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# 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

ij 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 <b>Advanced Search</b> to perform a more specific search on all matters.
🎨 My Invoices	Click on <b>My Invoices</b> to add, view or edit any draft invoices you have.
🧇 My Cheques	Click on <b>My Cheques</b> to add, view or edit any draft invoices you have.
🎒 Phone Log	Click on the <b>Phone Log</b> to add or view items in the phone log
🎯 Firm Undertakings	Click on Firm Undertakings to see all undertakings given or received by the organisation
🕒 Strong Room	Click on Strong Room to view or add items in your strong room.
🗟 Document Search	Click on <b>Document Search</b> to search all documents.
👦 Template Library	Click on <b>Template Library</b> to Search and preview your precedent bank of documents.

## **Chapter 1: Getting Started**

#### **Opening Case Management 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.
- 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*
- 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

## Please login to Keyhouse Log in using your Windows ID --OR--Login using your Handler Code and password

( 177	
	í) <mark>K</mark> eyhouse
Please logir	n ta Keyhause
	Log in using your Windows ID
	OR
Handler:	
Password:	
	Link this login to your Windows Login

#### **Opening Case Management from Azure**

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

Keyhouse 365 -
(iii) Keyhouse365
E-mail Address:
Password
PIN
Remember Me
Login Cancel

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.

1	Keyhouse 365		×
	Keyhous	e365	
E-ma	il Address:		
jsm	th@bloggs.ie		
Pass	word		
****	••••		
PIN			
****			
<b>√</b> F	lemember Me		
	Login Cancel		
			_

- 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.

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

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

Home Case Reports	Partners	Phone	e Log Maintain	Setup	Help				Keyhouse Case Management (CN - Carol Nolan - 00.00 / 00.00)	Quick Search (Ctrl +		- 0
🖹 🚔 🛈	Generate	Complet	8	ocup								
Tasks	Handler	Carol N	Iolan 🔽 🗹 O	utStandir	ng Only							
My Tasks	Search	1									Standard V	fiew 📃
Team tasks	C A.	. P D.	Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action	Diary Date	F
Day's tasks Next week's tasks	•								AAA Securities Ltd Landlord Dispute			• ^
Next month's tasks Overdue tasks		1	30 Mar 2016	10:21	FLY001/0001	CN	сом	CN	Jack Flynn Sale of 10 Rose Lawn, Blanchardstown, Dublin 17	Review File	30 Mar 2	P
Outstanding tasks			29 Mar 2016	09:39	ABB002/0004	CN	сом	CN	Abbie Lynch RTA The Rise, Stillorgan	Value: €100.00 , Comment: 1st Payment , Date: 22/03/2016	29 Mar 2	P
Last month's tasks			29 Mar 2016	09:39	A88001/0004	CN	сом	CN	George J Abbott EPA - Mary James and David Jones	Value: €50.00 , Comment: Last Payment , Date: 24/03/2016	29 Mar 2	P
All Tasks My Overview			29 Mar 2016	09:39	ABB001/0002	CN	сом	CN	George J Abbott Purchase 7 Church Street, Rathgar, Dublin 6	Value: €150.00 , Comment: 3rd Payment , Date: 22/03/2016	29 Mar 2	P

#### **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.

Home Case Repor	rts Phone Log Maintain Setup Help		Keyhouse Case Management (BH - Brenda	Hartley - 00:00 / 07:30 }	Quick Search (Ctrl + Q)
Print Reset Panels					
🛃 Tasks	Brenda Hartley				Wednesday, 05 Jul 201
My Tasks Team tasks	Chargeable Time This Month		4	× Performance	± ×
Days tasks Net week's tasks Net week's tasks Over due tasks Outstanding tasks Last week's tasks Last week's tasks Last worth's tasks All Tasks My Overview				My time day book Time this week Time this month Time this weat Admin time this month Admin time this year Case Information Open Matters My dormant Matters My dormant Matters No. of Effectively complete Matters No. of Effectively complete Matters	Actual Target ↑ 0.00 0000 0.00 0000 0.00 0000 0.00 0000 0.00 0000 0.00 0000 0.00 0.00 0000 0.00
Tasks Search/Open	-0.2 -0.4 Target	Houri MTD	Avg Daily Hours MTD	No. of Cases with no estimated fee No. of Cases approaching settimate fee No. of Cases approaching lockup value limit Task/Alert No. of over due tasks No. of over due tasks Critical tasks Critical tasks High priority tasks Ehone message	1 0 0 7 8 8 8 8 8 0 0 0 0 0 0 0 0 0 0 0 0
Client/Case	Chargeable Time This Month Chargeable Time Y	D. Fees Issued This Month. Fees Issued VTF		Undertakings	1.
Time Costing	Chargeable time this Month Chargeable time y	D Pees issued this Month Pees issued YTL	,		

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.

