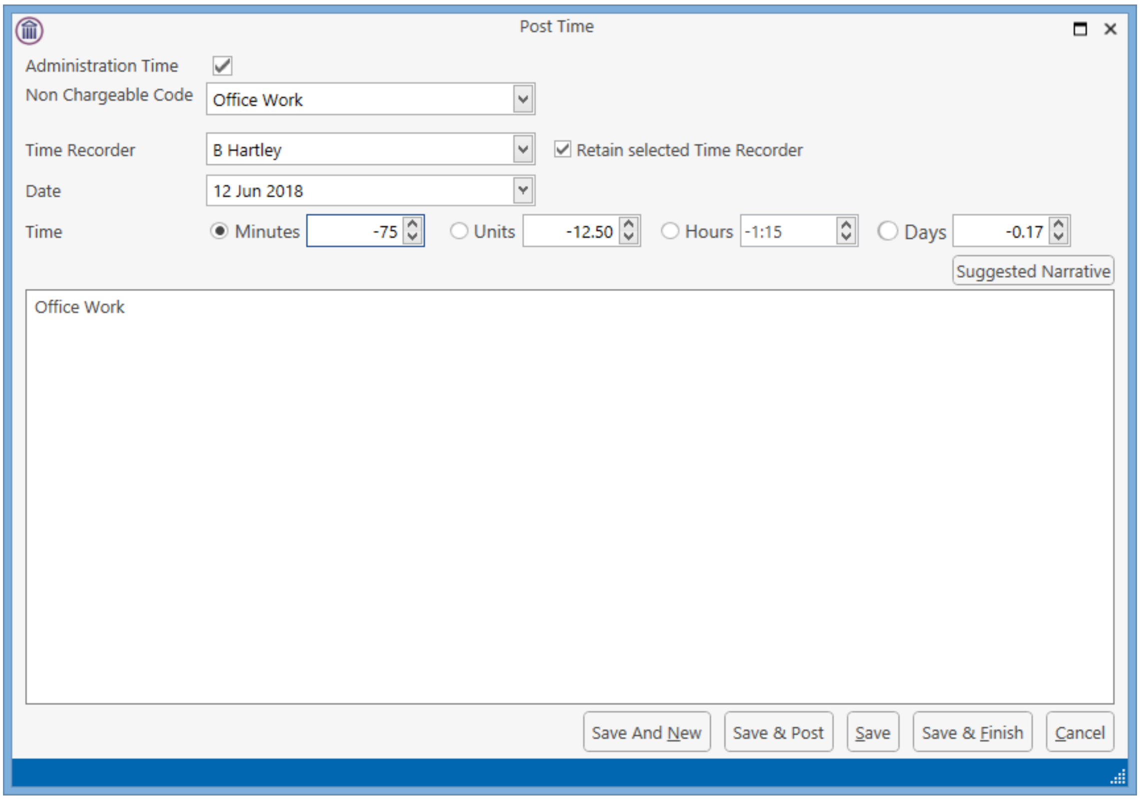
Negative Time

Once Admin time has been posted it is not possible to amend the entry. However, it is possible to add an entry with negative time.

1. Create a Manual Time Slip

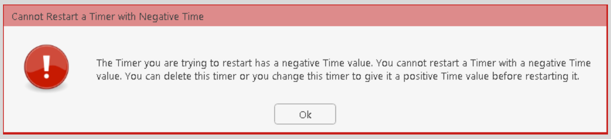
2. Enter the Non-Chargeable Code and change the Time Recorder and date if necessary.

3. Enter the time preceded by a minus sign



4. Add an additional narrative, if required and click Save.

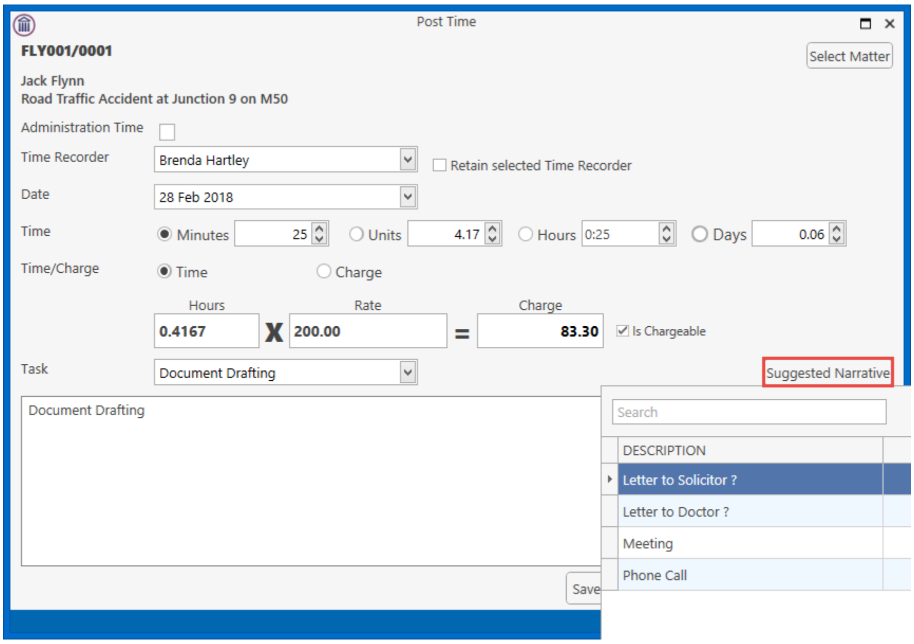
NOTE: It is not possible to restart a negative timer. The following error message will appear.



Time Recording Narratives

When posting time narrative can be used to add detail to the Comments section. The Suggested Narratives details the actions carried out on a matter over the day.

1. Open the Time Slip
2. Click Suggested Narratives



3. Double click on an item from the list to add it to the Comments section
4. Complete the time slip and save

NOTE: You may be prevented from posting time on matter where the AML has not been approved.

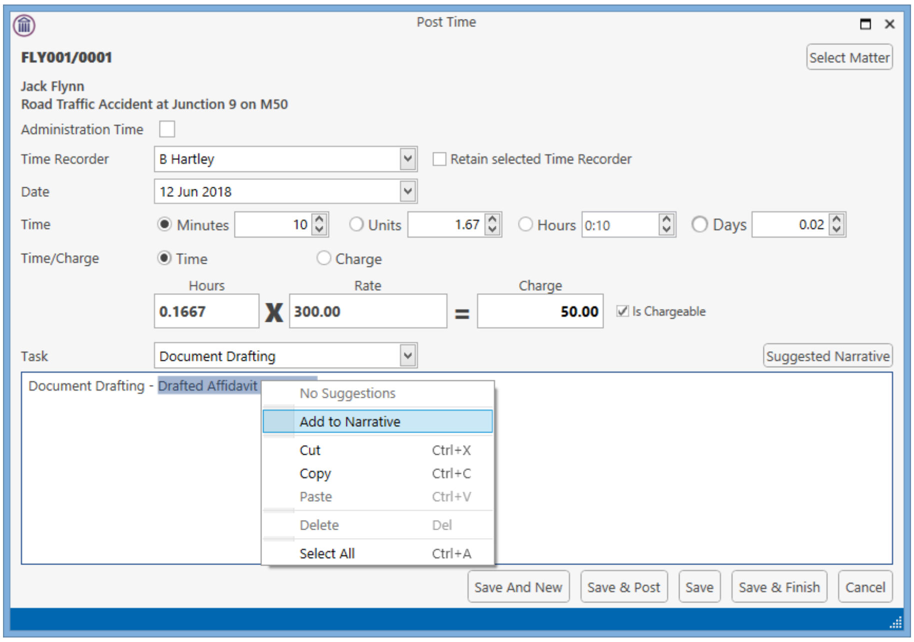
Personal Narratives

In addition to Suggested Narratives, users can add personal narratives. This will also help to add detail to the Comments section.

1. Open the Time Slip and click to the Comment Section

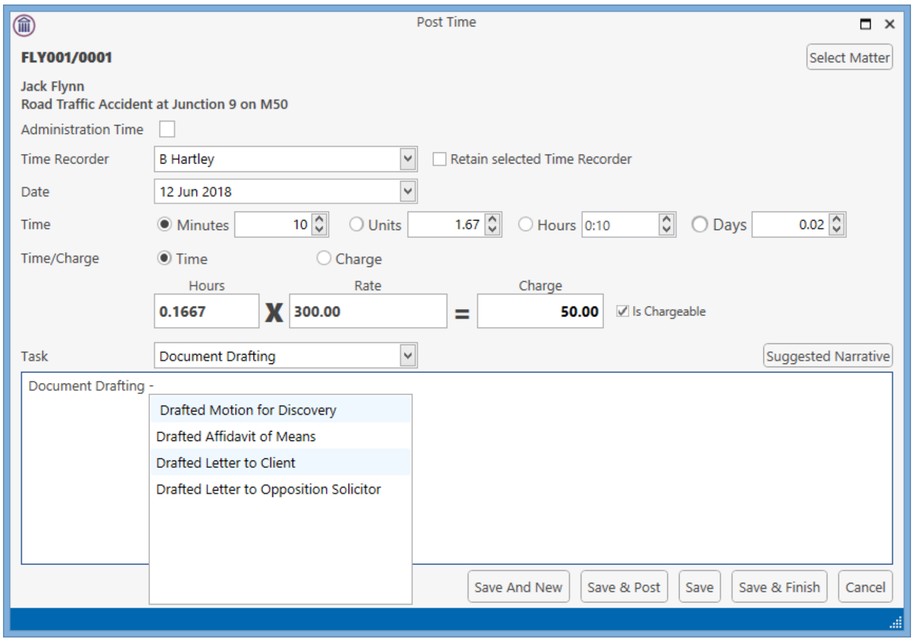
2. Enter the required comment.

3. Highlight the comment and right click to add to users narratives



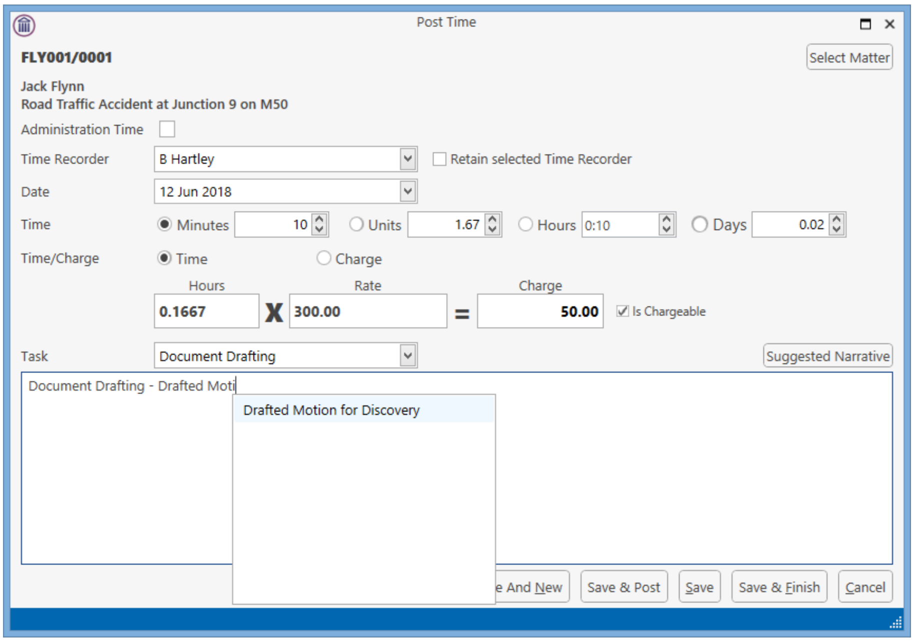
4. Continue to add as required

5. To use the narratives, double click in the comment box and select from the list by double clicking on the entry.



6. Continue until all required narratives are entered.

7. Alternatively, start typing the entry and once the list appears, select the required entry.



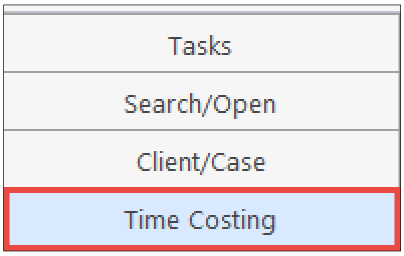
8. Repeat until all required narratives are entered

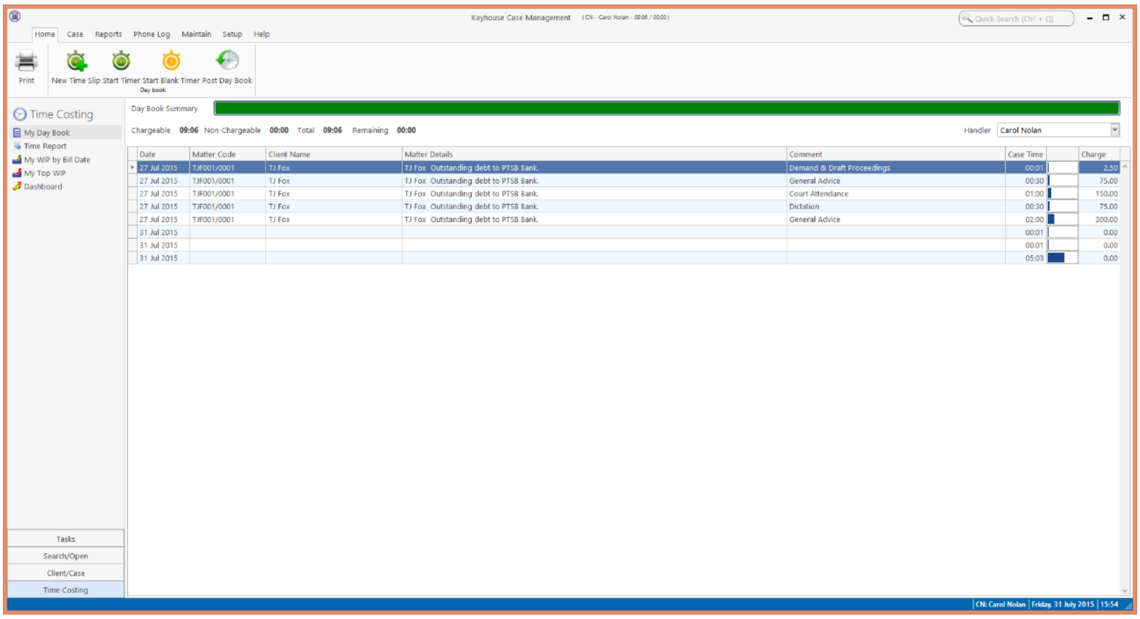
How to View the Day Book

1. From the **Timer** click on **View All** on the timer tool bar. 

2. Alternatively click the Time Costing option from the navigation buttons

3. The Day book will appear.





My Day Book

Viewing the Day Book

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

2. Click on the required item.

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

How create a Time slip in the Day Book

1. Click on **New Time Slip** on Home Tab in **My Day Book**. The familiar Post Time dialog box (see How to create an Admin Time Slip Pg. 156).
 will appear.

2. Provide details such as the matter, date, time, task etc. For further information, see the section on see How to create an Admin Time Slip Pg. 156 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 dialog box will appear.

2. Check the Administration Time box. The screen will change to display the options for Administration time (see How to create an Admin Time Slip Pg. 156 above).
3. Complete the details of Date, Time, Non-Chargeable Code and Comment as above, How to create an Admin Time slip, (p. 156).

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 dialog 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**.

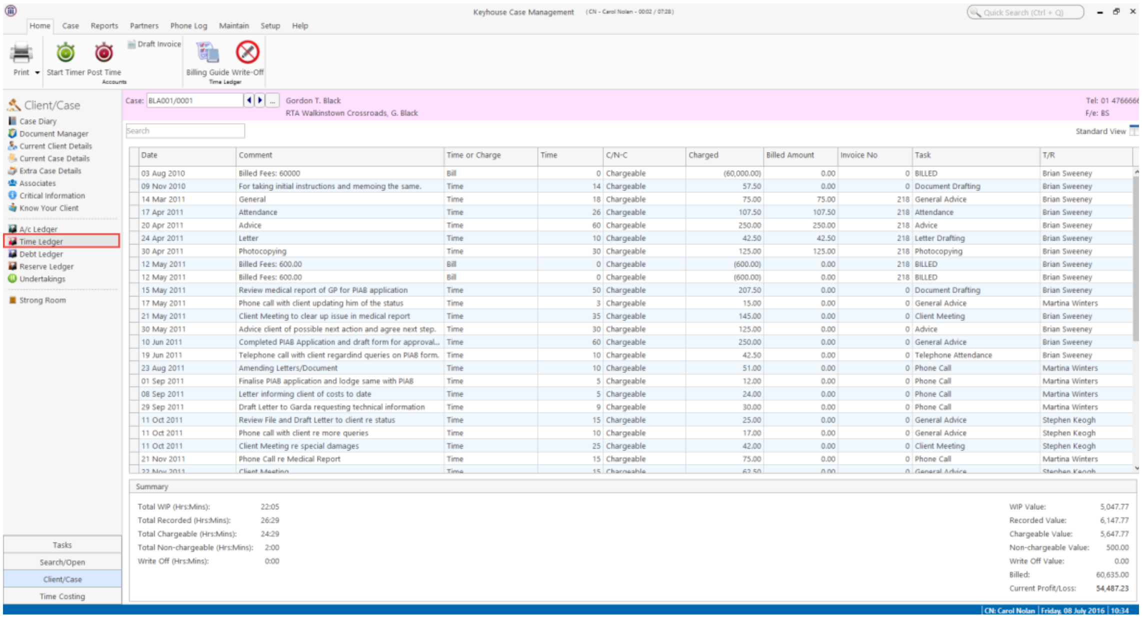
How to Post the Day Book

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.



Tip: Click on a column heading 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.

Tip: you can add the Running Balance and WIP Running Balance to the Account Ledger Grid. For details on how to do this see Pg **Error! Bookmark not defined.** for information on creating a new view.

How to Create a Draft Invoice from the Time Ledger Screen

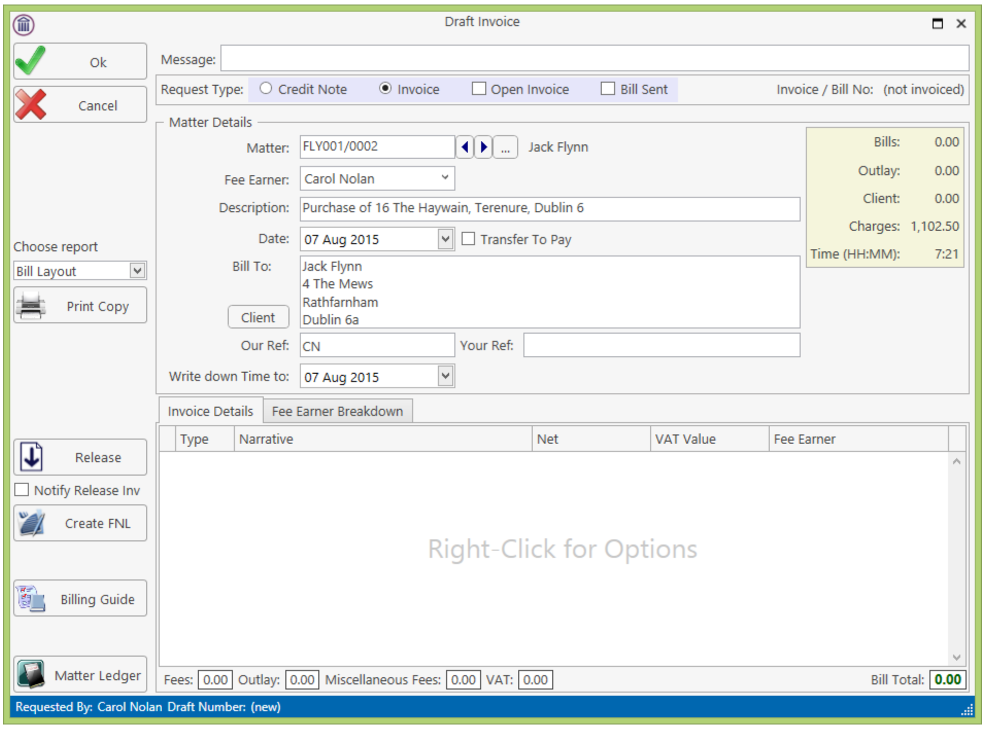
A Draft Invoice can be created from several Locations – The Home Tab on Time Ledger or the Accounts Ledger and the New Item list on the Case Diary or the Document Manager.

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

2. Click on **Time Ledger** on the **Case Diary** Navigation panel to view outstanding time.

3. Click on **Draft Invoice** on the Home tab. The following Draft Invoice will appear.

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



Message: **Input** a message for the account department (optional)

Type: **Invoice** will be checked by default. Select **Credit Note** if required.

Open Invoice: To create an open invoice, check the **Open Invoice** box.

Bill Sent: Check when the bill is actually sent.

Matter: This will show the current case by default; to change, click on the browse button to bring up the matter list and select a different case.

Description: This will default to the matter description of the current case but may be amended.

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

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

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

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

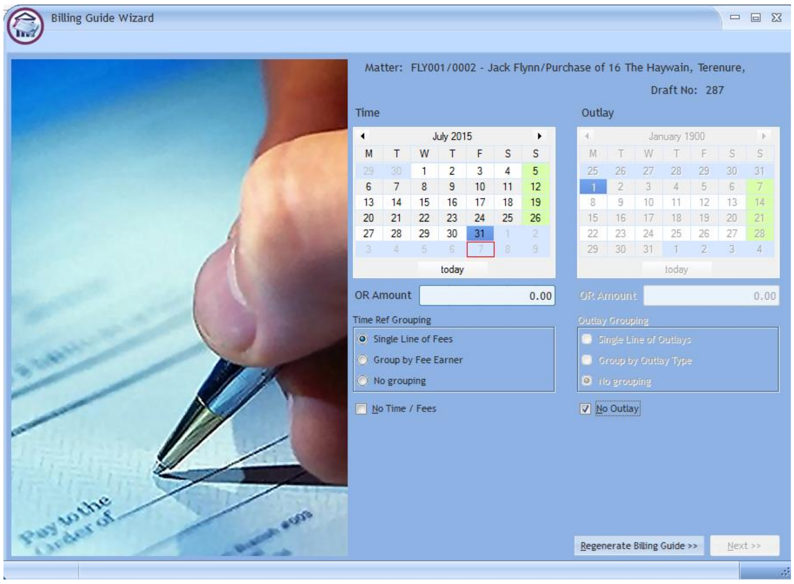
Your Ref: **Input** a reference if applicable.

Write down time to: Today’s date will be shown by default. You may choose a different date.

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

   a. Using the **Bill Guide Wizard**

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



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

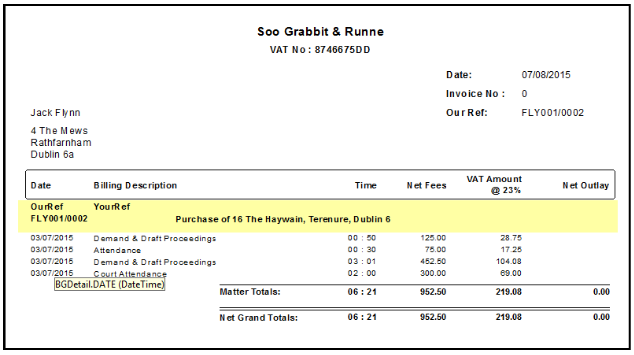
The options for grouping time are:

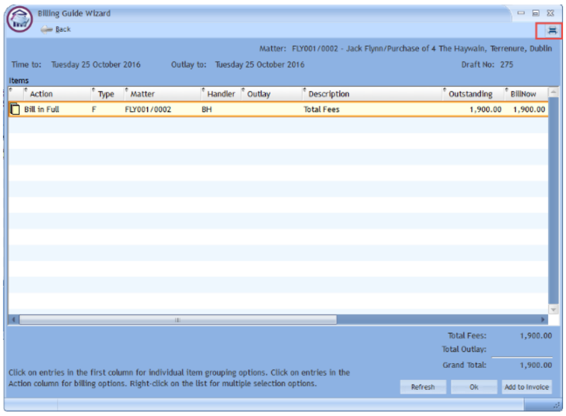
- Single line of fees — the fee earners will not be listed individually.
- Group by Fee earner — the total for each fee earner will be listed on its own line.
- No grouping — each item will be listed as recorded.

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

The options for grouping outlay are similar:

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



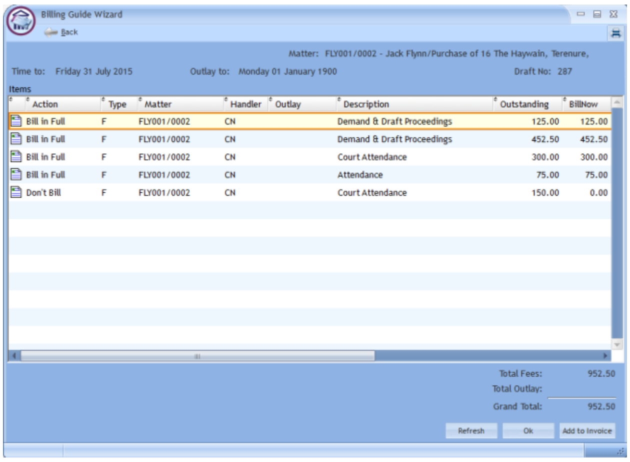


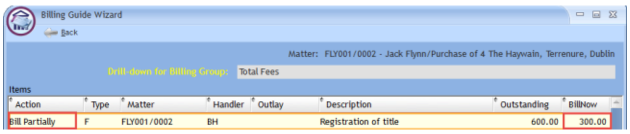
- Group by Outlay Type — the outlay can be grouped to show the total for each type of outlay, such as medical reports and stamp duty, if each item of expenditure has been allocated to a type.

- No Grouping — each item of outlay will be listed in the order in which it was entered.

ii) Click Regenerate Billing Guide to continue to the next screen.

This example shows no Grouping on either fees or outlays





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

How to Partially Bill an Item

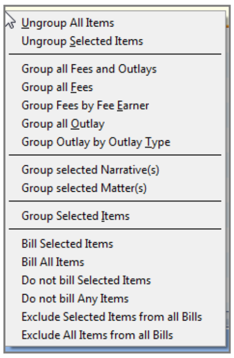
- Double-click the item to be changed:
- Click the figure in the ***Bill Now*** column and change the amount. The ***Action*** will change to ***Partially Billed***.
- Click **OK** to save the change.

How to exclude an action item from a bill

- Click the item to be excluded.

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

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

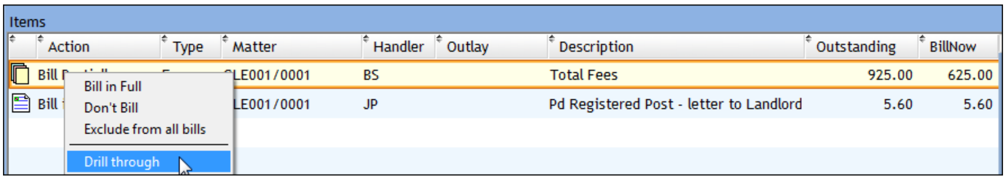


To Add Grouping Levels

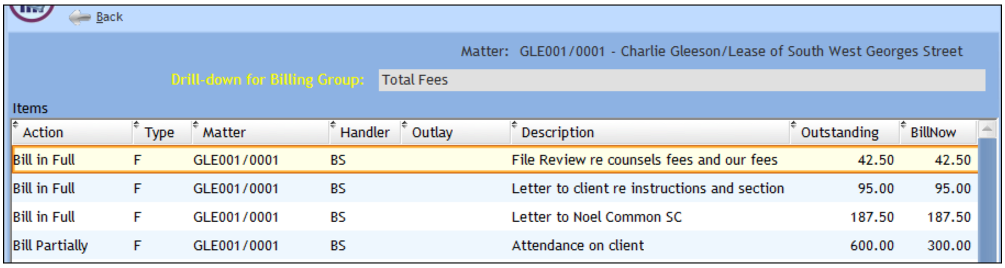
Right click on an item and select the required Grouping option from the pop-up menu

How to Drill down to view all items in a group

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



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



- Click the **Back** button to return to the previous screen.

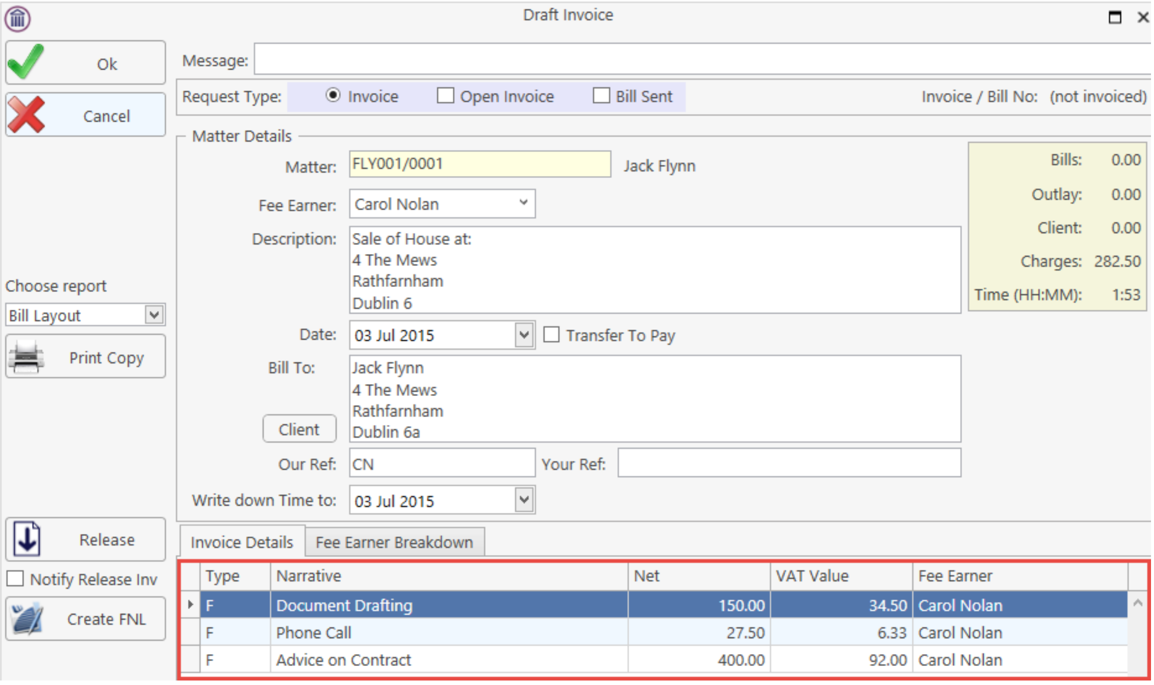
iv) When complete:

- Click **OK** to update the draft. A message will ask whether you want to recalculate the ***Fee Earner Breakdown*** based on the changes to the Billing Guide. Click **Yes** to recalculate or **No** if you do not wish to recalculate.

OR

- Click the **Add to Invoice** button when you are ready to update the invoice. A message will ask whether you want to recalculate the ***Fee Earner Breakdown*** based on the changes to the Billing Guide. Click **Yes** to recalculate or **No** if you do not wish to recalculate.

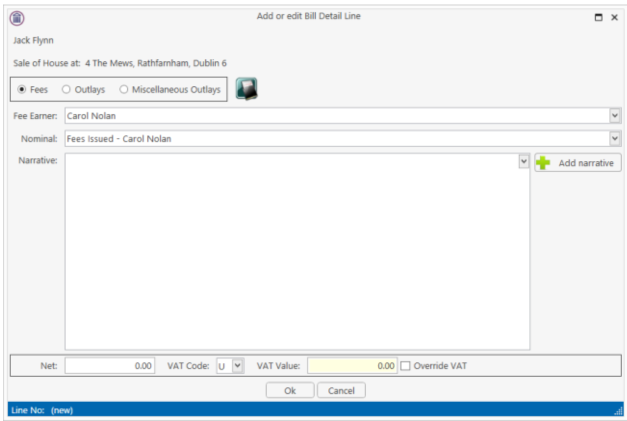
b. Adding a Line to the bill manually



i) Right-click in the ***Invoice Details*** screen to see the pop-up menu.

ii) Select **Add a Bill Detail Line**.

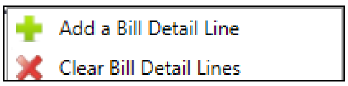
iii) On the ***Add or edit Bill Detail Line*** screen, input a narrative and amount and change the default information as necessary. Outlay will, by default, be allocated to the Matter Fee Earner.



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

c. How to amend the Fee Earner Breakdown

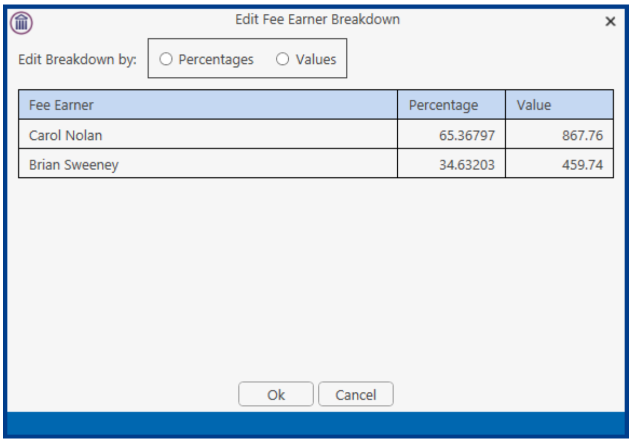
i) **Click** the **Fee Earner Breakdown** Tab.



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

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

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



iv) Alternatively, you may right-click on any of the fee earners and select the required command from the pop-up menu.

v) If you select **Add Fee Earner**, you will be able to choose from a list of fee earners by double-clicking.

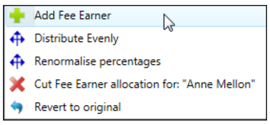
vi) If you select **Cut Fee Earner allocation for [Fee Earner Name]**, that fee earner's allocation will be removed from the breakdown

vii) In either case, you will be returned to the ***Edit Fee Earner Breakdown*** screen, where you can alter the percentages or values as described in iii) above.

viii) Click **OK** to save the changes and be returned to the ***Draft Invoice*** screen.

5. Click **OK** on the left-hand column of the ***Draft Invoice*** screen to save the draft bill or **Release** to send to accounts for approval.

6. The Draft Bill will appear as an entry in the Case Diary for future review.

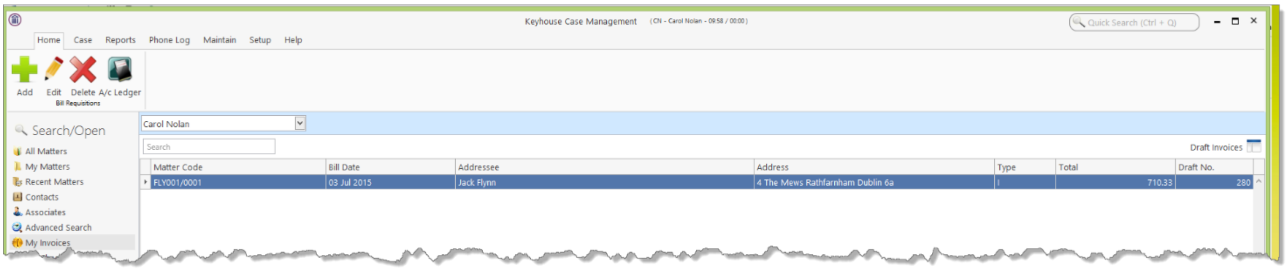


15 Nov 2014	14:03	CN	Draft Bill Draft Bill No: 268

7. To view the draft invoice, double-click the entry and amend as required. Then click **Release** as in 5 above to send to accounts for approval.

8. Once the invoice has been released by Accounts the Draft Invoice will disappear from the Case Diary and be replaced by the Invoice.

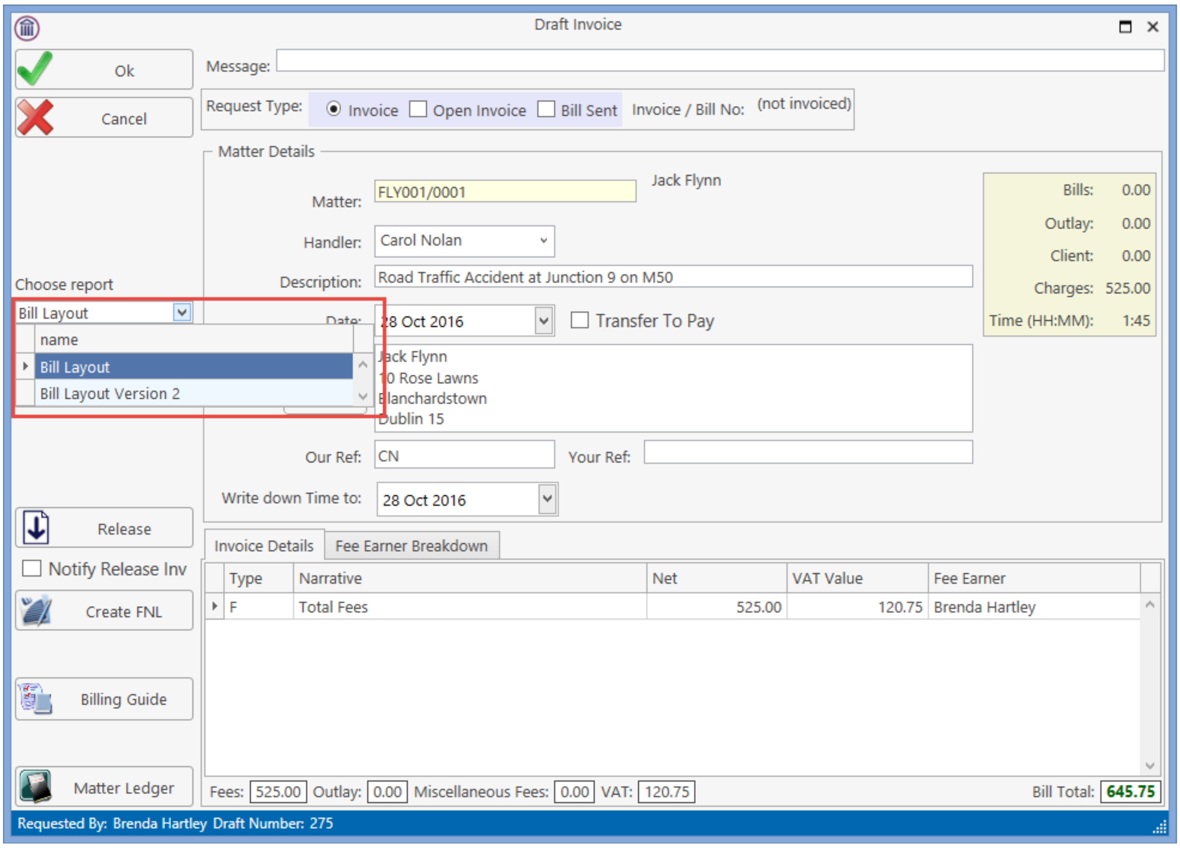
9. All draft invoices can be seen in in My Invoices on the Search/Open screen



Change the Billing Layout

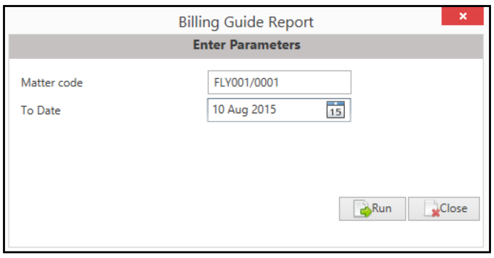
1. Create the Invoice as normal

2. Click on the drop-down arrow to the right of Billing Layout



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

Create a Billing Guide Report



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

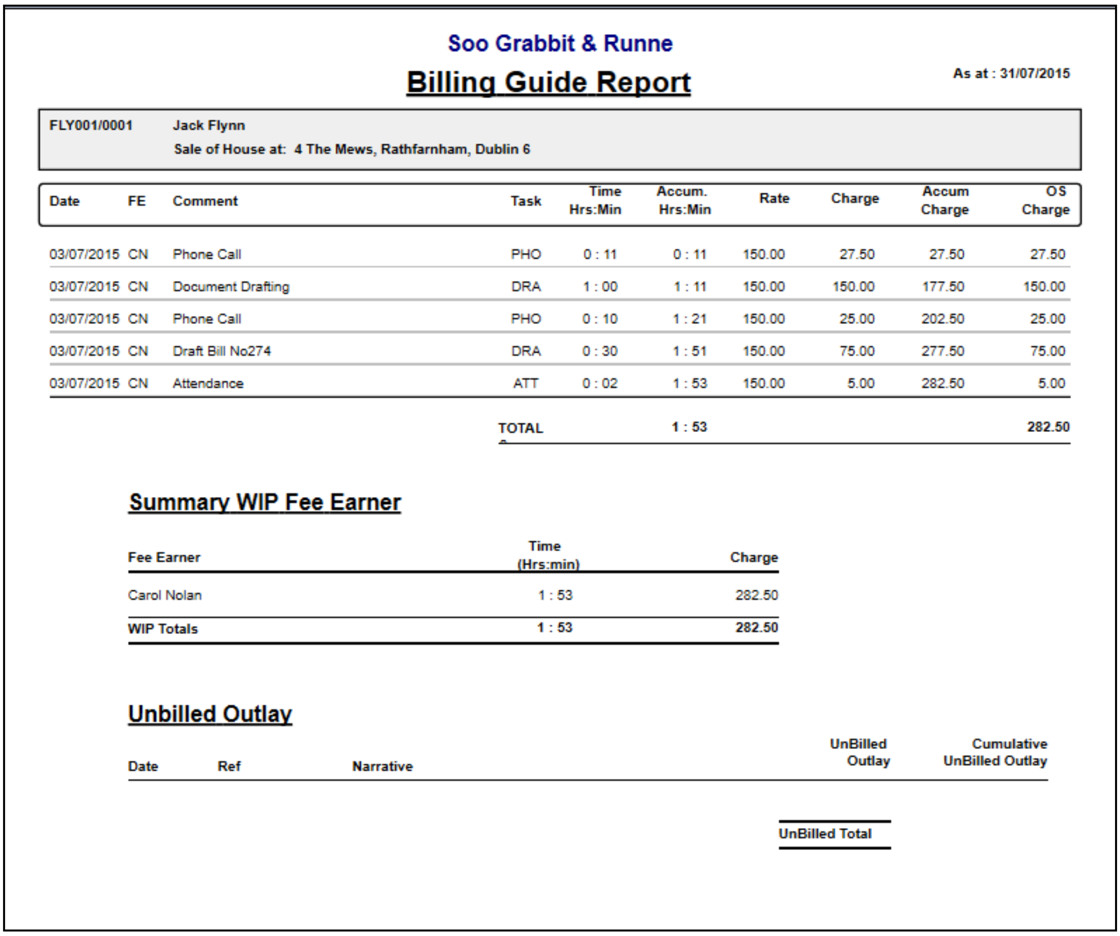
2. Click on **Time Ledger** on the **Case Diary** Navigation panel.

3. Select **Billing Guide** on the Home tab to bring up a screen asking for parameters for the Billing Guide report.

a. Specify the date down to which the report is to be prepared

b. Enter the matter code. The current case will be shown by default

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



Soo Grabbit & Runne

Billing Guide Report

As at : 31/07/2015

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

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

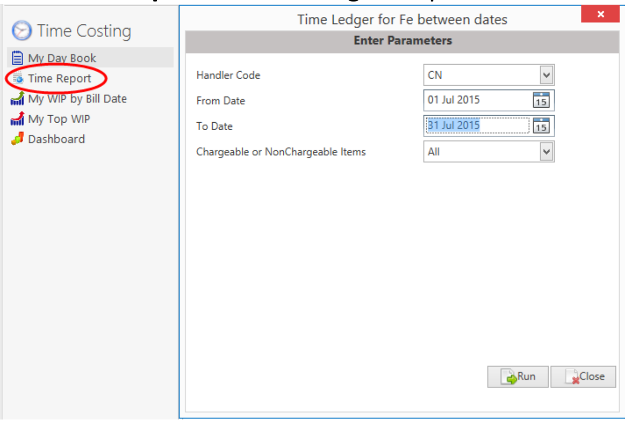
UnBilled Total

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.

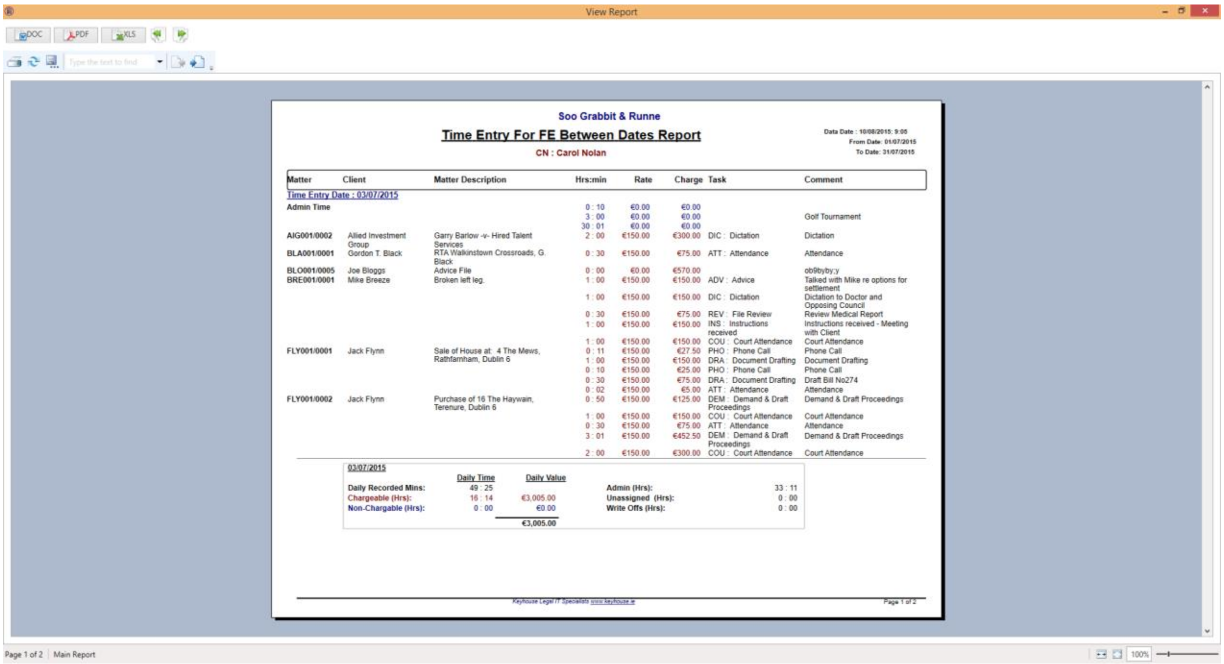
The Time Report

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



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

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



My WIP by Bill Date

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

   WIP is Work in Progress i.e. unbilled time

Soo Grabbit & Runne

WIP for Fee Earner by Last Bill Date

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

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

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

	Started	Last Bill Date	Matter	Client Name	Description	Client A/C	WIP
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

   Billing Guide report.

View Report

DOC PDF XLS

Type the text to find

Soo Grabbit & Runne

WIP for Fee Earner by Last Bill Date

Data Date : 12/11/2014:21:14

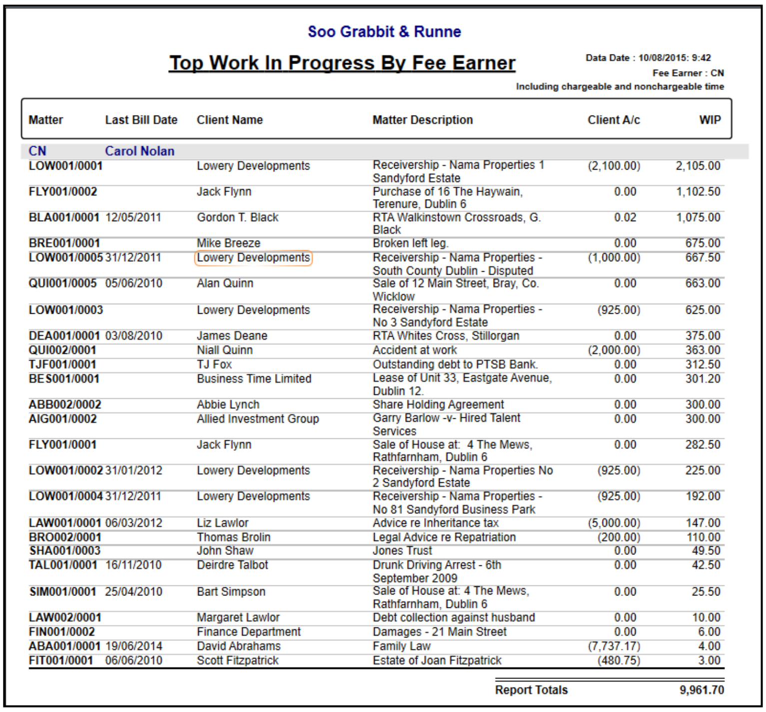
	Started	Last Bill Date	Matter	Client Name	Description	Client A/C	WIP
CN		**Carol Nolan**					
	08/05/2004		**ABB001/0001**	George J Abbott	Sale 45 Somserset Road, Dublin 6	(345,000.00)	437.50
	31/01/2012		**ABB002/0002**	Abbey & Procter	Share Holding Agreement	0.00	300.00
	02/12/2005		**BES001/0001**	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

Page 1 of 1 | Main Report | 100%

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	(1,000.00)	667.50
QUI001/0005	05/06/2010	Alan Quinn	Sale of 12 Main Street, Bray, Co. Wicklow	0.00	663.00
LOW001/0003		Lowery Developments	Receivership - Nama Properties - No 3 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

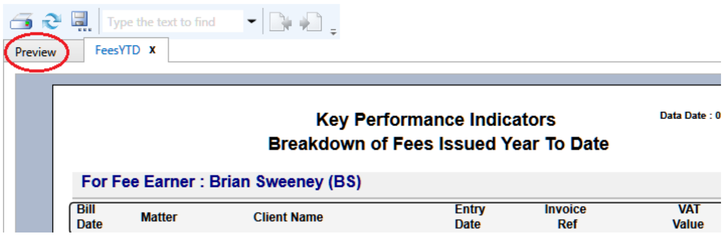
2. The same options are available for printing, export and searching as in the case of the ***Time Report*** and ***Billing Guide*** report.