$\sim$	Dock
	Float
	Auto Hide
	Hide
	Closed panels

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

Brenda H	Aonth Fees Issued YTD. Chargeable Time YTD	
Fees issued Th	is Month Fees Issued YTD Chargeable Time YTD	
Chargeab	e Time This Month	8 X
0.5		
0.4		
0.3		
0.2		

- 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.

Brenda Hartley		Friday, 07 Jul 20
Chargeable Time This Month	-8	
15		Actual Target
		0.00 00.00
M		0.00 00.00
		030 000
44		0.00
		0.00
		×
12		
43		
		0 ×
		.0
41		
44		
40		
4		
4		
		.*

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

- Brenda Hartley Friday, 07 Jul 2017 Chargeable Time YTD Chargeable Time This Month а х Performance а × а × Actual Target ^ My time day book 0:00 00:00 0:00 00:00 Time this week 0.4 0.4 Time this month 0.00 00:00 0:00 00:00 Time this year Admin time this month 0:00 0:00 Admin time this year 0.2 0.2 **ч х** Case Information 0 Open Matters My dormant Matters No. of Effectively complete Matters No. of Cases where expected invoice date has passed No. of Cases with no estimated fee No. of Cases approaching estimate fee No. of Cases approaching lockup value limit ۰ 、 -0.2 -0.2 Task/Alert я × 0 No. of over due tasks No. of outstanding tasks Critical tasks -0.4 -0.4 Court dates High priority tasks Phone message Target YTD Hours YTD Avg Daily Hours YTD 0 ~ Undertakings Chargeable Time This M... Friday, 07 Jul 2017 **Brenda Hartley** Chargeable Time YTD Fees Issued This Month ąх ×к ąх Performance Target ^ Actual My time day book 0:00 0.3 0:00 0.4 Time this week Time this month 0:00 00:00 Time this year 0:00 00:00 Admin time this month 0:00 Admin time this year 0:00 . 0.2 Case Information я× -0.3 Open Matters 0 0 0 0 0 My dormant Matters Fees Issued No. of Effectively complete Matters Chargeable Time This Month a × No. of Cases where expected invoice date has passed No. of Cases with no estimated fee No. of Cases approaching estimate fee No. of Cases approaching lockup value limit 0 🗸 0.3 -0.3 ųΧ Task/Alert No. of over due tasks 0 0 0 0 0 No. of outstanding tasks Critical tasks -0.3 -0.4 Court dates High priority tasks Phone message Hours MTD Avg Daily Hours MTD Target YTD Hours YTD Avg Daily Hours YTD 0 ~ Chargeable Time This Month Undertakings
- 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

Performance		Ψ×
	Actual	Target
My time day book	0:00	00:00
Time this week	0:00	00:00
Time this month	0:00	00:00
Time this year	0:00	00:00
Admin time this month	0:00	
Admin time this year	0:00	
Fees this month	0	0
Fees last month	0	0
Fees year to date	0	0
Fees last year to date	0	0
<u>Fees last year</u>	0	0
Outstanding invoice	0	0
Current work in progress	0	0
Draft invoice	0	0
Outstanding fees	0	
Debtors days	0	
Outlay balance	0	
Current lockup value	0	
Performance Case Information Task/Aler	rt	

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

Home Case Reports	Phone Log Maintain Setup Help	Keyhouse Case Management (8H - Brenda Hartey - 0000 / 0000)	Quick Search (Ctrl + Q)
Print Reset Panels			
🛃 Tasks	Brenda Hartley		Friday, 07 Jul 2017
A My Tasks Team tasks			
🔟 Day's tasks	Chargeable Time YTD * *	Fees Issued This Month # *	Performance # ×
Takk Tak Tak Tak Tak Tak Tak Tak Tak Ta		Chargeable Time This Month * ×	Actual         Target           My time day, book         000         0000           Time this week         000         0000           Time this month         000         0000           Admin time this year         000         0000           Admin time this year         000         0000           Fees last month         0         0         0           Contage last sear         0         0         0           Constanding invoise         0         0         0           Constanding fees         0         0         0           Dataset sear         0         0         0           Outlag, balance         0         0         0           Current lockup value         0         0         0
Client/Case Time Costing	Target YTD Hours YTD Avg Daily Hours YTD	Chargeable Time This Month Fees Issued YTD	Performance Case Information Task/Alert

## Chapter 2: Search & Open

#### **The Search Screen**

Home Case Reports	Search Toolbar	Keyhouse Case Mana	agement (CN - Carol Nolan - 0617 / 01:13)		Quick Search (Ctrl + Q)
Vew Case Copy Case Move Ca Case maintenance Search/Open All Matters My Matters	See Merge Case Conflict Search GoTo	earch box	Fee Code Fee Earlier File	Column Headings	Open Cases 1 6 Max results: 500 t Work Type Original Closed Date
Recent Matters	Recon1/0001 113 Aug 2015 11:31:44 27001/0001 11 Aug 2015 16:37:51 Navigation Bar	Mike Breeze         Broken left leg.           Test New CLie         test           Interim Busine         International Business Services Ltd -v- D.           Jack Flym         Sale of House at: 4 The Mews, Rathfamb           Gordon T. Bla         RTA Walkinstown Crossroads, G. Black	h CN Carol Nolan FLY00 BS Brian Sween 1234	27 Mar 2010 Commercia 15 Feb 2008 Debt 11 02 Jul 2015 Conveyanci	Accident Accident Debt Collection
My Cheques Phone Log Firm Undertakings	RL IB5001/0020 10 Aug 2015 11:43:26	Jack Flynn Document matter Jack Flynn Purchase of 16 The Haywain, Terenure, Interim Busine Gary Neville - Short term Ioan	SK     Stephen Ke       CN     Carol Nolan       BS     Brian Sween	Matter	List
the pin t	k on a column head to apply a filter Fe le Colour and closed	e Earner <sup>9</sup> 🔺 . The		heading e.g. Matter Des able on Fee Code, Fee Ea	
🎾 <b>Tip</b> : To r	remove filters right-	click and then click o	on remove fil	ters	
<b>Tip</b> : The number		returned can be set.	The minimu	m number is 100 and the	e maximum

#### 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.

<u></u>					Keyhouse Case Mana
Home Case Report	s Partners Phone	e Log Maintain Setup	Help		
	e Case Merge Case	Case Import			
Case	maintenance	Case les	sted		
🔍 Search/Open					
All Matters	Code	Last Accessed	File Colour	Name	Description
My Matters	AAA001/0001	19 Apr 2016 15:37:12		AAA Securitie	Landlord Dispute
B Recent Matters	AAA001/0002			AAA Securitie	New Lease 44 Main Street Dun Laoghair
Contacts	AAA001/0003			AAA Securitie	Slip and fall incident
👗 Associates	AAA002/0001			AAA Worldwi	Derek Bradley - export to USA Freight c.
💐 Advanced Search	AAA002/0002			AAA Worldwi	Student Complaint EF
🚺 My Invoices	ABA001/0001	19 Apr 2016 17:08:36		David Abraha	Family Law
🖙 My Cheques	ABA001/0002			David Abraha	HIPS Negligence - October 2010
🖣 Phone Log	ABB001/0001			George J Abb	Sale 45 Somserset Road, Dublin 6
Firm Undertakings	ABB001/0002			George J Abb	Purchase 7 Church Street, Rathgar, Dubl
📄 Strong Room	ABB001/0004			George J Abb	EPA - Mary James and David Jones
💁 Document Search	ABB001/0006			George J Abb	Sale 7 Church Straet Rathgar
🗑 Template Library	ABB002/0001			Abbie Lynch	George J Abbott - 5 Main Street, Donn