KPI Reports

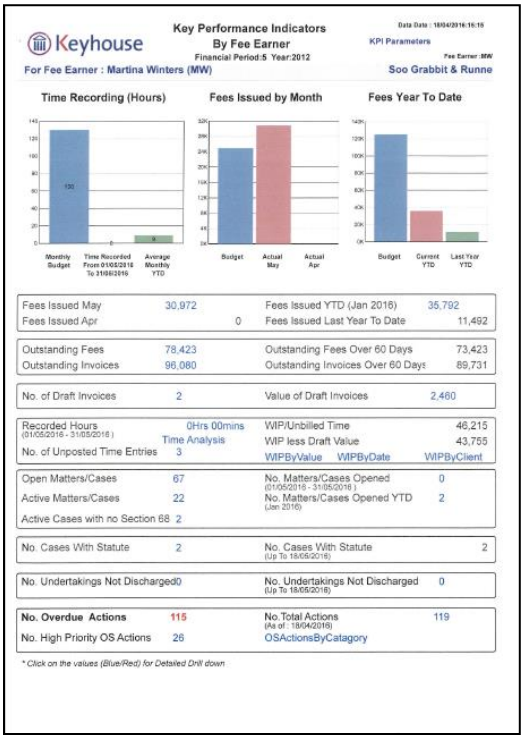
1. Click **Dashboard** on the Navigation panel in ***Time Costing*** to see the Key Performance Indicators report for the fee earner who is logged in.

2. Click on the figures in **blue** or **red** to view a sub-report containing a breakdown of the details that make up that figure.

3. In the sub-report, click the **Preview** tab to return to the main KPI report.



4. The options to ***Export***, ***Print*** and ***Search*** the KPI Report are the same as those for the other reports described above.



Mark Time as Billed/Unbilled

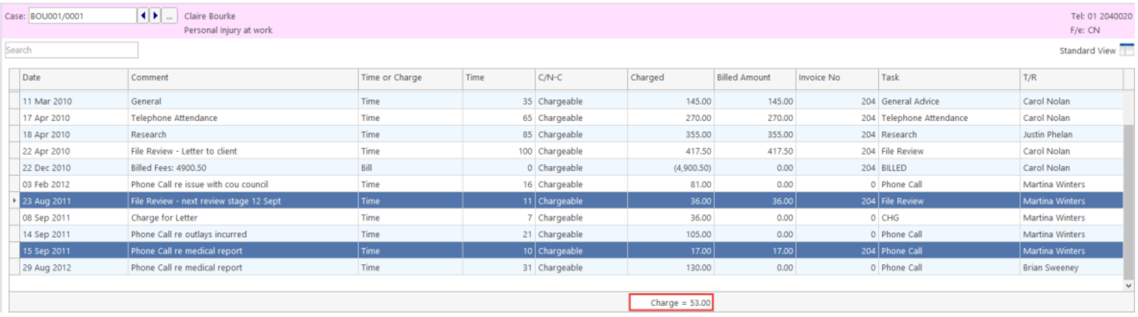
Time can be marked as billed on a matter. This will prevent it from appearing on future Billing Guides and invoices. This can be done in one of two ways – individual lines can be written off, or all time for the client can be written off. The ability to mark time as billed can be restricted. Please see the System Administrator if the option is not available.

> **NOTE**: If these options have been used in error and Keyhouse is requested to restore the data, a charge will be incurred.

Method 1 – Write off Specific Time Entries

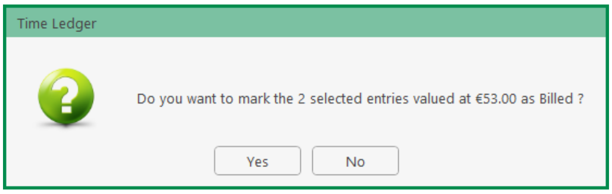
1. Open the Time Ledger for the matter.

2. Select the line or lines to be written off. Where there are multiple lines, use the <CTRL> Key to help highlight the lines. As the user is selecting line, a total is accruing at the end of the list of entries.

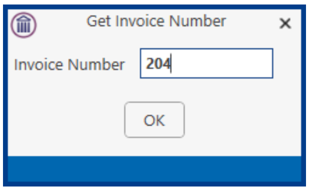


3. Right click in the highlighted area and select Mark as Billed from the list.

4. The following dialog box will appear detailing the total to be written off.



5. Click Yes and the following dialog box appears.



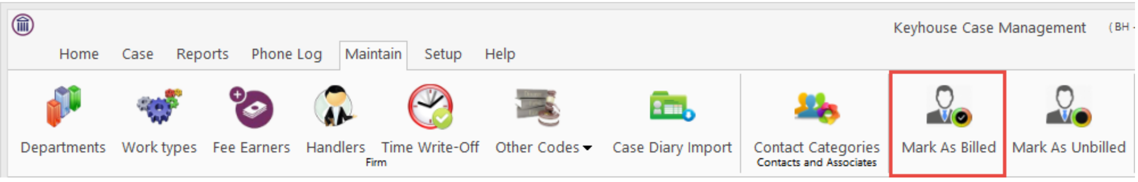
6. Enter the invoice number that the time will be written off to and click OK.

7. The Time Entries will be marked as billed in the Time Ledger.

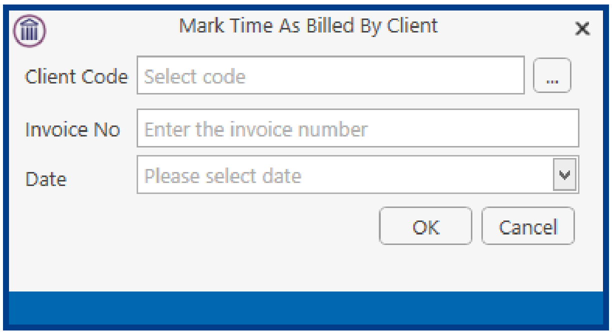
Method 2 – All Unbilled Time

All unbilled time recorded for the client will be marked as billed up to the specified date.

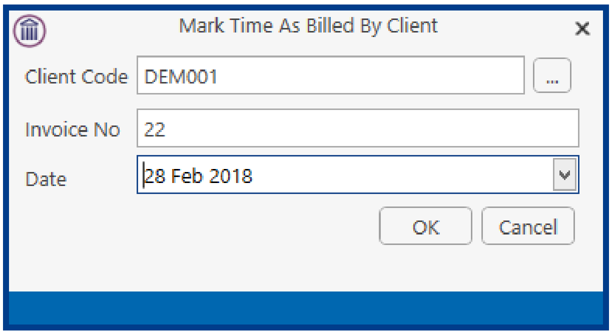
1. Click to the Maintain Ribbon (Access to this ribbon may be restricted by the System Administrator).



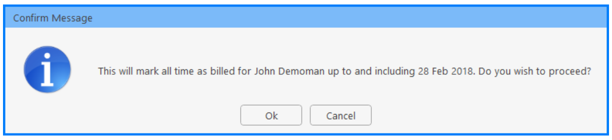
2. The following dialog box appears



3. Select the client, enter the invoice number the time is to be written off to and the date the time is to be written off to.



4. Click OK and the following dialog box will appear.



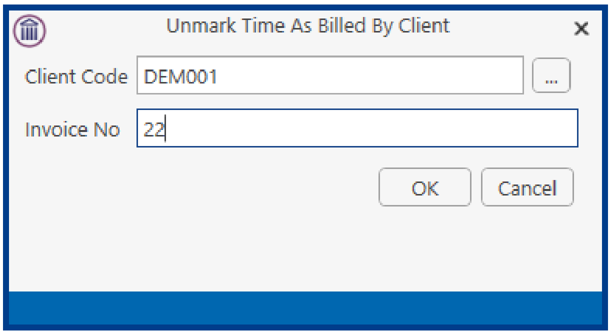
5. Click OK to complete the write off. All unbilled time is now marked as billed for the client.

Mark Time as Unbilled

If time has been marked as billed in error, it can be unbilled. This can only be done on the Maintain Ribbon and as such ***all*** time associated with the Invoice will be marked as unbilled. If using Composite Billing, all time, regardless of the matter, will be marked as unbilled.

1. Go to the Maintain Ribbon and click the Mark as Unbilled button

2. Complete the dialog box, detailing the client and the invoice number



3. Click OK. All time associated with the invoice is now unbilled.

Chapter 13: Accounts

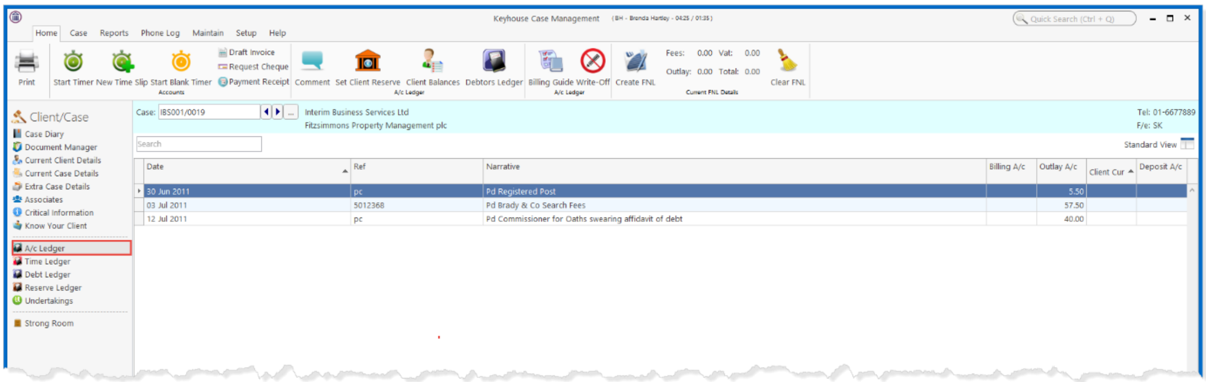
Account Functions in the Case Diary

View the Matter Ledger

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

2. Click on **A/C Ledger** on the Case Diary Navigation panel.

3. The following screen will appear.



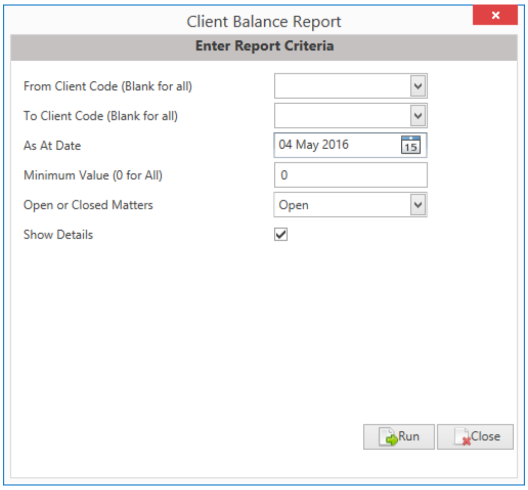
NOTE: For further information on the matter ledger see the SAM Accounts Manual.

Run a Report on client balances

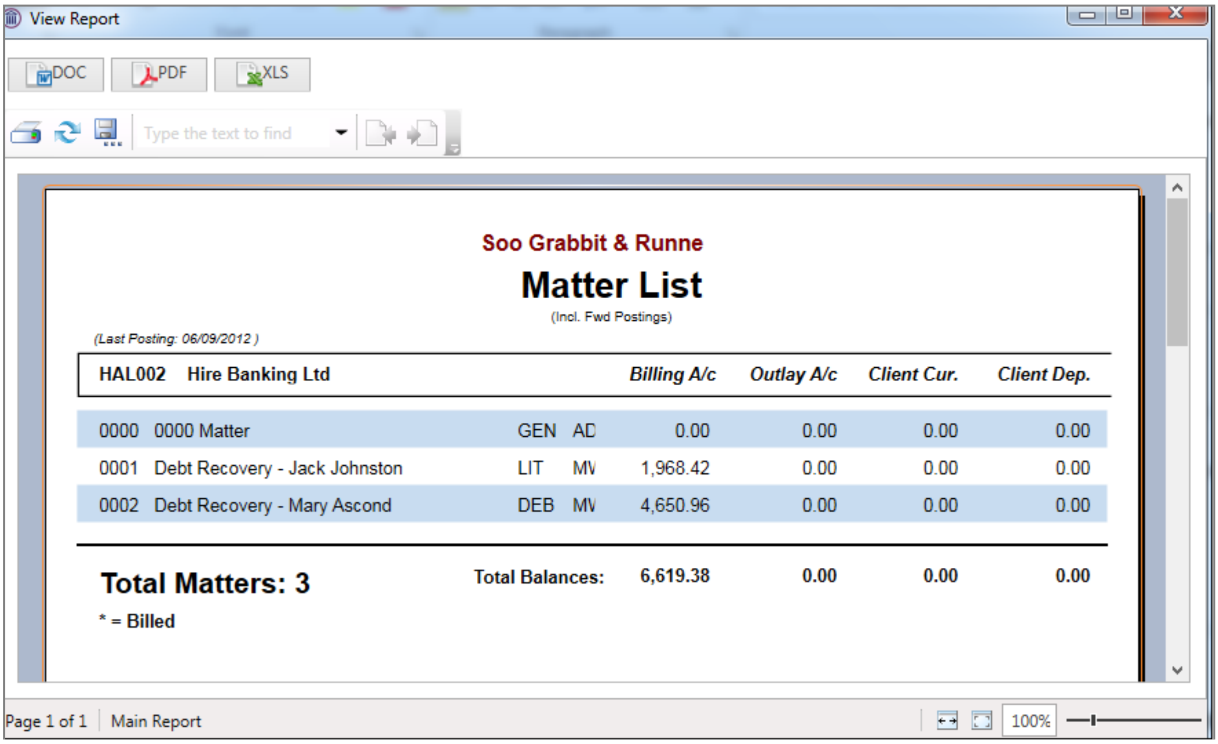
1. **Open** a case in the Case Diary.

2. Click on **A/C Ledger** on the Case Diary Navigation panel.
3. Click on the **client balances** icon on the Home tab of the Ribbon. The following screen will appear.

4. It will default to the current client; select a different client from the drop-down list, if required.



5. A report will appear listing all matter balances for this client.

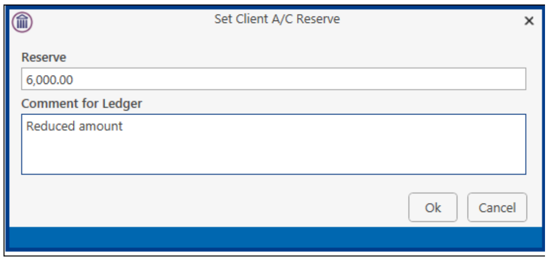


How to set a reserve amount

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.

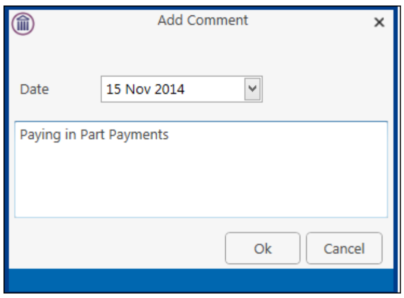


4. **Input** an amount and a comment.

5. Click **OK**; the reserve amount will then appear on the matter ledger.

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.

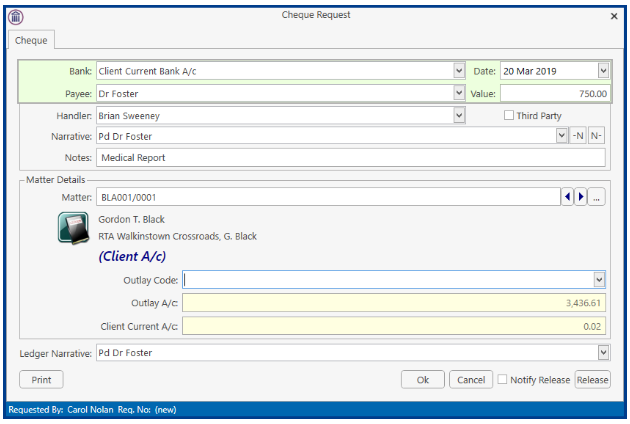
How to Create a Cheque Request

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. Additional narrative information can be added using the –N and N- buttons.

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.

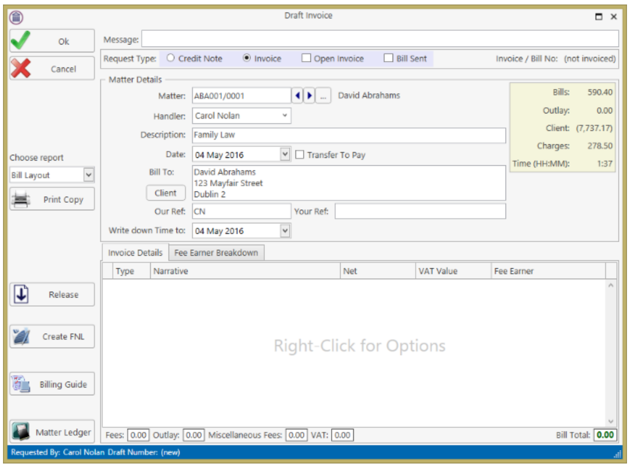
> **Note**: See Chapter 12 for particulars on how to use the Billing Guide wizard, manually adding time and outlay to a bill.

How to Create a Draft Invoice

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

2. Click on **A/c Ledger** on the **Case Diary** Navigation panel.

3. Click on **Draft Invoice** on the Home tab while in **A/c Ledger**. A Draft Invoice screen will appear.



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

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

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

Open Invoice: Check the box to create an open invoice.

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

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

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

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

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

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

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

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

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

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

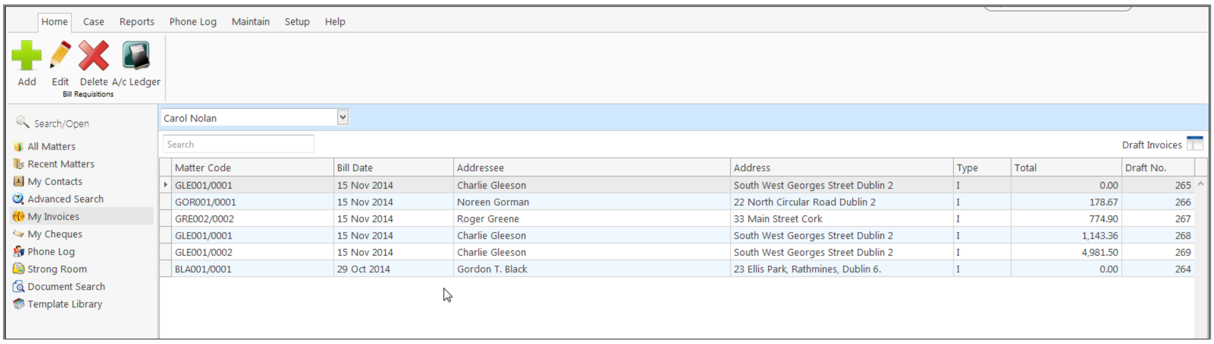
   See Chapter 12 (pg 149) above for particulars of how to use the Billing Guide wizard, manually adding time and outlay to a bill.

My Draft Invoices

How to View My Invoices

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

2. Select **My Invoices** on the Navigation panel to display a list of your draft invoices.



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 on pg. 180.

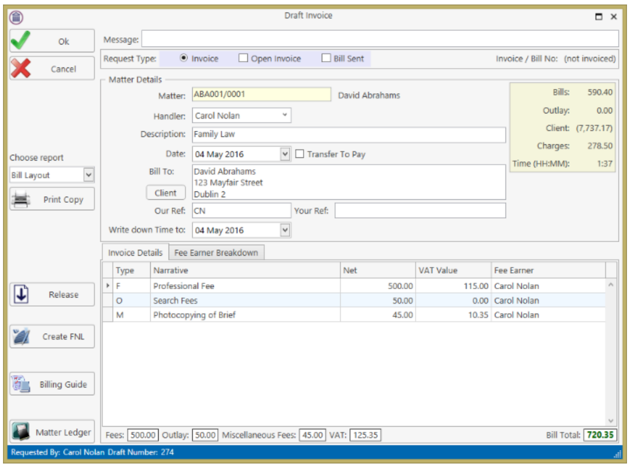
How to Edit a Draft Invoice

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.

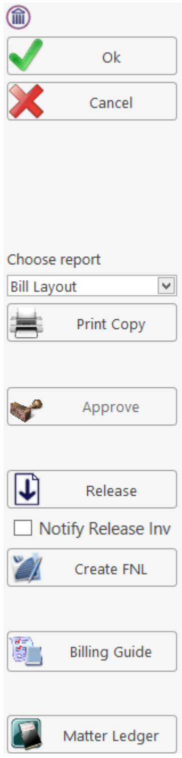
3. **Edit** the invoice as required.

4. Click **OK** to save the changes or click **Release** to save the change and send to Accounts for approval.



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 Approve a Draft Bill

1. Open the Draft Bill

2. Click the Approve Button

3. The Invoice will not appear on the Accounts Ledger until it has been posted by the Accounts Department.

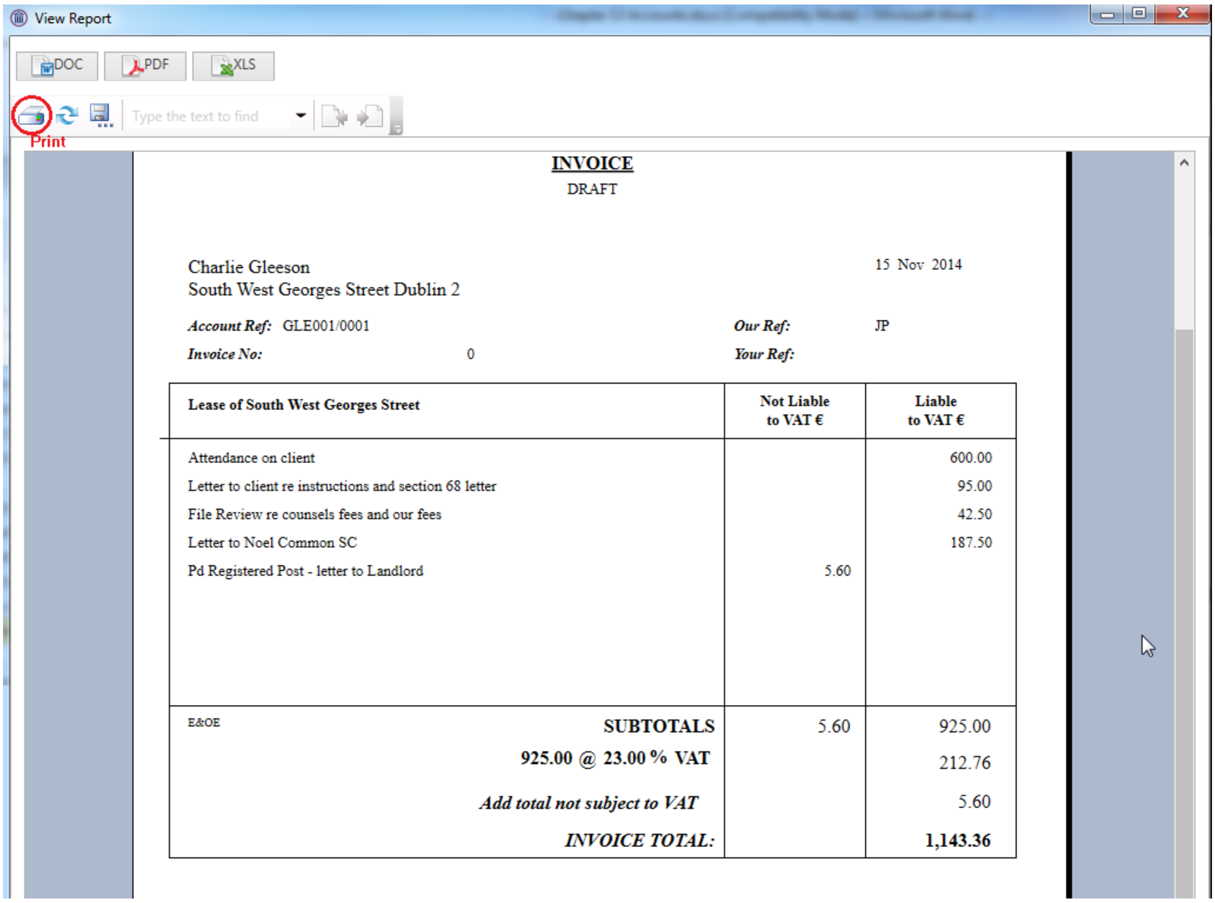
NOTE: This feature is only available if you have been given permission by the system Administrator

How to Print a Draft Bill

1. Go to **My Invoices click** on the bill you want to Print; the draft bill will appear.

2. Click on the **Print Copy** button.

3. Click on **Print** located on the report toolbar to print the draft bill.



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 Liable to VAT €	Liable 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**

Credit Notes

If a Credit Note is required, please contact your Accounts Department. Credits notes will have an impact on all billed time related to the original invoice regardless of the value of the credit note.

My Cheques

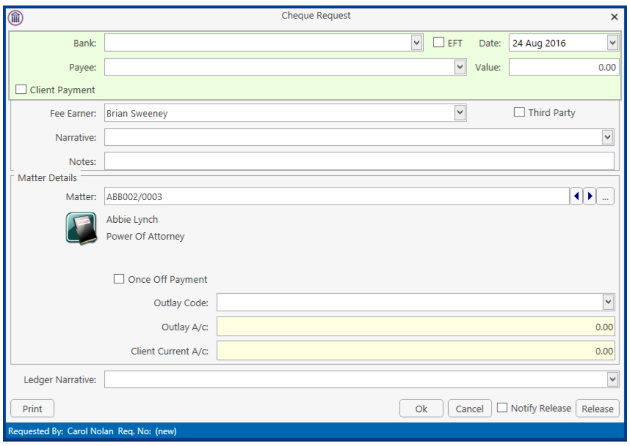
How to Create a Cheque Request

1. View **My Cheques** as described above.

2. Click **Add** on the Home tab.

3. Input the following information:

Bank:	Select from the drop-down list.
Date:	Today's date will be shown by default; change as required.



Payee: Input the Payee's name or select a supplier from the drop-down list.

Value: **Input** the amount of the cheque.

Fee Earner: This will default to the current fee earner. Select a different fee earner from the drop-down list if required.

Third Party: Check the box if this is a third-party cheque.

Narrative: **Input** a cheque narrative or click on the down arrow to pick from a list of narratives.

Notes: **Input** a note to the Accounts Department if required.

Cheque Payment: Tick box if Payee is to be paid by cheque

EFT: Tick box if Payee is to be paid the Electronic Funds Transfer

Matter: This will show the current case. To select a different case, click on the browse button for the matter list and **double-click** the required case.

Notify Release: Check this box if you want an email to be sent to the Accounts Department when the cheque has been released.

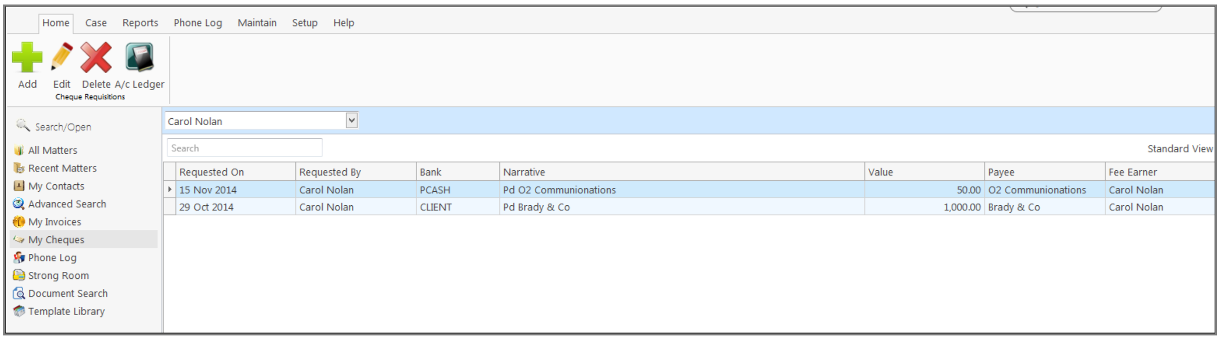
Ledger Narrative: By default, to the cheque narrative will be shown but it can be amended either manually or by selecting from the drop-down list.

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

How to View My Cheques

1. Click on Search/Open on the Navigation.

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



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

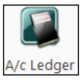
1. View **My Cheques** as described above.
2. Select the cheque you want to delete.
3. Click **Delete** on the Home tab.

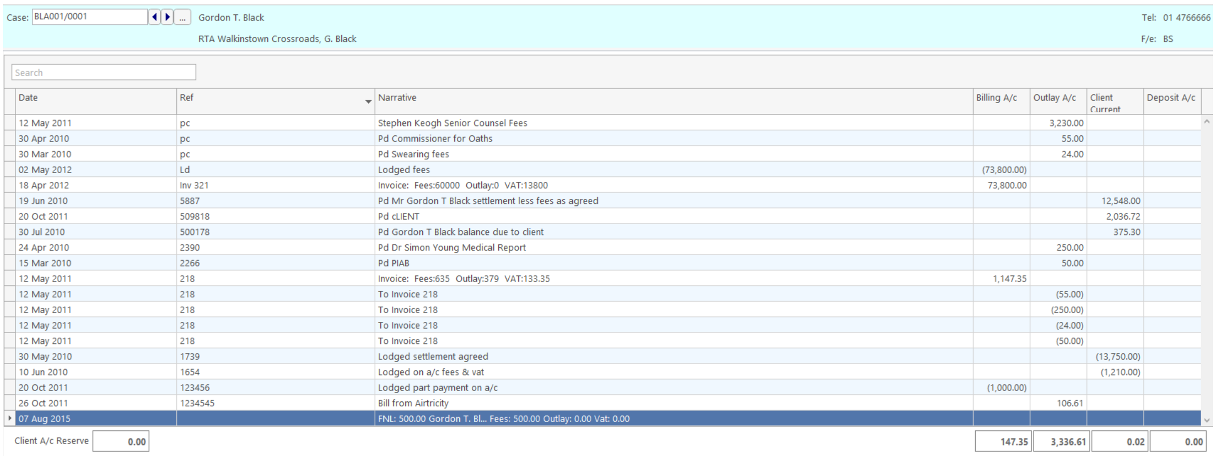
How to Release a Cheque Request

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 dialog box.

How to view the A/C Ledger

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





Case: BLA001/0001 Gordon T. Black Tel: 01 4766666
RTA Walkinstown Crossroads, G. Black F/e: BS

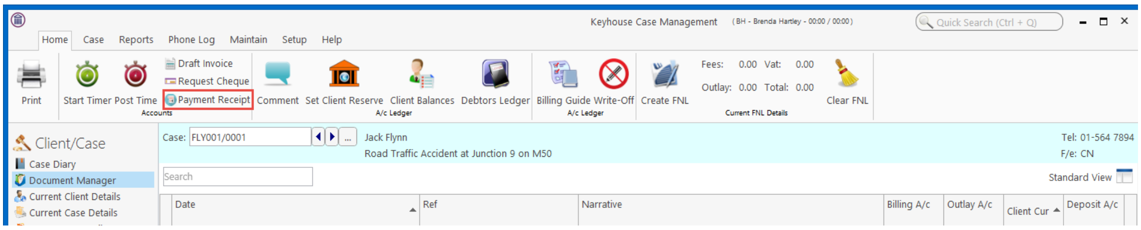
Search

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

Receipt for Payment

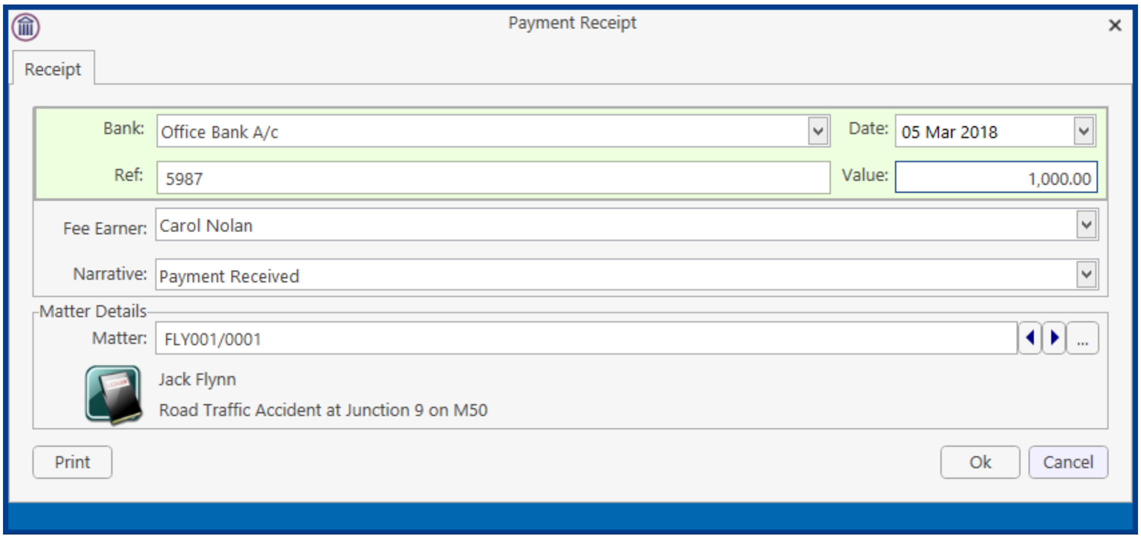
A Receipt for payment can be generated from the system. This option must be activated by your System Administrator. If you want to use this feature, a Receipt Layout will need to be created for you.

1. On the Account Ledger for the Matter, click Payment Receipt.



2. The following dialog box appears. The bank has been prepopulated with a default setting. This can be changed.

3. Enter the details



4. To print the receipt, click Print. Click OK to finish.

Chapter 14: The Debt Ledger

How to View the Debt Ledger

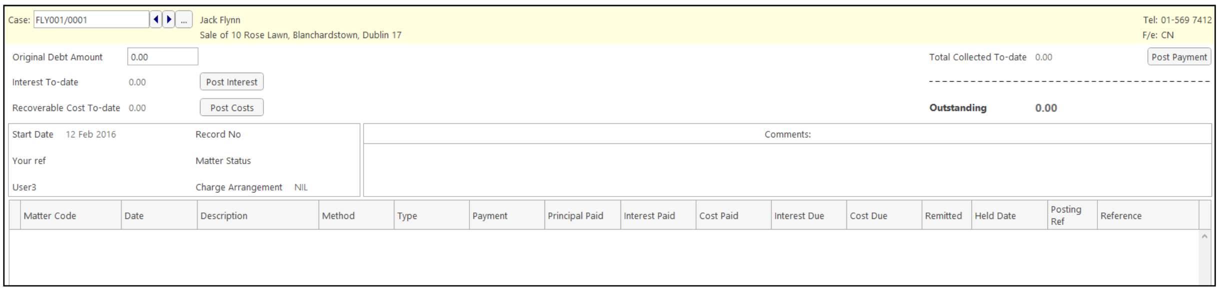
1. **Open** a case in the **Case Diary**.

2. Click on **Debt Ledger** in the **Case diary** navigation panel. The Debt Ledger will be displayed.

How to add the original debt

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

2. Click on **Debt Ledger** on the **Case diary** navigation panel. The following screen will appear.



3. **Input** the Original Debt amount.

4. Click the check mark beside the amount to confirm.

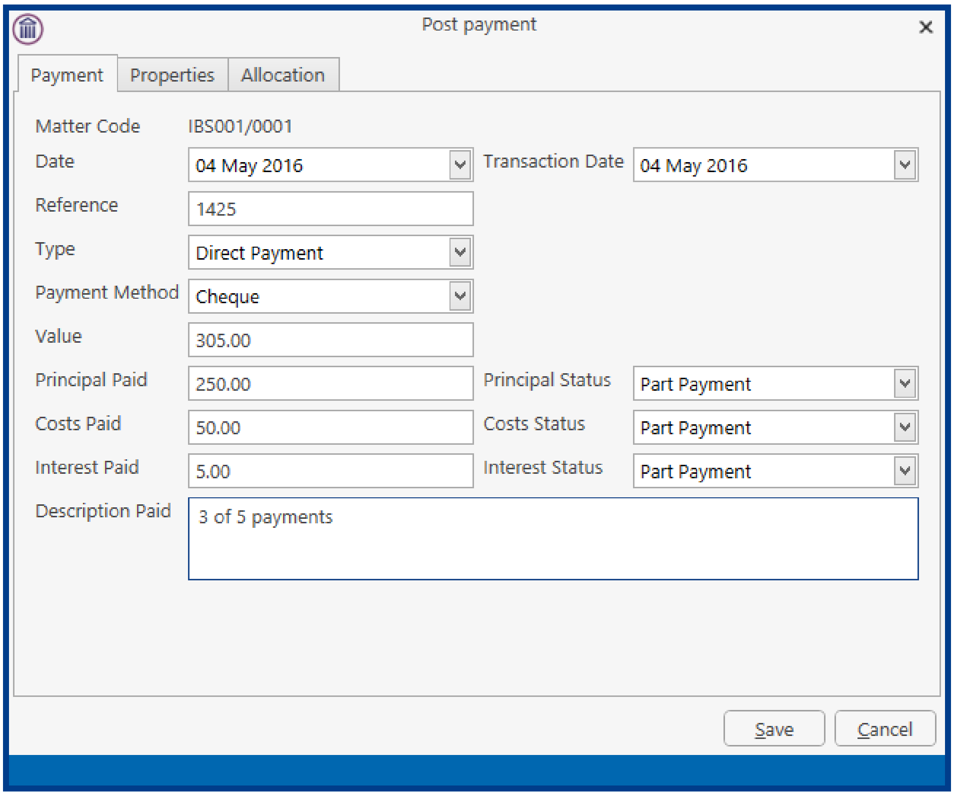
Note: The **Balance of Debt** will update automatically as postings are made.

How to Post a Payment

1. Click on **Debt Ledger** on the **Case Diary** navigation panel.

2. Click **Post Payment.**

3. Input the following information on the **Post Payment** dialog box



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.

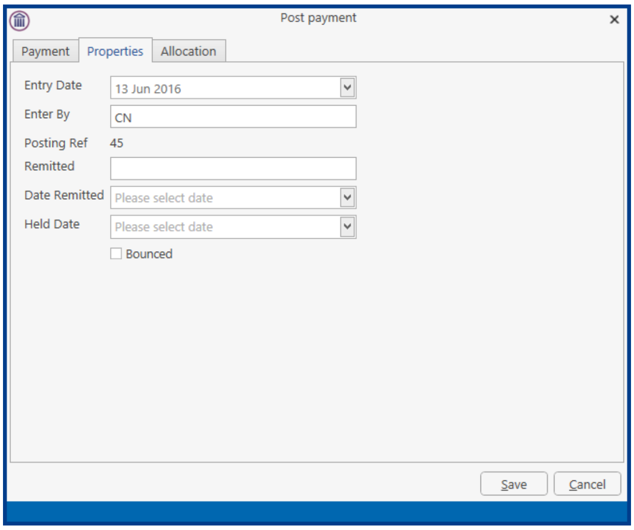
Costs Status: Select the **Cost Status** applicable from the drop-down list.

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.

4. Click to the Properties Tab



Entry Date: The **date** will default to today's date.

Enter By: The **handler code** will be entered by default.

Posting Ref: The next **reference** in the sequence will appear.

Remitted: Automatically populated.

Date Remitted: Enter the **date** the payment was received

Held Date: Used for the Revenue Module only.

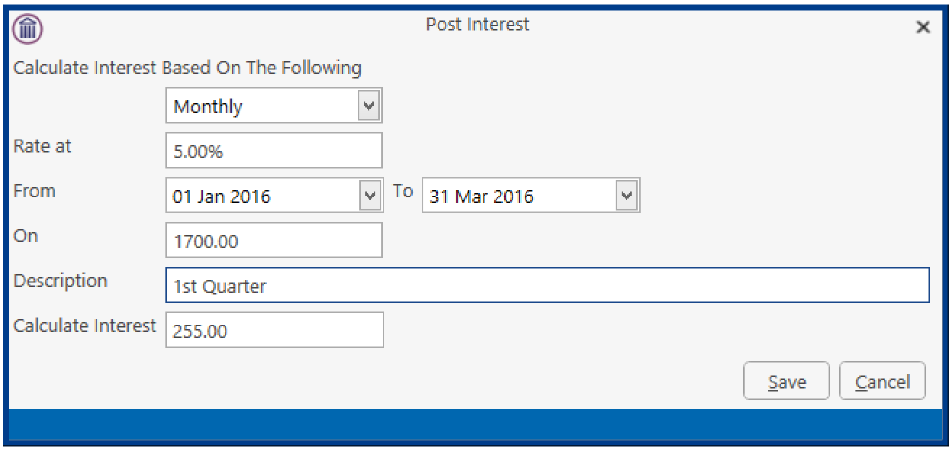
Bounced: Tick if the payment is returned unpaid by the bank.

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

NOTE: Allocation relates to the Revenue Module only.

How to Post Interest

1. Click on **Post Interest**.



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

Term: Select Monthly, Yearly etc. from the drop-down list.

Rate at: **Input** the rate of interest

From: **Input** the start date or click the down arrow to select from the calendar.

To: **Input** the end date or click the down arrow to select from the calendar.

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

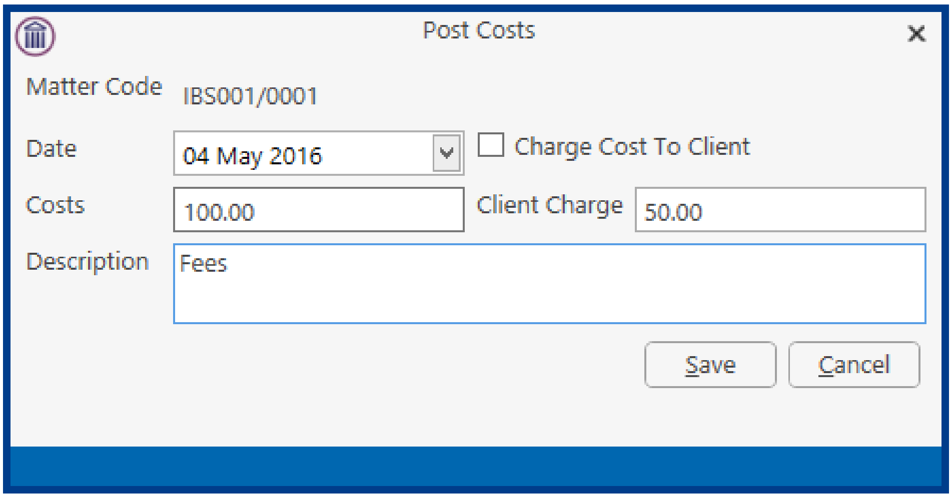
NOTE: Once the information is provided the interest will calculate automatically and will then be displayed in the Calculated Interest box.

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

How to Post Recoverable Costs

1. Click on **Debt Ledger** on the **Case Diary** navigation panel.

2. Click on **Post Costs**.



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

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

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

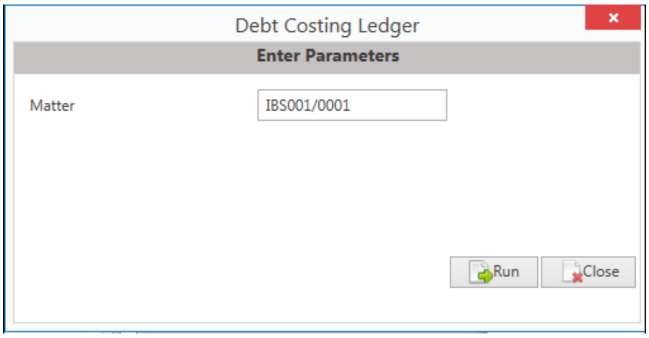
How to Amend an Entry

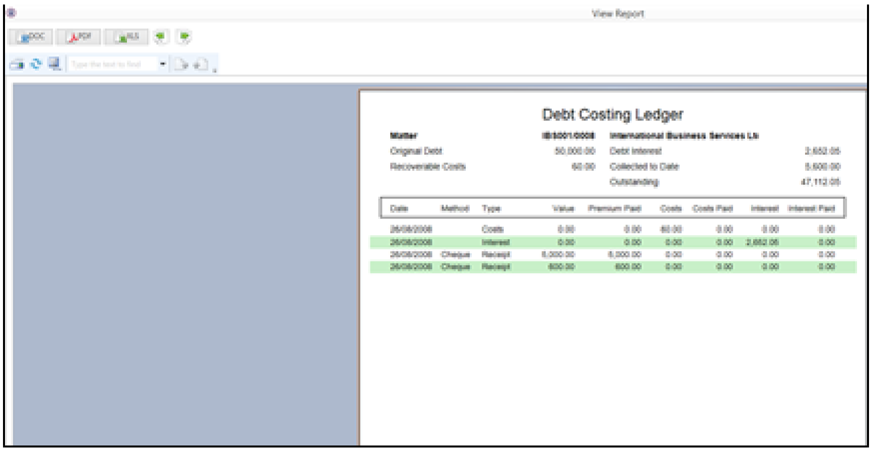
1. Click **Debt Ledger** on the **Case Diary** navigation panel.
2. Double click on the entry you want to amend.
3. Amend as required and click **Save** to post the change.

How to Print a Debt Ledger Report

1. Click on **Debt Ledger** on the **Case Diary** navigation panel.
2. Click on **Print** on the Home tab. The following dialog box will appear.

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





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

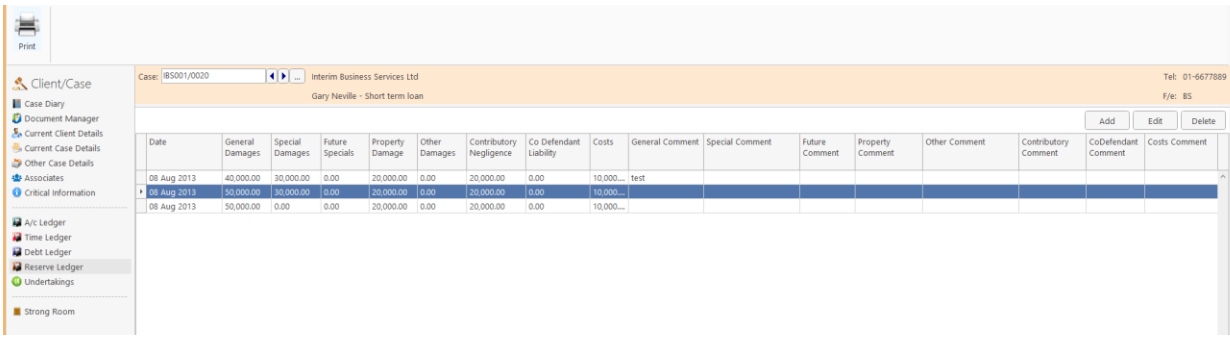
Chapter 15: The Reserve Ledger

The reserve ledger is used in defence 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**.

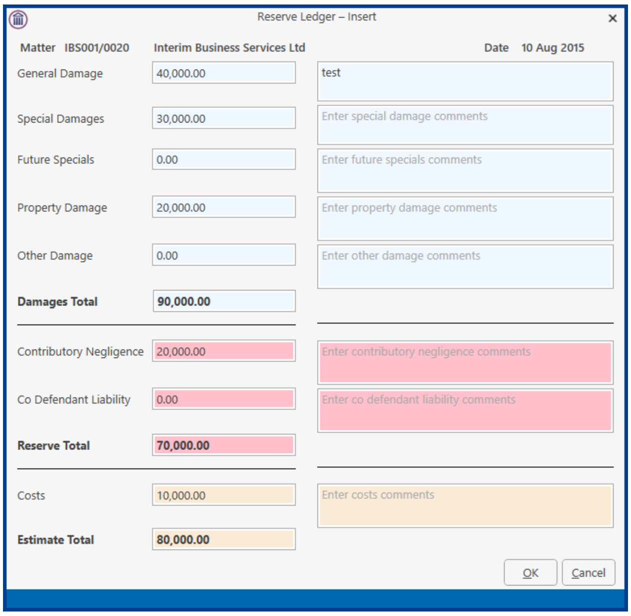
2. Click on **Reserve Ledger** on the **Case Diary** Navigation panel. The Reserve Ledger will be displayed.



How to Add an Entry

1. Click on **Reserve Ledger** on the **Case Diary** Navigation panel.

2. Click the **Add** button to create an entry.



3. 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.

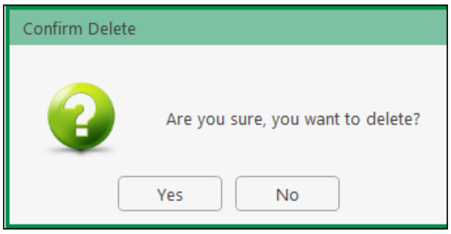
   The **Damages Total**, **Reserve Total** (Damages Total less Contributory Negligence and Co-Defendant Liability) and **Estimate Total** (Reserve Total plus Costs) will be calculated automatically.

4. 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** dialog box (see above) will appear.
3. Make the required changes.
4. Click **OK** to save the changes.

How to Delete an Entry



1. Click **Reserve Ledger** on the **Case Diary** Navigation panel.
2. Select the **entry** you want to delete, then click **Delete** on the Home tab.
3. You will be asked to confirm the deletion.
4. Click **Yes** to confirm.

How to Print the Reserve Ledger

1. Click **Reserve Ledger** on the **Case Diary** Navigation panel.
2. Click **Print** on the Home tab.
3. A report will run; to print the report, click the Print icon on the report toolbar.

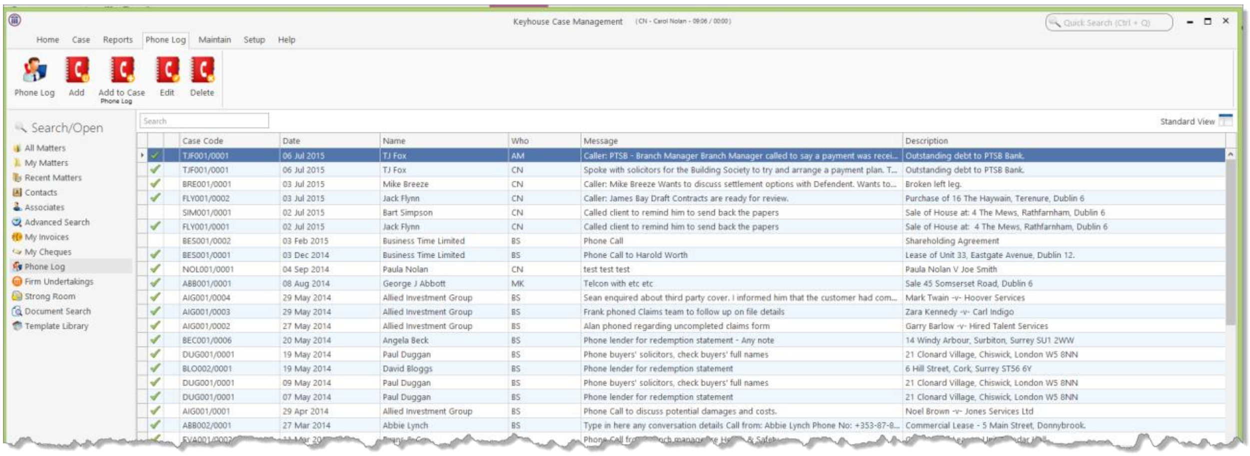
Chapter 16: Phone Log

Viewing, Searching and Sorting the Phone Log

How to view the Phone Log

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

2. Click **Phone Log** on the Navigation panel.



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

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

Search the Phone Log

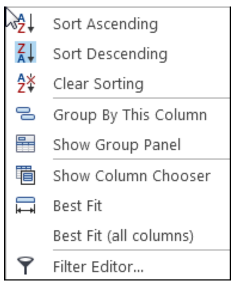
1. Open the Phone Log.

2. Click in the search box.

3. Input the search terms.

4. To clear the search, click the Clear button to the right of the search box. 

How to Sort the Phone Log



1. Open the Phone Log.

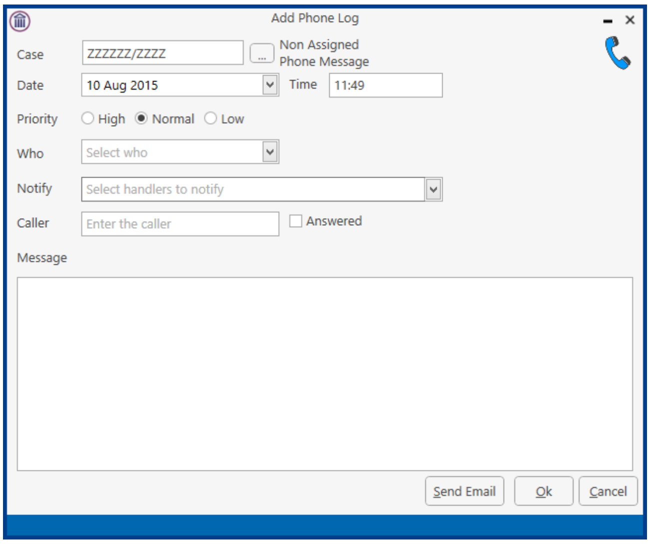
2. To Sort by column click on a column heading, e.g. Name.

3. To clear the sort right, right-click on the column heading and select **Clear Sorting** from the pop-up menu.

How to add a phone message

1. **Open** the phone log.

2. Click **Add** on the Phone Log tab.



Input the following details on the Add Phone Log dialog 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.

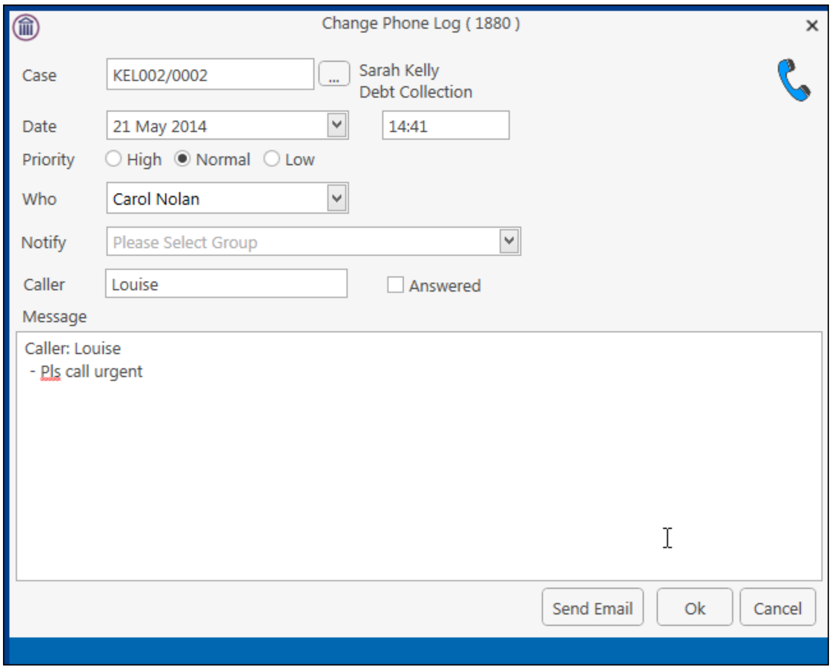
3. Click **OK**. The message will appear in the selected person's task list.

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.



3. Amend as required.

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

How to delete a phone message

1. **Open** the phone log.

2. Select the message you want to delete.

3. Click **Delete** on the Phone Log tab. You will be asked to confirm the deletion.

4. Click **Yes.**

NOTE: If you delete a message it will be removed from the system completely.

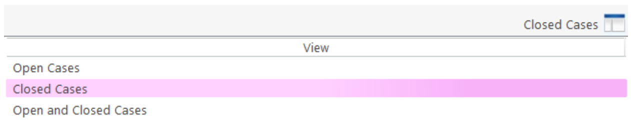
Chapter 17: Closed Cases

How to Search for Closed Cases

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

2. Select **All Matters** on the Navigation panel.

3. Click the **View** icon on the right of the window. The Standard View is shown by default.



4. Select the required View

- **Closed Cases** to search only closed cases
- **Open Cases** to search only open cases.
- **Open and Closed Cases** to search both lists.

5. Input a search term in the search box; the search will update as you type.

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

1. Search for the closed case as described above.

2. Double click the required case to view the Case Diary.

3. Click on **A/C Ledger** on the Navigation panel to view the archived ledger.

Note no amendments can be made in the Case Diary unless the case is reopened.

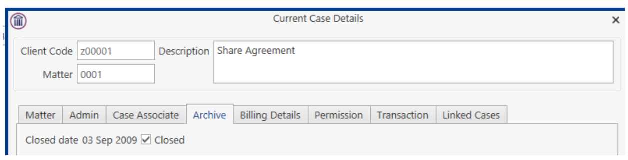
How to reopen a closed case

1. Search for the closed case as described above.

2. Double click to open in the Case Diary.

3. Click on **Current Case Details** on the Navigation panel, to see the Current Case Details screen.

4. Select the **Archive Tab** in Current Case Details.

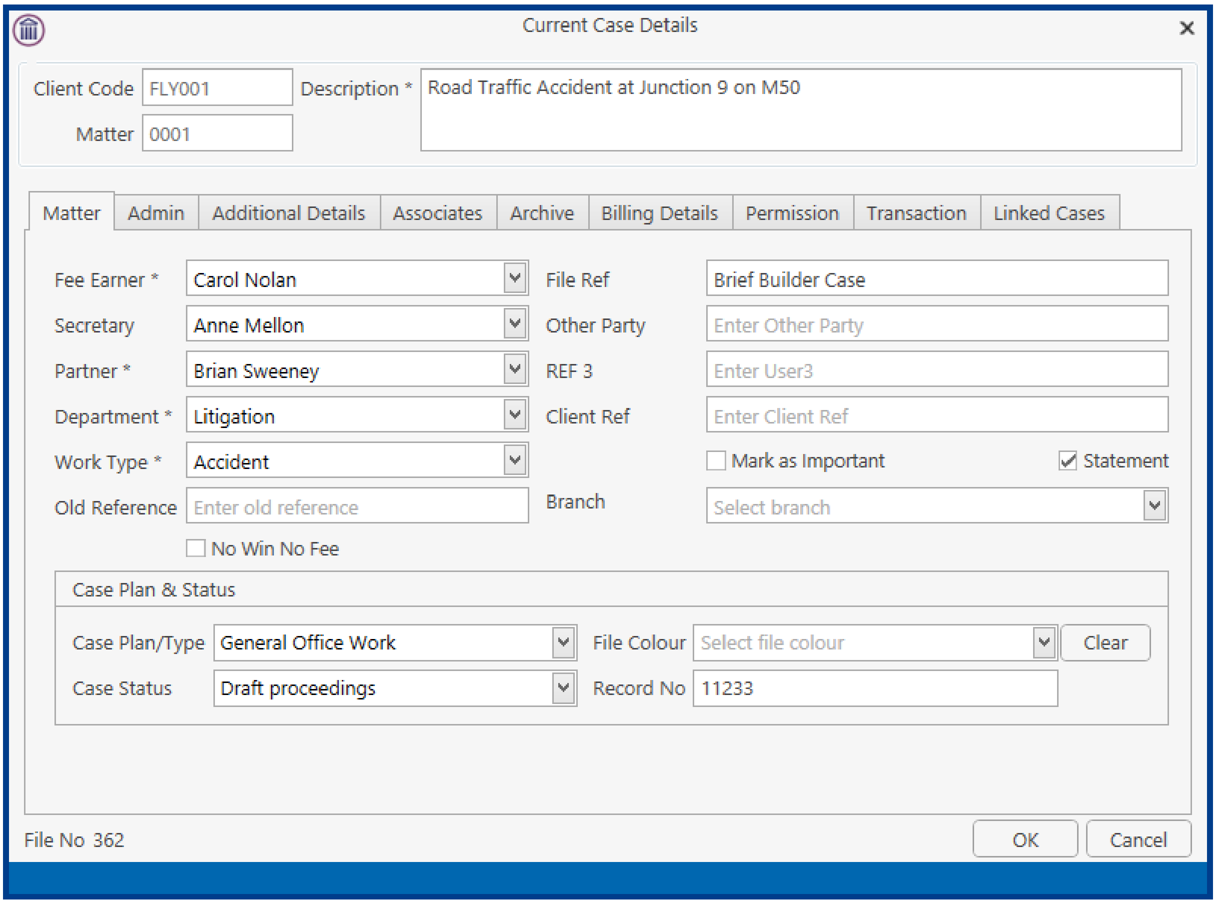


5. Uncheck the box marked **Closed**. The case is now reopened.

How to close a Case

Before archiving a matter ensure that all balances are nil, all time is posted to the time ledger and all tasks in the Case Diary are marked as complete.

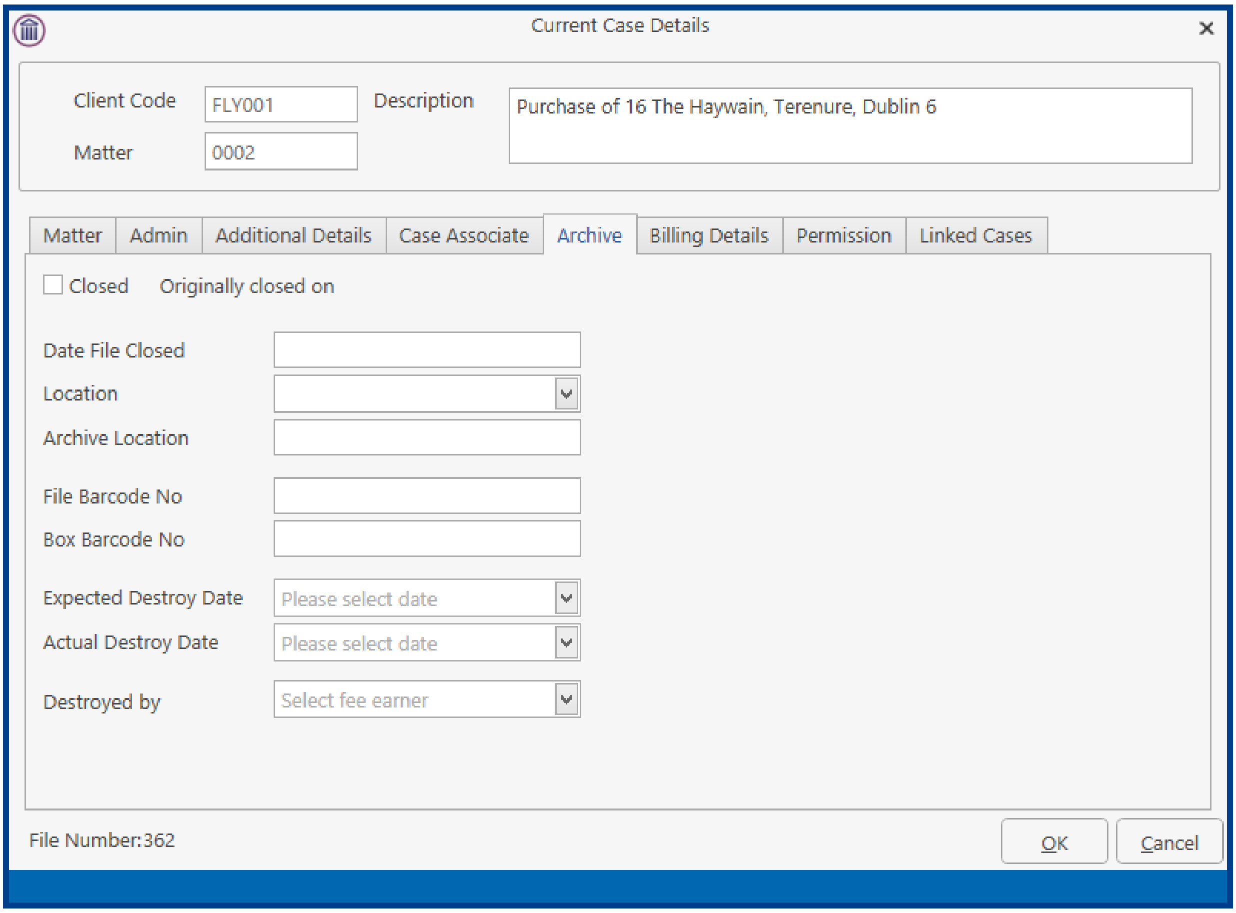
1. Click on **Search/Open** on the Navigation panel.
2. Select **All Matters** on the Navigation panel.
3. **Search** for the case in the normal way.
4. **Double click** to open in the Case Diary.
5. Click on **Current Case Details** on the Navigation panel, to view the Current Case Details screen.



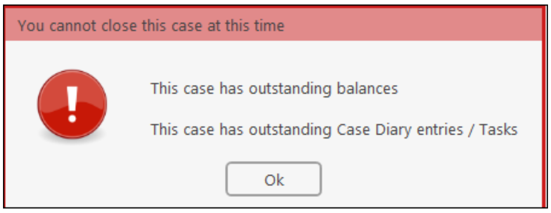
6. Select the **Archive Tab**. This will be greyed out if you don't have the required permissions.
7. Enter the details including Expected Destroy Date. This can be set by default but the default period must be set by the System Administrator. This can, however be overwritten if necessary by added the required date to the Default Date field. If the default has been set, then leave it blank, and it will be completed automatically once OK has been selected

   Note: If items are being held in the Strong Room (e.g. Deeds, Wills), it may be necessary to set the Expected Destroy Date further into the future that would be standard.

8. Check the box marked **Closed**.

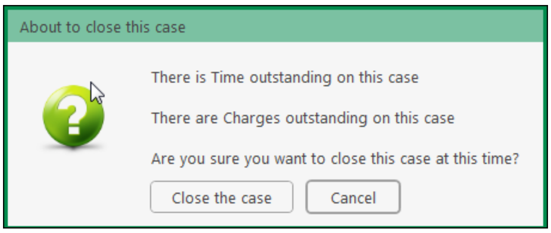


9. If the case cannot be closed because there are uncompleted tasks or there is an account balance, a warning message will be displayed, giving the reason why the case cannot be closed.



Or

If there is unposted time or there are charges outstanding, an alert message will be displayed. In this case, you may proceed with the closure of the case or **Cancel** it.



Chapter 18: The Brief Wizard

This tool automates the task of generating a brief to counsel, saving you time. It amalgamates all the required documentation in chronological order into relevant sections, complete with a cover page, table of contents and pagination.

With the redesign of the brief builder, it is now faster to generate a brief, with better quality documents. The option to use the Classic Brief Builder is still available and instructions for its use are outlined in older versions of the manual.

Important Steps for preparing your Brief

1. Review your documents in the **Document Manager** and ensure the necessary files are classified and the Document Date is correct as it will be in your brief. See **How to reclassify Documents** and **How to change the Document Properties** (p. 102)

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 it is not advisable to use your PC for any other purpose as it will slow down the generation of the brief.

4. Please review the earlier part of this chapter (Document Manager, particularly p. 97 above) for details on how to rename and reclassify a document.

   If you need assistance adding **Document Classes,** please contact your Keyhouse administrator or support@keyhouse.assist.com

Assembling a Brief

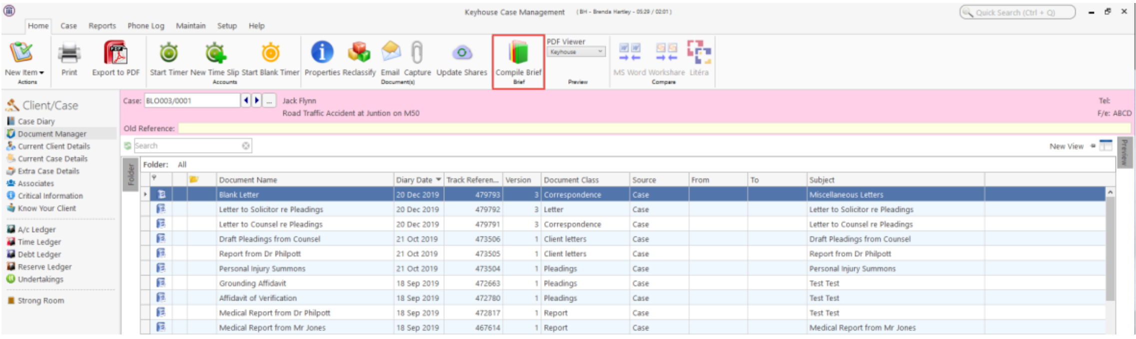
There are three options available to create a brief.

Option 1 – Create a brief and add all required sections and document individually
Option 2 – Create a brief using a pre-existing Template
Option 3 – Create a brief using all existing Document Classes

All briefs are started the same way. Using the Wizard allows users to choose the option that best suits the matter.

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

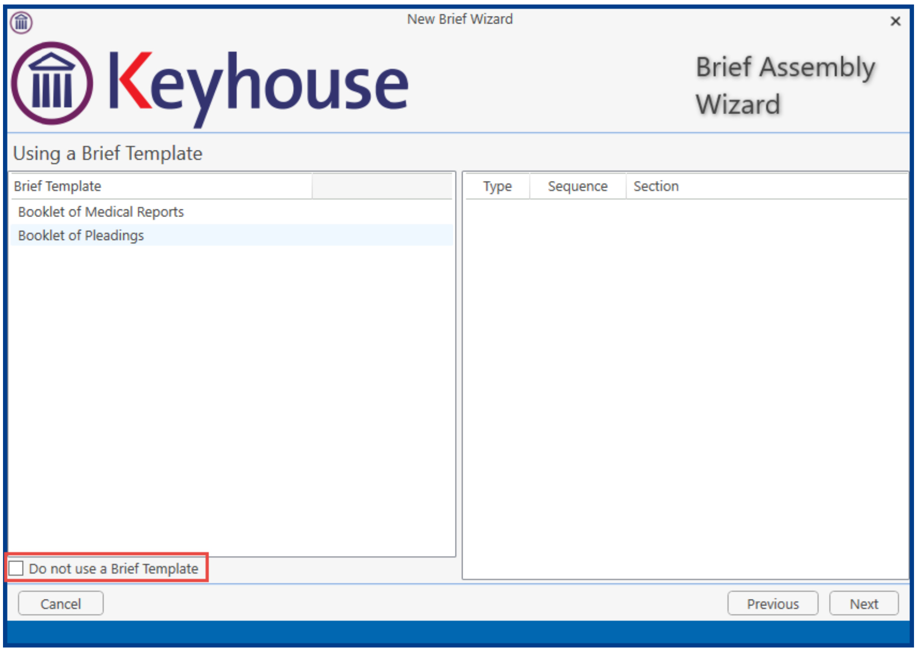
2. Click **Document Manager** on the Navigation panel.



3. Click **Compile Brief** on the Document Manager Home tab.

4. The Welcome screen appears. Click Next.

5. The Brief Assembly Wizard will start with a welcome screen. Click **Next** to continue.



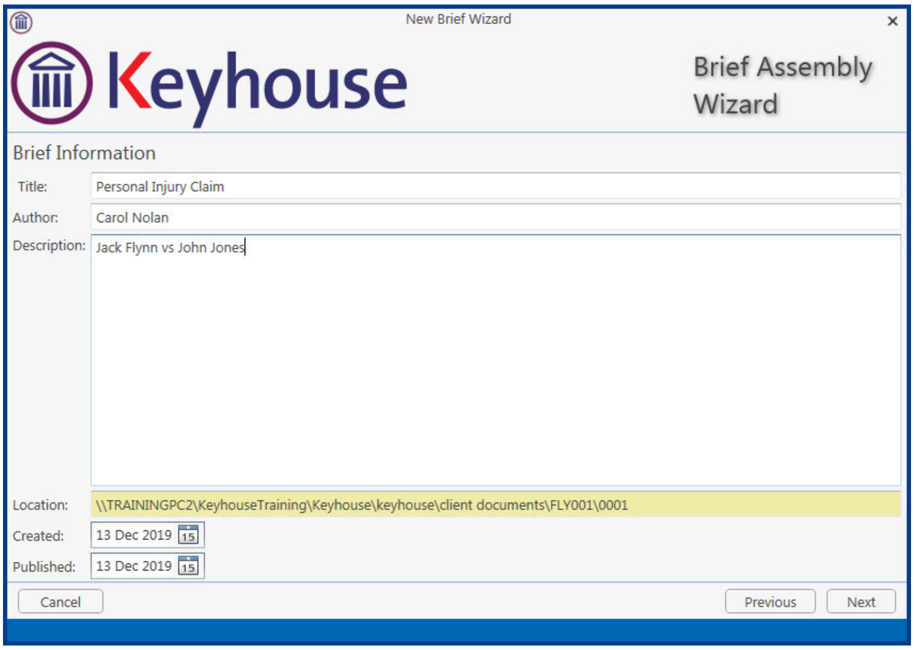
6. If Brief templates have been set up on the system, you may either select one or check **Do not use a Brief Template**.

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

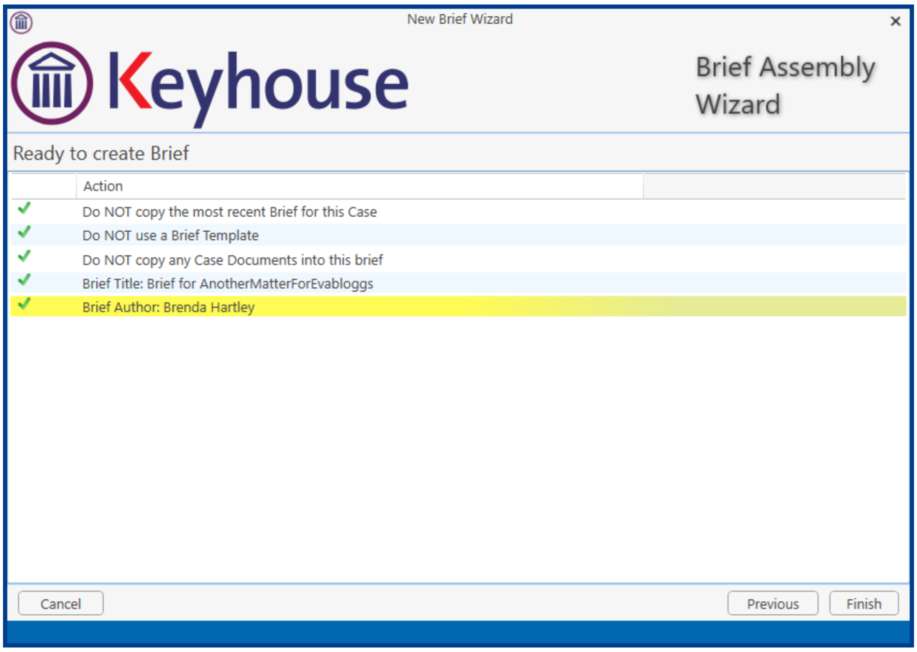
- ***Option 1 - Do not copy any documents into the brief***: Documents will not be added to the brief automatically, but you will be able to drag and drop documents from the Section ***Not included in this Brief*** into the appropriate section.
- ***Option 2 - Copy documents into the brief when their Class matches a brief section***: Any document whose Document Class matches a section of the Brief will automatically be copied into that section.
- ***Option 3 - 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.

8. Click **Next** to continue to the **Brief Information** screen. You may accept the default Title and Description or amend as required.

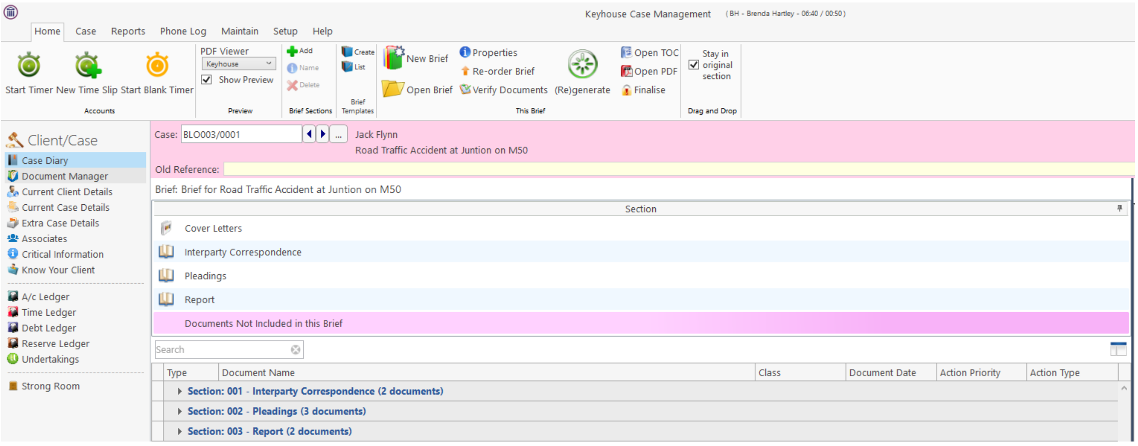


9. Click **Next** to continue to the final screen of the wizard, which will contain a summary of the options you have selected. This screen will vary depending on the option chosen on the previous screen. You can make changes by checking and unchecking the boxes or click **Previous** to go back to earlier screens.

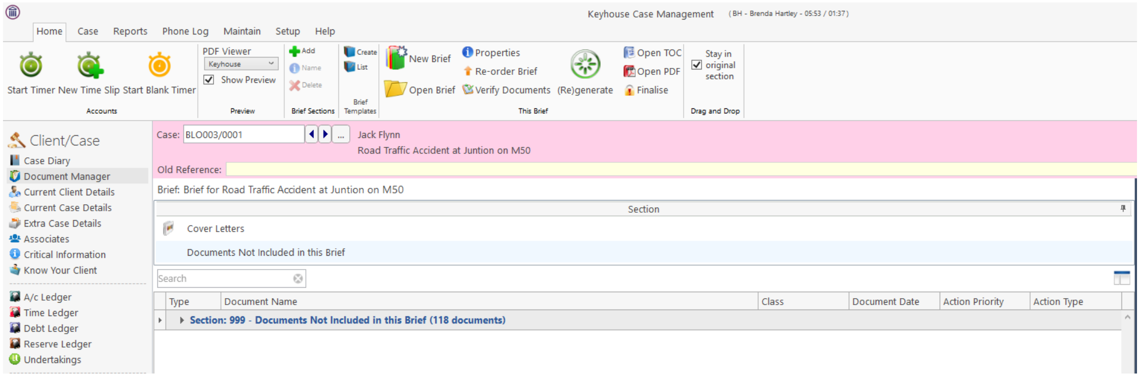


10. When you are satisfied, click **Finish**.

11. The sections in the brief will be displayed if Options 2 or 3 were selected.



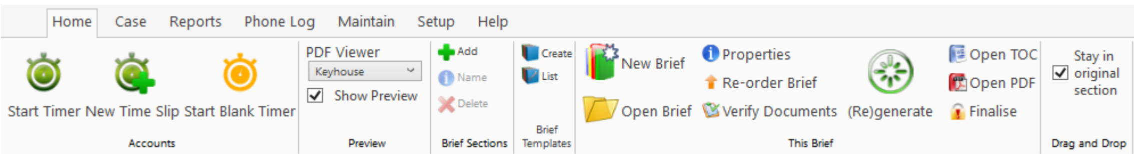
A generic section will appear if Option 1 is selected.



Brief Home tab

Brief Home Tab

The Home tab in the Brief:



PDF Viewer	Allows the user to choose a view of their choice. However, the Keyhouse Viewer is recommended.
Show Preview	When this option is ticked, the user can preview documents in the brief.
Brief Section – Add, Name & Delete	Enables the user to create and maintain their own brief sections. It can be used when documents are not brought into the brief based on their existing document classification.
Brief Template – Create and List	The user can create a template brief based on an existing brief. List will show all current templates.

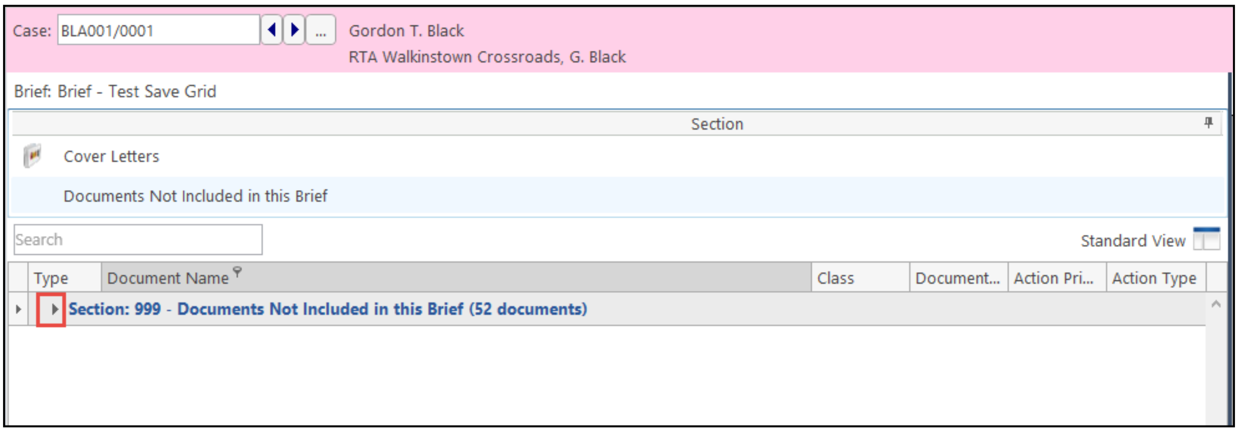
New Brief	Allows for the creation of additional briefs.
Open Brief	Allow user to open any existing brief.
Re-Order Brief	Returns all documents to their original location in the brief.
Properties	Allows the user to change the Title and Description of the Brief.
Finalise	When applied to a brief, it will prevent the brief from being changed. The brief can be reopened should changes need to be made.
Verify Documents	Checks that all documents can be added to the brief and will highlight any issues.
(Re)generate	Generates the brief with an Index.
Open TOC	Opens the Table of Contents in Word.
Open in PDF	Opens the brief in PDF format.
Stay in original section	When dragging documents from one section to another, Stay in original section will allow the user in the first section once the documents are moved to the new section.

Working with the Brief

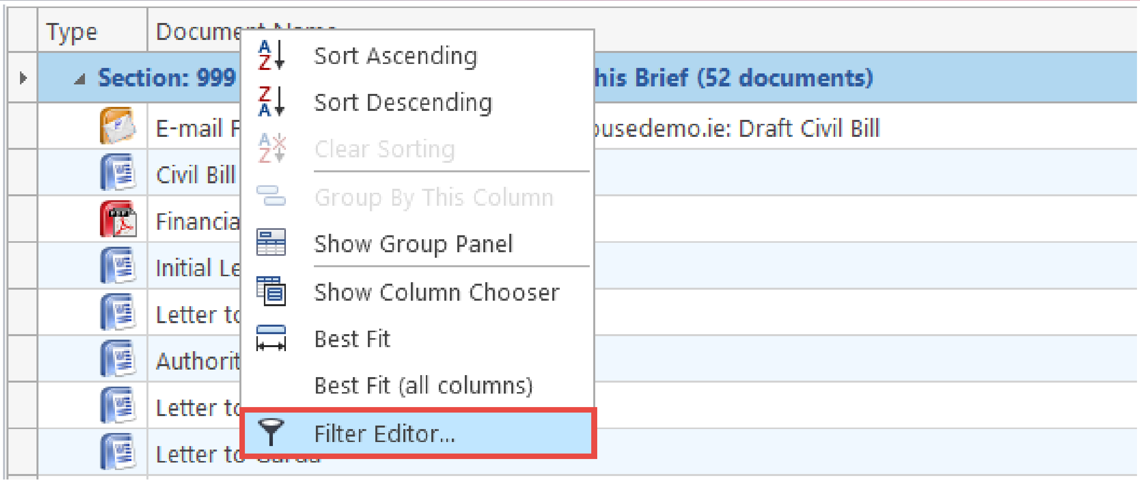
Removing Image Files from the Brief

When creating a brief, you may want to limit the documents/classifications that are available for selection. This can now be done by creating and saving views. This can be used regardless of the option used to create it.

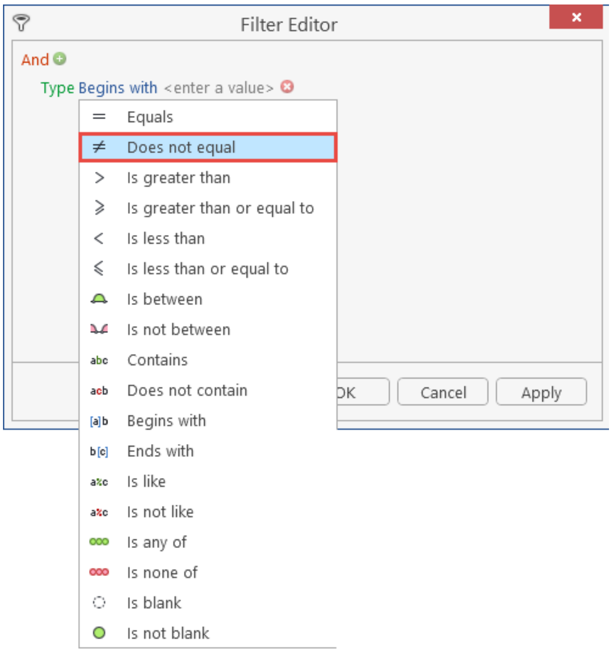
1. Click on the Arrow to the left of the Section number.



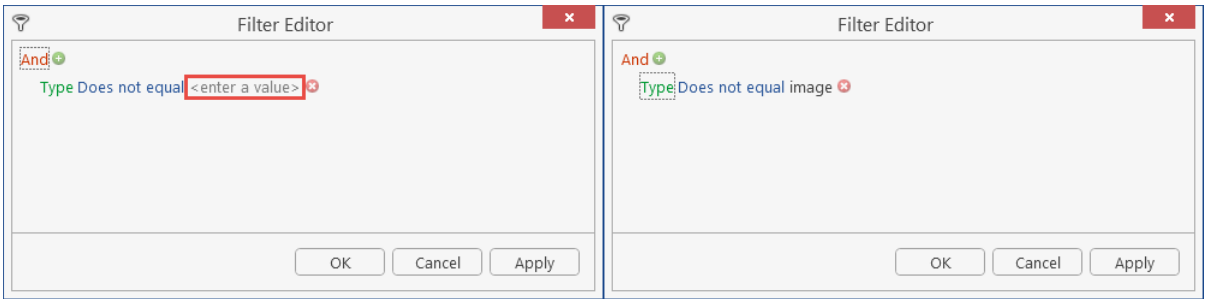
2. Right click on Type on the Header Row and select Filter Editor



3. Click on Begins with and select Does not equals



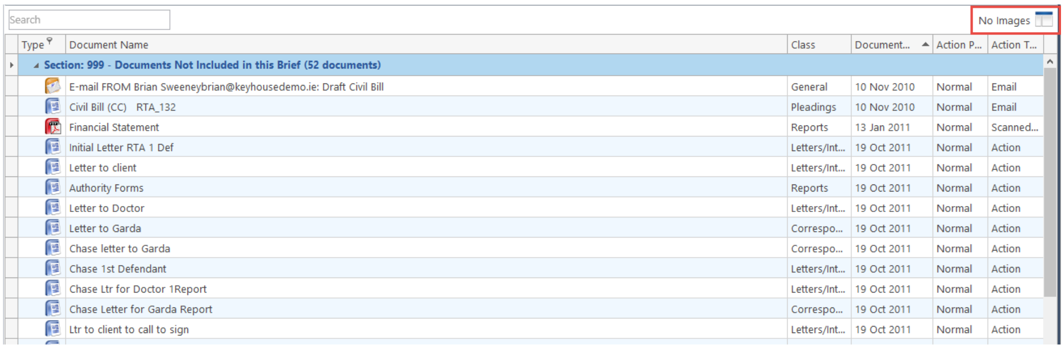
4. Click on **Enter a valu**e and type Image



5. Click **Apply** and **OK**

6. All images have been removed from the documents

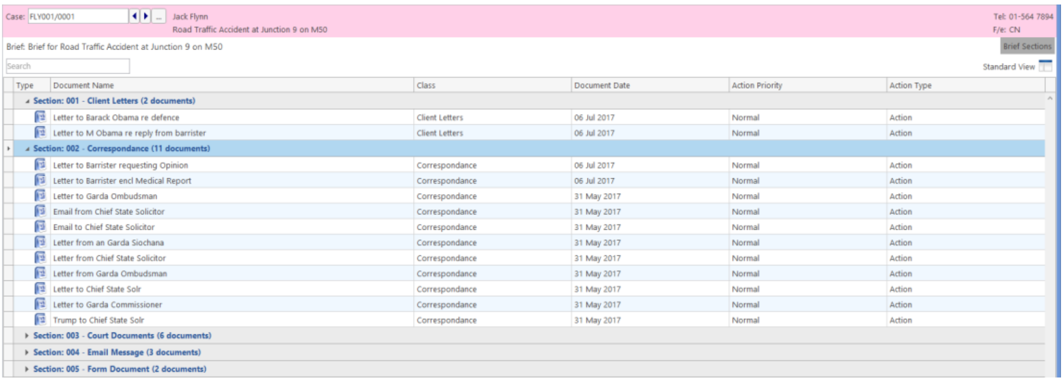
7. Save the view as normal to make it available for future briefs. (See Creating User Views p.g.**Error! Bookmark not defined.**.)



> **NOTE:** This can also be done using the Document Name. Set the filter to Does not Contain and the value as Image.

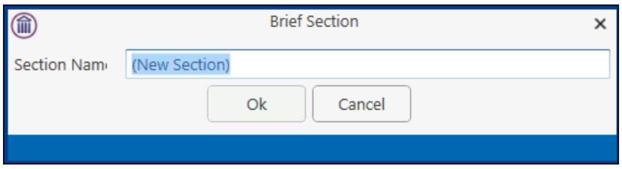
How to adjust column Widths

1. Click on the line between the headers and drag to the left or right



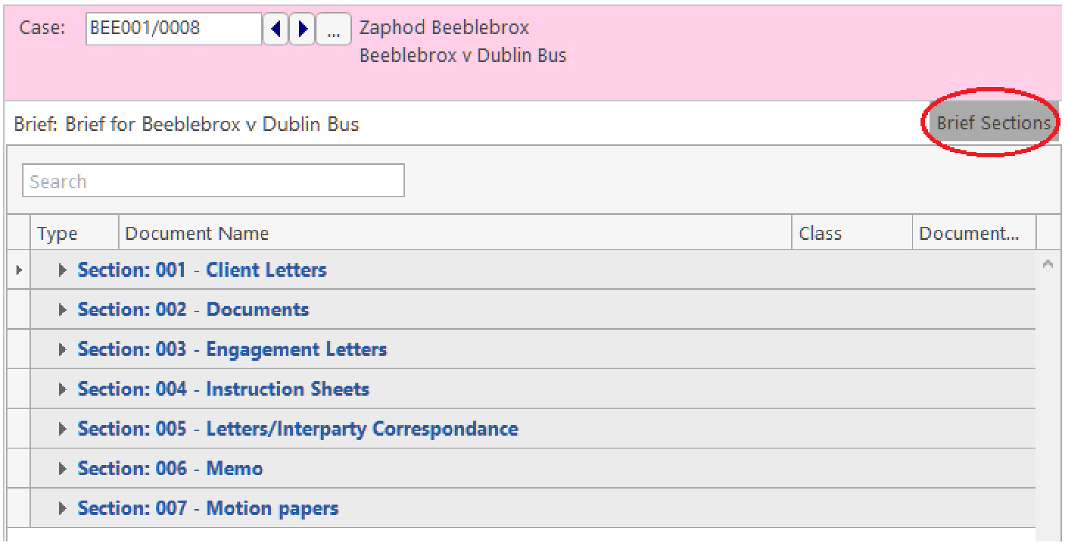
How to Add a Section

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.



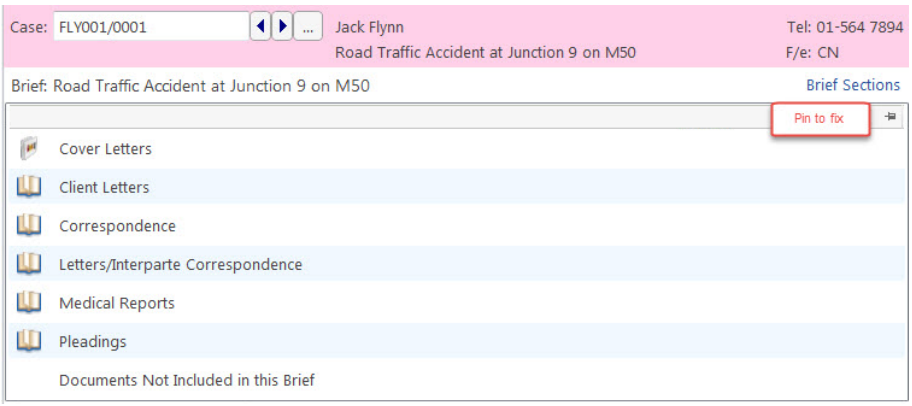
How to amend a Section Name

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 on the section and choose **Section Name** from the pop-up menu.

   Name the new section and click **OK** to confirm.

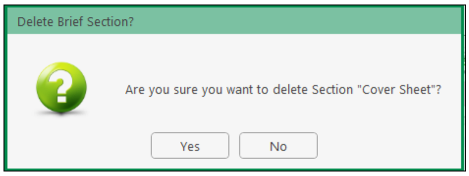
How to delete a Section

1. Click **Brief Sections** on the right of the brief screen (See How to amend a Section Name, p.g. 210 above).
2. Select the **Section** you want to delete.

3. Click D**elete** 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**.

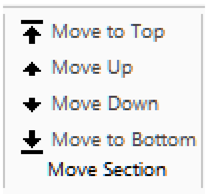


How to change the order of Sections

1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 210 above)

2. Select the **section** you want to move.

3. Use the buttons on the Right Click Menu to change the position of the section in the brief.

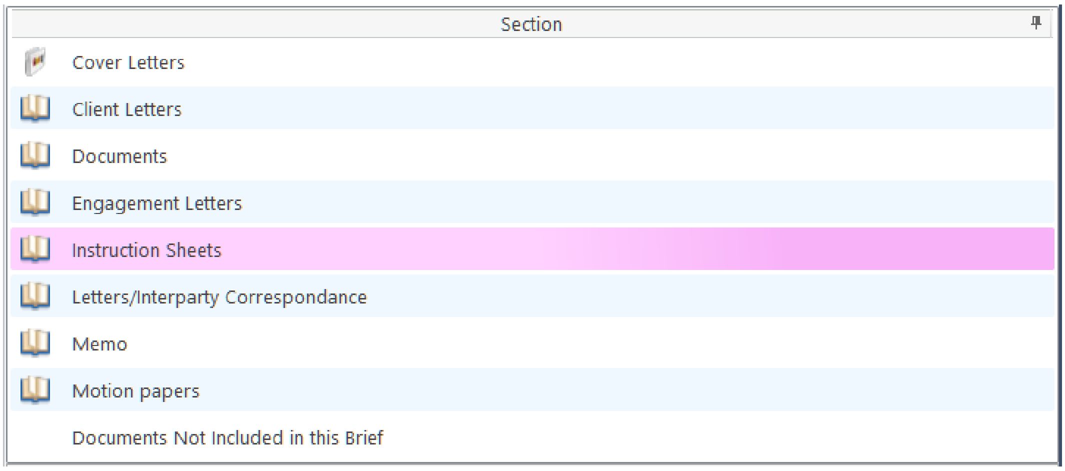


Move the selected section **to the top** of the list of sections.
Move the selected section **up one position**.
Move the selected section **down one position**.
Move the selected section **to the bottom** of the list.

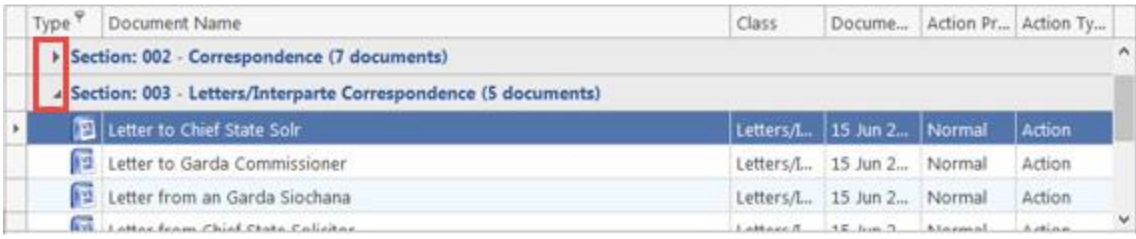
How to Move a document to a different section

1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p.g 210 above)

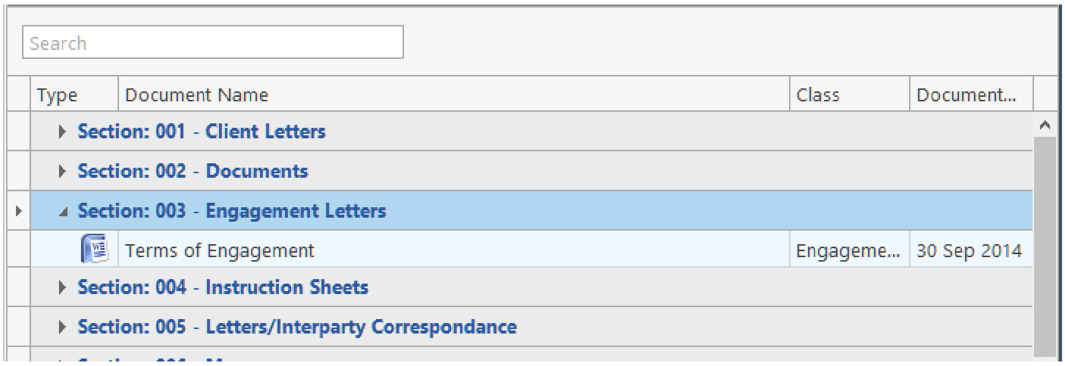
2. Pin the **Brief Sections** so that they remain visible.



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).



TIP: The Column width can be adjusted to make reading document information easier.

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. 210 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.

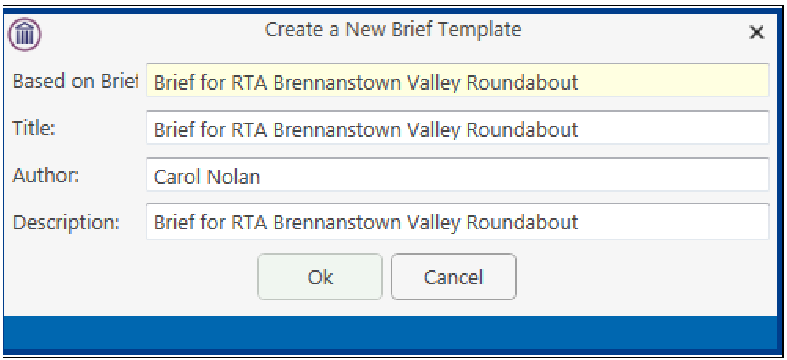
> ***NOTE:*** ***Main*** sections are included in the Table of Contents; ***Cover*** sections are intended to contain cover letters and similar preliminary material.

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 dialog box **Create a New Brief Template**

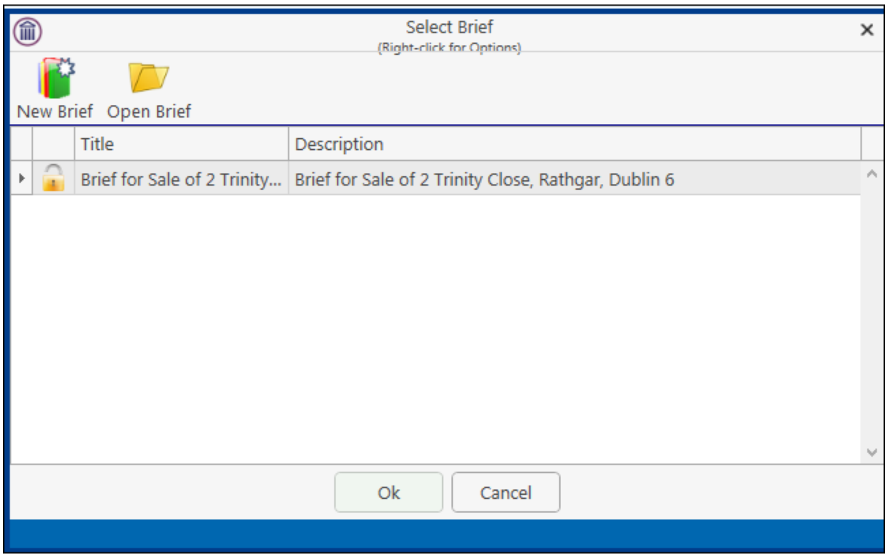


By default, the template title will be the same as the title of the Brief on which it is based. As it is to be used as a template, it may be advisable to change it to something more generic.

3. Click OK.

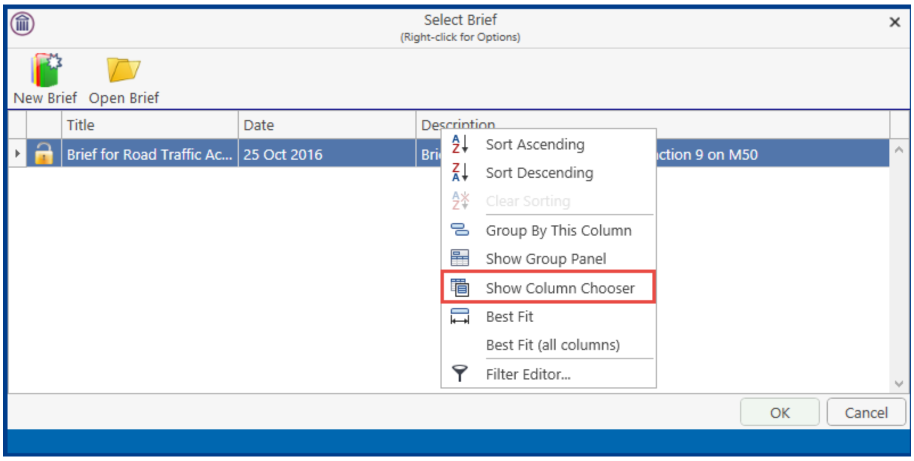
How to Open a Brief

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

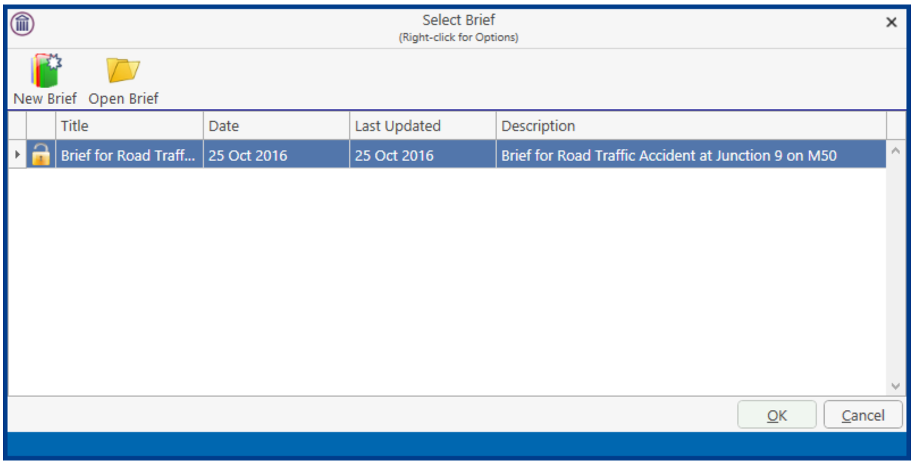


4. Select the brief to open and click **Open Brief**.

5. To see when the brief was last updated, right click on the Header Row and right click.



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



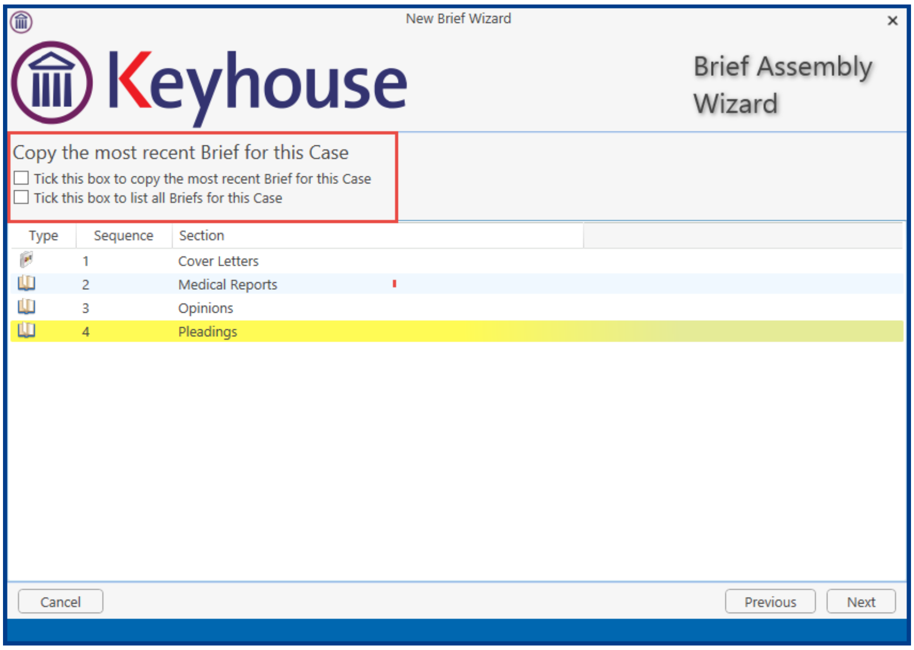
Note if the brief has been saved to the Case Diary, it can be opened from there like any other documents.

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

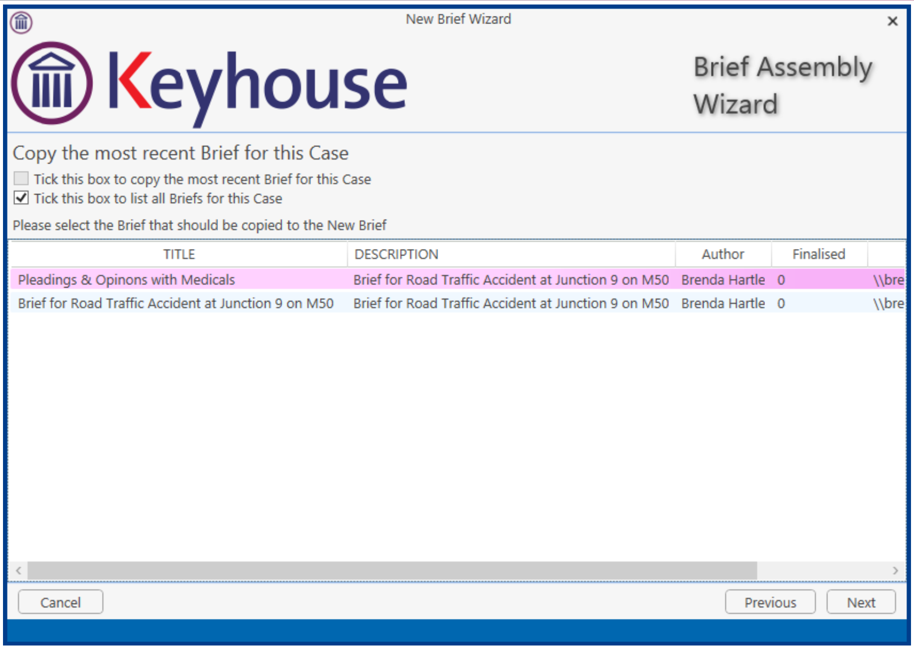
Build a Brief based on a previous Brief

1. Click Compile Brief on the Document Manager

2. Select New Brief and click Next



3. To base the brief on the most recent brief, select **Tick this box to copy the most recent Brief to this Case** and complete as normal
4. Tick the **Tick this box to list all Briefs for the Case** to use an existing brief as the basis for a new brief.



5. Select the brief to be used and click Next

6. Complete the brief as normal.

Generate the Brief

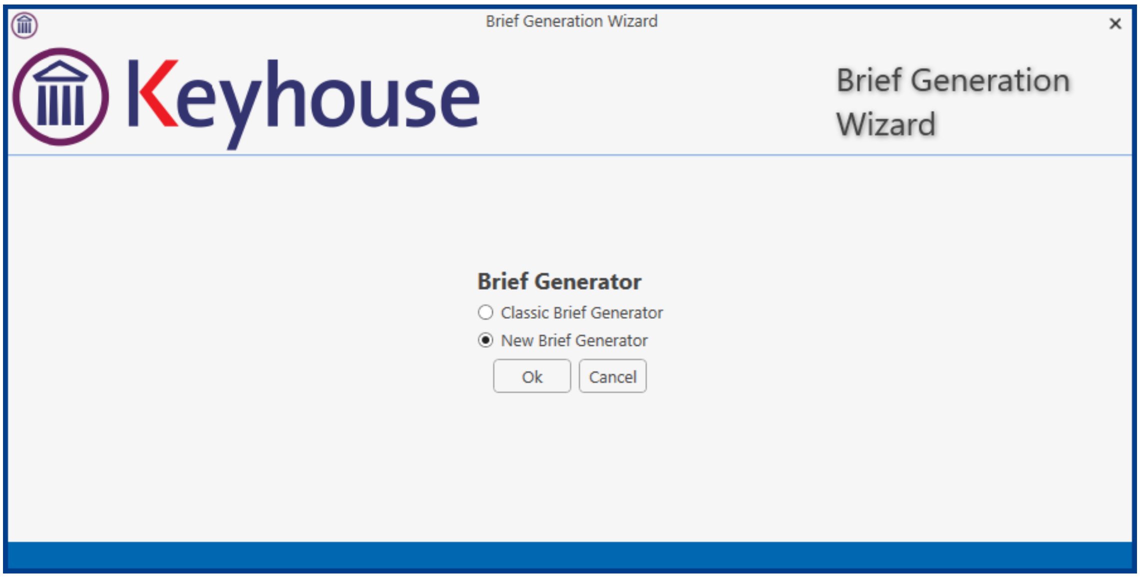
Once you begin to generate your Brief using your PC or laptop to view/use another program will slow down the generation of the brief and impact the performance of the other program.

How to (Re) Generate a Brief

How to (Re) Generate a Brief

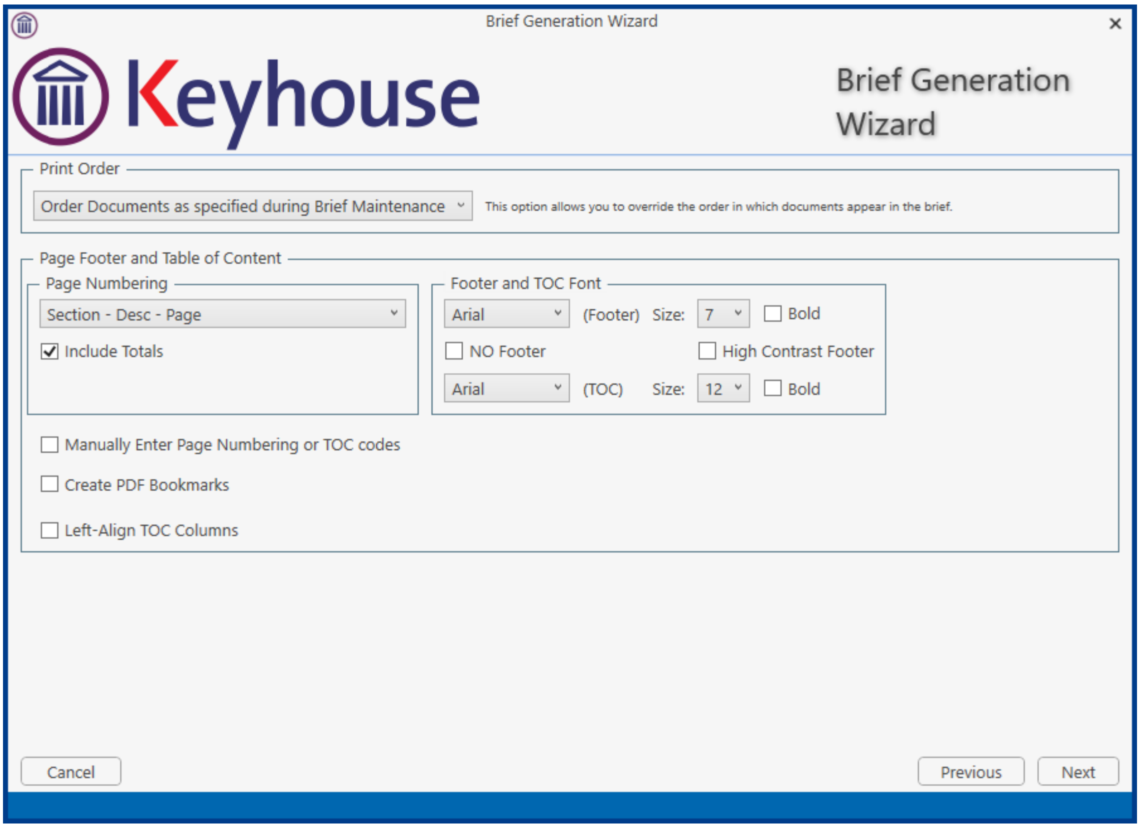
1. Click **(Re)Generate** on the Home tab.

2. Ensure the New Brief Generator is selected. The System will remember the choice and use not give the option again. However, an option can be set in the Users System Preferences to ensure the Brief Generator option is always available.

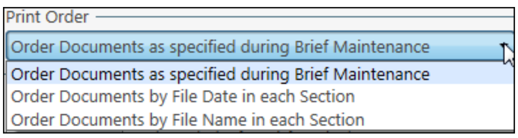


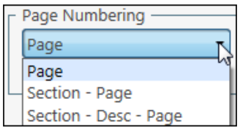
3. The Brief Generation Wizard will start.

4. When pre-processing has been completed, you will have the opportunity to set the print order of the brief, the contents and position of the footer and the alignment of columns in the table of contents.



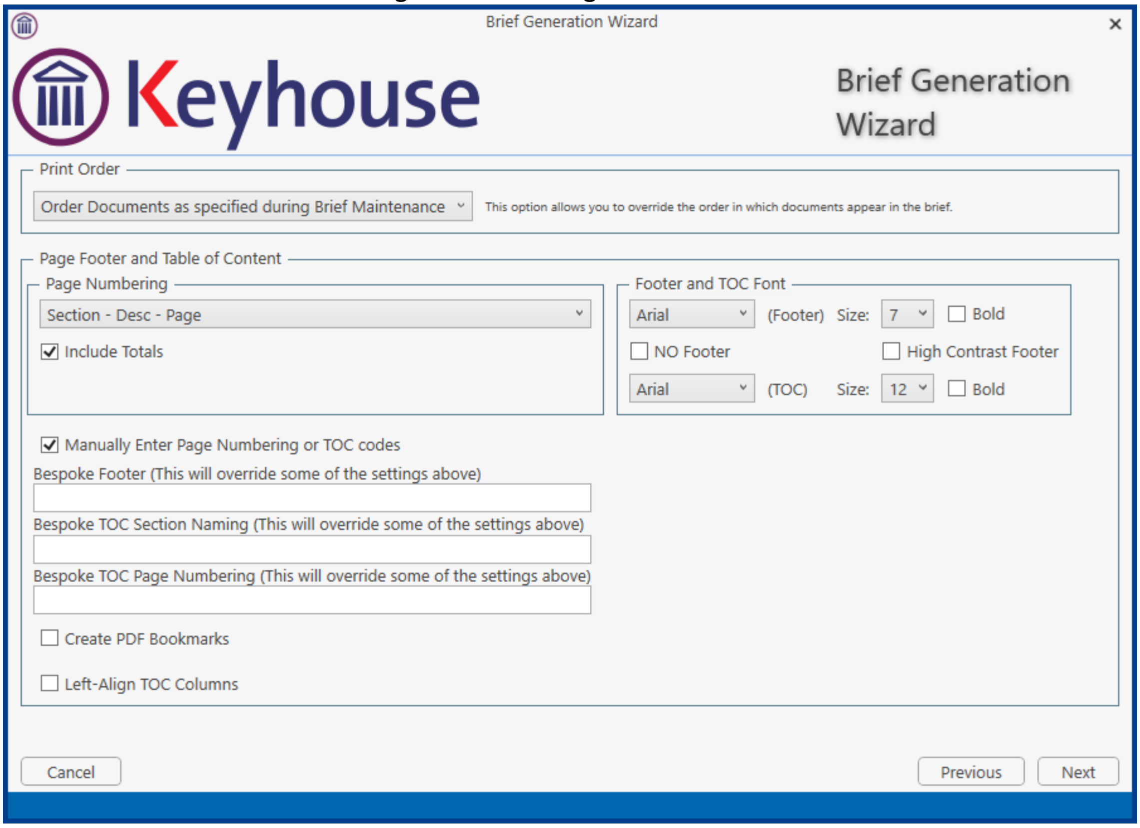
- The documents in each Section may be printed in ascending date order, in alphabetical order by filename or in the order in which they were added to the brief while it was being assembled or maintained.





- The 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 Include Totals box to include totals e.g. "Page 5 of 158".
- You can set the footer and TOC font size and weight or provide that there should be no footer
- A High Contrast Footer will make the page number easier to see.
- When 'Manually Enter Page Numbering or TOC codes' is ticked, codes can be added to allow for different Footers and TOC naming and numbering combinations.



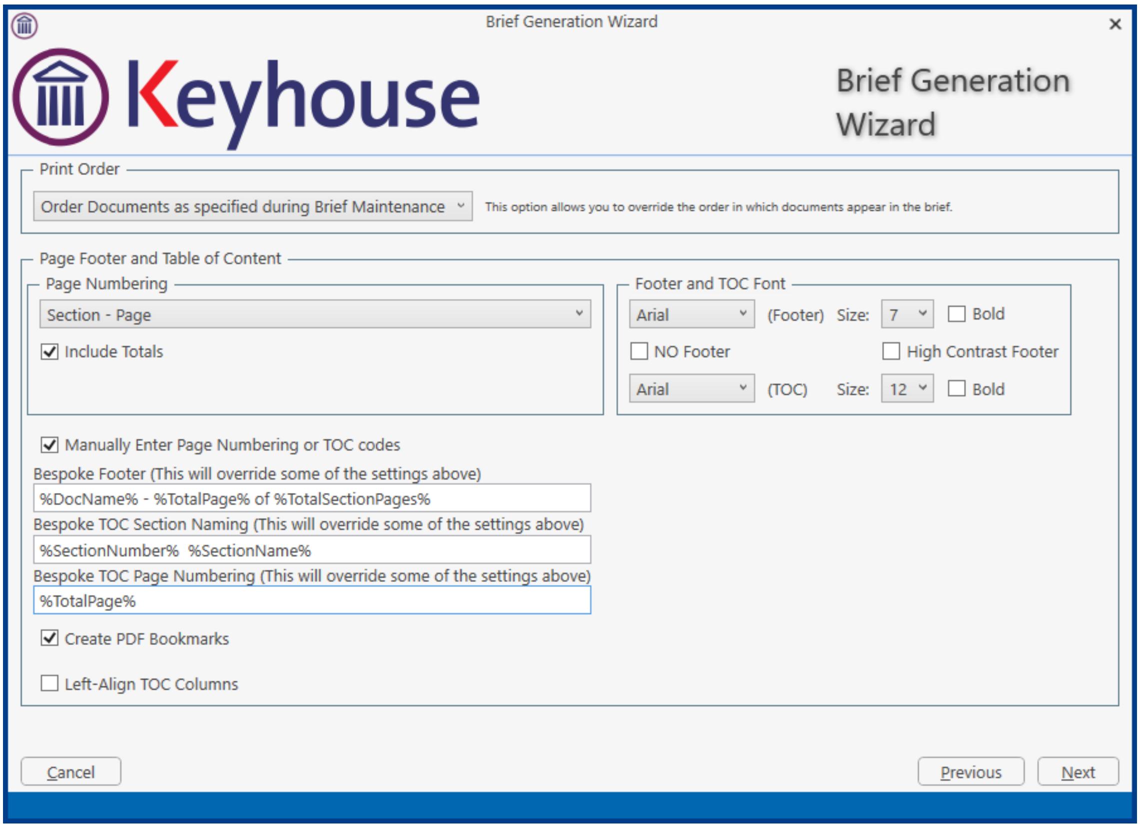
- The following options can be used individually or in combination:

%DocName%	Enters the Document Name in the footer
%TotalPage%	Enters the current page within the entire Brief
%TotalPages%	Enters the total number of pages within the entire Brief
%SectionName%	Enters the section name
%SectionNumber%	Enters the sequence number of the section (1, 2, 3, etc)
%SectionLetter%	Enters the sequence letter of a section (A, B, C, etc....)
%SectionPage%	Enters the current page within the current Section
%TotalSectionPages%	Enters the total pages in a section

%DocName% - %TotalPage% of %TotalSectionPages% will return the Document Name – 1 of 9

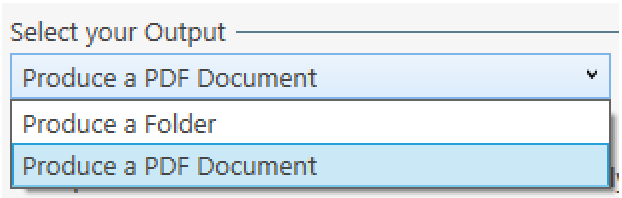
2. Create PDF Bookmarks – creates links within the Brief for easy of movement through the sections of the brief.

- 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.



5. 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**.

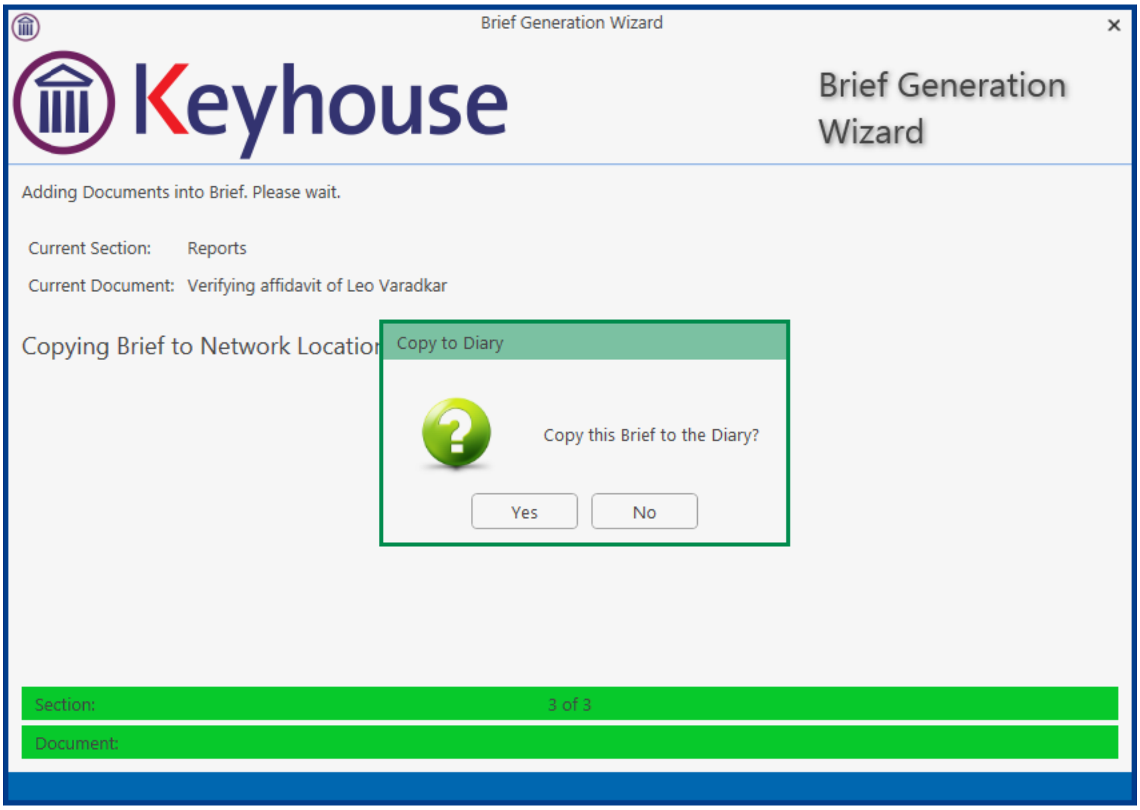
6. You will now choose the type of output. This can be as a ***PDF or a Folder***. The folder will facilitate the growing use of E-Court Documents.



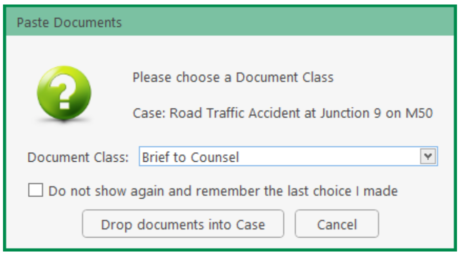
   When the Produce a Folder option is chosen, the folder will open automatically once the brief is generated. This can then be saved to a CD or Memory Stick.

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

8. Once complete, you will be given the opportunity to add the brief to the case diary

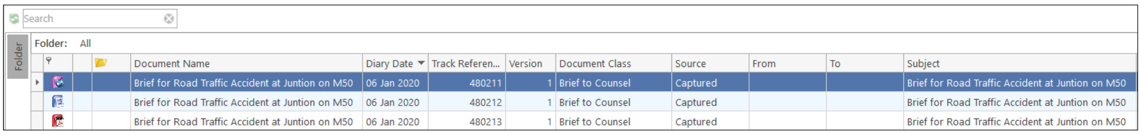


9. Click Yes to save to case diary.



10. Set the Document Class and click Drop documents into Case.

11. The 3 documents will be visible in the Document Manager and a completed action will be visible on the Case Diary.

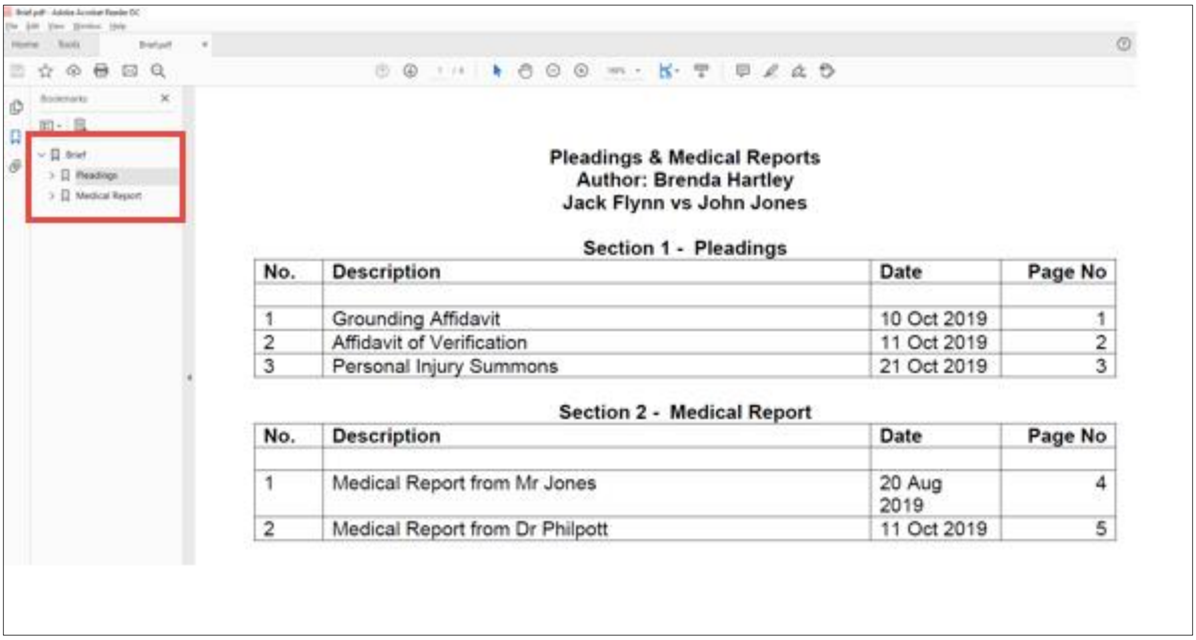


NOTE: The Word document contains only the Index

12. To print a copy, click on the document in the Attachment section of the case diary and print as normal.

Table of Contents with Bookmarks

1. From the Panel on the left, click on the section to be viewed. The Bookmark will move the user to that section of the document.



Pleadings & Medical Reports
Author: Brenda Hartley
Jack Flynn vs John Jones

Section 1 - Pleadings

No.	Description	Date	Page No
1	Grounding Affidavit	10 Oct 2019	1
2	Affidavit of Verification	11 Oct 2019	2
3	Personal Injury Summons	21 Oct 2019	3

Section 2 - Medical Report

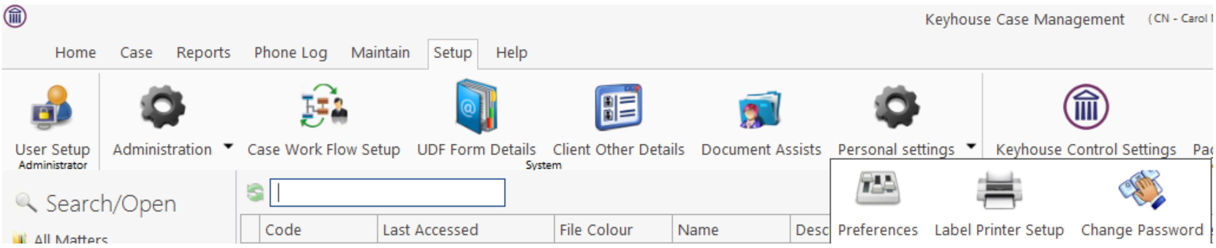
No.	Description	Date	Page No
1	Medical Report from Mr Jones	20 Aug 2019	4
2	Medical Report from Dr Philpott	11 Oct 2019	5

Chapter 19 - Setting your Preferences

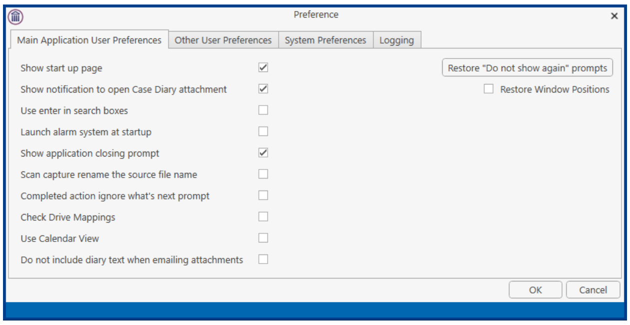
Users can set system preference on their computers. To do this:

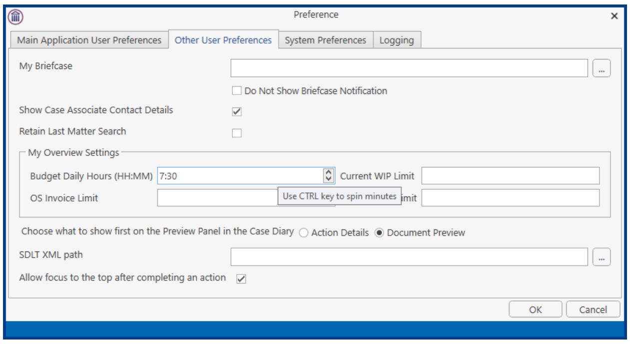
1. Go to the Setup Tab and select Personal Settings

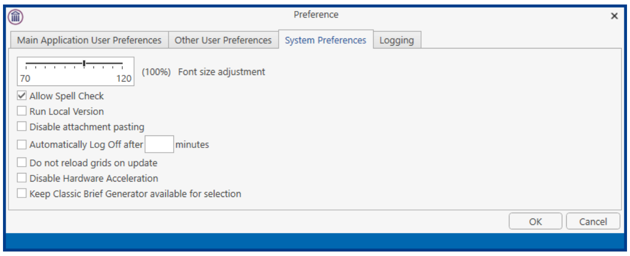
2. Select Preferences



3. The following screens will appear.







4. The options that can be set up are:

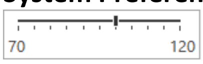
Main Application User Preferences	**The options visible on this screen may vary depending on options activated by your System Administrator.**
Show Start up Page	This will give the user the Start-up page which will allow the user to select the area of Keyhouse they wish to go to when they open the system i.e. Case/Open, Task or My Overview
Show notification to open Case Diary Attachment	When a user clicks to open an action, the system will give the action to open the document or the action.
Use Enter in Search Box	This will require the user to click Enter to start a search after the key words have been entered
Launch alarm system at setup	This option will only work if the alarm system has been turned on by the System Administrator. It can be used to set reminders on actions.

Show Application closing prompt	When the user click the X to close the system, a prompt will appear asking if the user wants to exit the system, log on as a different user or cancel.
Scan Capture rename the source file name	This will allow the user to rename a document in the scan capture folder with the name given to the document in Keyhouse.
Completed action ignore what's next prompt	When this option is ticked, follow on actions in workflow will not automatically populate in the case diary.
Check Drive Mappings	Do not tick this box unless instructed to do so by Keyhouse Support.
Do not include diary test when emailing attachments	This will prevent the action text appearing in the body of an email when it is created in the Case Diary
Restore 'Do not show again' prompts	Will restore all prompts that were previously deactivated.
Restore Window Positions	If windows have been moved and are not opening in a suitable location, this button will reposition them.

Other User Preferences

My Briefcase	Allows users to create a location outside Keyhouse for ease of exporting documents.
Show Case Associative Contact Details	This will allow the user to see any contacts within an associate on the Associates Screen on the Case/Matter
Retain Last Matter Search	To ensure that the Advanced Search screen keeps the last search entered, tick this box.
My Overview Settings	Allows the user to set their own budget in relation to time and fees
Choose what to show first on the Preview Panel in the Case Diary	Choose where to see the action or the documents when previewing the action on the Case Diary
SDLT XML path	For UK customers only.
Allow focus to the top after completing an action	To ensure that the curser stays at the top of the Case Diary when an action is completed, tick this box.

System Preferences



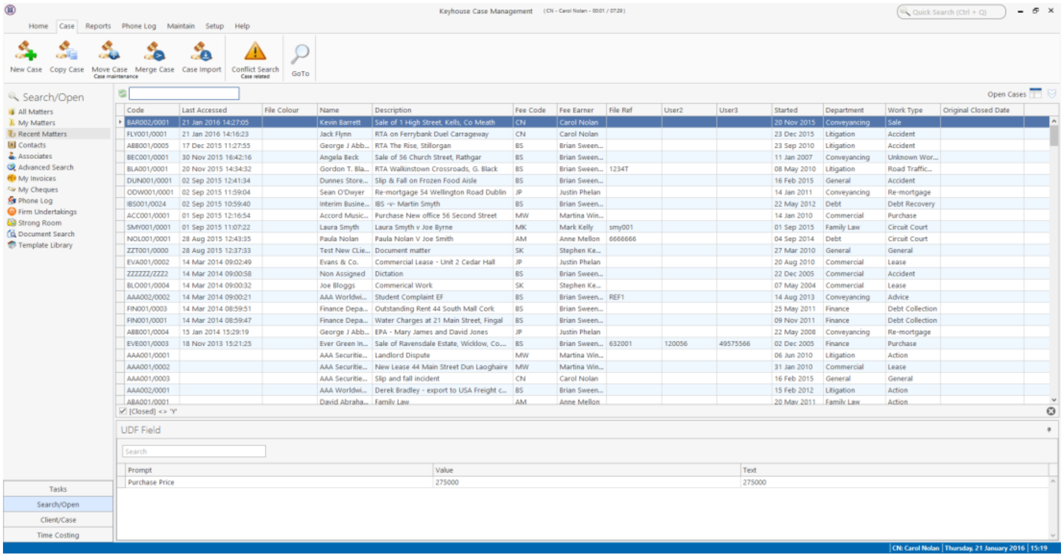
	Allows the user to adjust this size of their screen by change it to between 70% and 120%
Allow Spell Check	Ticked by default, spell check screens in Keyhouse
Run Local Version	Do not tick this box unless instructed to do so by Keyhouse Support
Disable attachment pasting	Will stop the user pasting emails into an action rather than assigning them to the case
Automatically Log Off after …	If Keyhouse is left idle for the time specified, it will revert to the log on screen. **NOTE:** This option can be set by the System Administrator and if the time set on this screen it greater than the time set by the System Administrator, the System Administrator's time is used.
Do not reload grids on update	This box may be ticked to help improve network speed issues.
Disable Hardware Acceleration	Do not tick this box without consultation with Keyhouse
Keep Classic Brief Generator available for selection	Allows the user to continue to have the option to use either the Classic Brief builder or the New Brief Generator.

Creating User Views

Keyhouse gives you the option to change the views on screens to allow you to find and see information more easily. It allows the user to create views tailored to their requirements. All new views must be saved, or they will revert to the original view when you leave the screen. View can be created where ever you see this icon. 

Creating a View

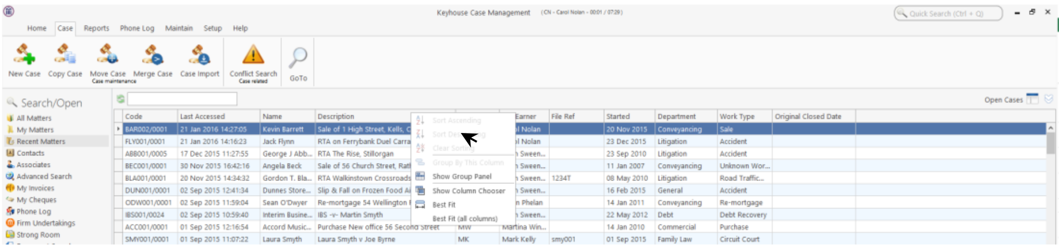
1. Go to the screen where the view is to be created



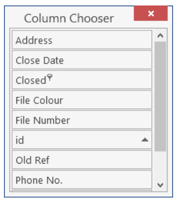
2. Make the changes to the screen:

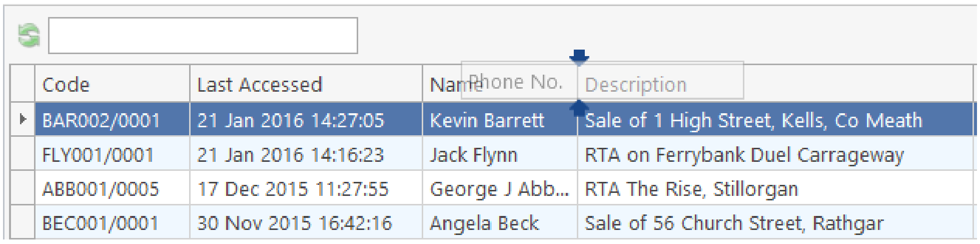
   To remove a heading no longer required, click on the heading and drag it off the Header Row.

   To add new headings right click on the Header Row and select **Show Column Chooser**. All available headings for this section are list here.



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





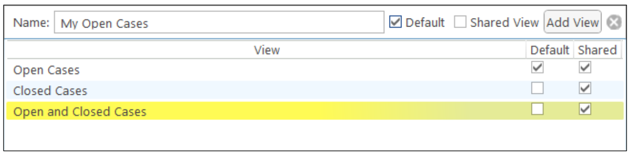
3. To reposition a column, click on the column and drag it to its required location, again using the blue arrows as a guide.

4. Once all required headings are in position, click on the view button in the top right corner of the screen.

5. Right click on **View** and click on **Add or Edit**.

6. In the Name box enter the name of the view.

7. If the view is to be the default view, click the **Default** box the select **Add View**.

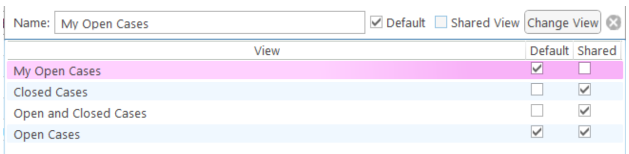


Note if you have Administration Rights you can make the view available to all users by clicking Shared View.

Note it is also possible to filter by heading and save the results as a view.

Change a View

1. Make the required changes.
2. Click on the View Icon
3. Right click on the View to be changed and select **Add or Edit**
4. Click **Change View**.



5. This will update the view for future use.

Delete a View

1. Go to the View icon and select the view to be deleted.
2. Right click on the view and select **Delete this View**.

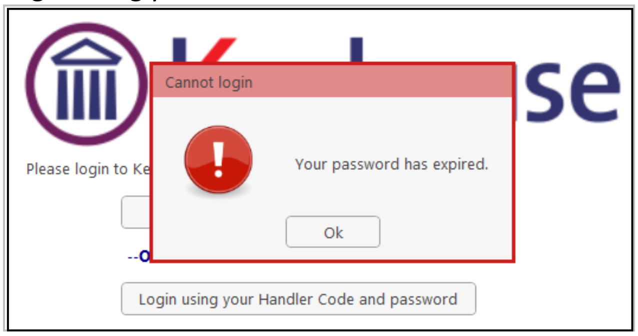
Made a View a Default View

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

Changing Your Password

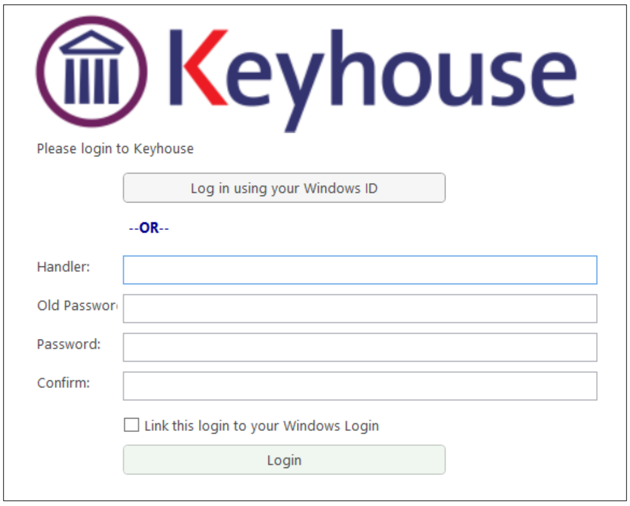
When the Password Policy is activated on the Keyhouse System, the user will be forced to change their password on a regular basis. This will be done from the Log On Screen.

1. Log in using your **normal** method

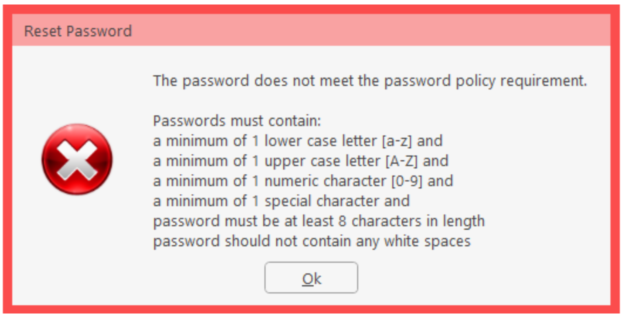


2. Click **OK**

3. Enter your **Handler ID**, **old password** and then your **new password** and link to your Windows Login if required



4. If the password does not meet the policy requirements, the following message will be displayed



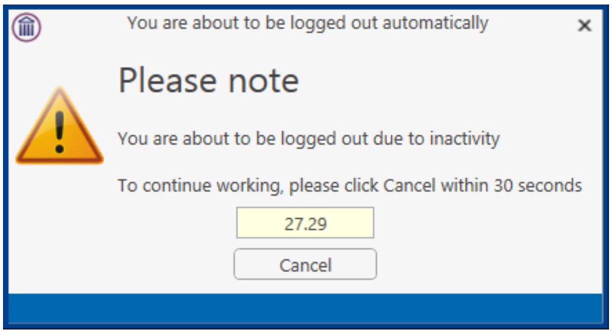
5. Re-enter the password to confirm and click OK.

6. The option to link your password to your Windows ID may be removed by your system Administrator. If this option is applied the Log On Screen will look like the image below.

NOTE: It is possible for the user to change their password from the Personal Settings on the Setup Tab using the above method.

Automatic Log Off

If the automatic log off options have been set, the user will get a 30 second warning



Click Cancel to stay logged on.

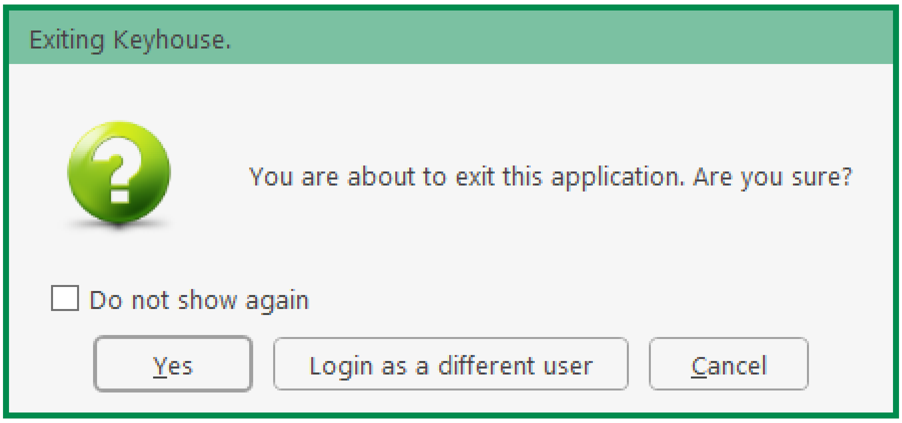
Chapter 20 – Closing Case Management

Closing Keyhouse

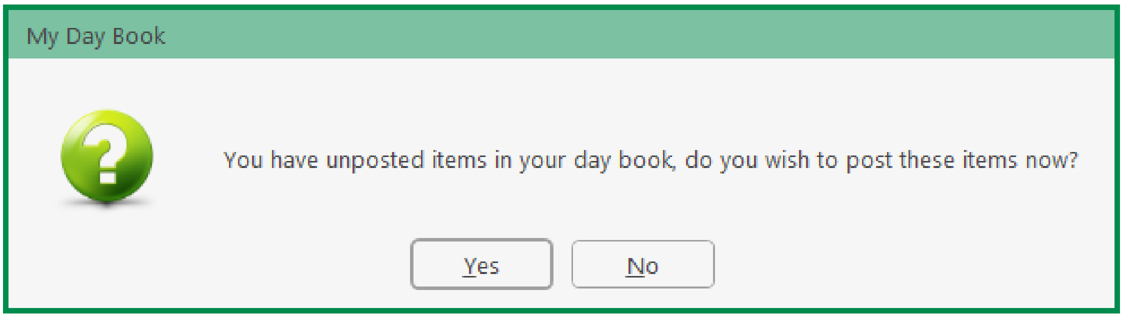
When closing the Case Management system, the options the user gets depends on the Preferences set.

1. To close the system, click on the X in the top Right Corner of the screen.

2. The following screen will appear



3. Click Yes and the following screen will appear



4. Click on the appropriate option and the system will close.

NOTE: The Exiting Keyhouse Dialog Box will only appear if the "Show application closing prompt" is selected in the Preferences.