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

							Keyhouse Case Manag	ement (CN - C		
Home Case Reports	P	hone Log Mai	ntain Setup Help	)						
🚣 🝰 🍰 🔺 🔎										
New Case Copy Case Move C Case maintenance		e Merge Case	Conflict Search	бото						
🔍 Search/Open	6	sale	8	)						
🙀 All Matters		Code	Last Accessed	-	File Colour	Name	Description	Fee Earner		
My Matters	Þ	BRO001/0001	20 Jul 2015 17:24:46			Kevin Browne	Sale of 78 Somerset Road, Ealing, Lond	Brian Sween		
Recent Matters		SIM001/0001	20 Jul 2015 17:08:19			Bart Simpson	Sale of House at: 4 The Mews, Rathfarnh	Carol Nolan		
~		FLY001/0001	20 Jul 2015 16:33:04			Jack Flynn	Sale of House at: 4 The Mews, Rathfarn	Carol Nolan		
Contacts		ACC001/0002	03 Jul 2015 10:07:32			Accord Music	Sale 123 Bishops Street	Martina Win		
Act Search	Ļ	WEI001/0001	m			James Weis	Sale 22 Nutley Lane Donnybrook Dublin 4	Carol Nolan		

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**.

١						Keyhouse Case Manag	ement (CN - C
Home Case Reports	Phor	ne Log Mair	ntain Setup Help				
New Case Copy Case Move C Case maintenance	ase	Aerge Case	Conflict Search Case related GoTo				
Search/Open	S s	sale	8				
All Matters	Со	de	Last Accessed	File Colour	Name	Description	Fee Earner
My Matters	► BR	0001/0001	20 Jul 2015 17:24:46		Kevin Browne	Sale of 78 Somerset Road, Ealing, Lond	Brian Sween
B Recent Matters	SIN	/001/0001	20 Jul 2015 17:08:19		Bart Simpson	Sale of House at: 4 The Mews, Rathfarnh	Carol Nolan
La Collacts	FL\	Y001/0001	20 Jul 2015 16:33:04	······································	Jack Elvnn	Sale of House at: 4 The Mews, Rathfarn	Carol Nolan

- 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.

		Open Cases 📃
	View	$\smile$
Open Cases		
Closed Cases		
Open and Closed Cases		

- 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.

					Keyhouse	Case Manag	ement (CN - C	Carol Nolan - 00:00 / 0	100)				
Home Case Report	s Phone Log Ma	intain Setup Help											
4 4 4	<b>\$</b>												
w Case Copy Case Move Case maintenar	e Case Merge Case	Conflict Search Case related GoTo											
Search/Open	My Contact												
Il Matters	Search												
vly Matters Recent Matters	Client Code	Name	Address				Telephone		Email				Fe
Contacts	AAA001	AAA Securities Ltd	44 Main Street Dun Laoghaire				012112112						MW
Associates Advanced Search	AAA002	AAA Worldwide Remo	South Mall Cork				021 1241241		mareynolds	@AAAworldwid	eremovals.ie		SK
My Invoices ABA001 David Abrahams			123 Mayfair Street Dublin 2					01-2902222 d.abrahar		ms@gmail.com			AM
hone Log irm Undertakings	ABB001	George J Abbott	60 Somerset Road, Ranelagh,				01-5656712		gabbott@id	ol.ie			BS
trong Room Document Search	ABB002	Abbie Lynch	14 The Mews Dublin 12				01 456789		a.lynch@ho	tmail.com			SK
emplate Library	ACC001	Accord Music World Ltd	56 Second Street Bray				01 200000						MW
	AIG001	Allied Investment Group	1 High Street, Dublin				1234567890		info@aigleg	gal.ie			BS
	AIN001	Allied Investment Netw	44 Main Street Donnybrook				6677889		andrew@ai	n.ie			BS
	Matters ( AAA	001)											
	Search												
	Case Code	File Color	Description	Fee Earner	Deptment	Worktype	Started	Case Code	Name	User1	User2	User3	Privilege
	AAA001/0001		Landlord Dispute	Martina Wint	Litigation	Action	06 Jun 2010	AAA001	AAA Securitie				
	AAA001/0002		New Lease 44 Main Street Dun	Martina Wint	Commercial	Lease	31 Jan 2010	AAA001	AAA Securitie				
$\sim$	AAA00 0003-	mar	clin and f	Volan	- dersham	meral		AAOP	AAA 9-vriti-			A	-

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".

N	/ly Contact												
	accord	ŝ	]										
	Client Code	Name	Address			-	Telephone		Email				Fe
ŀ	ACC001	Accord Music World Ltd	56 Second Street Bray										мw
Γ													
Ļ													
N	Atters ( ACC	001)											
	Search		]										
E	Case Code	File Color	Description	Fee Earner	Deptment	Worktype	Started	Case Code	Name	User1	User2	User3	Privileges
+	ACC001/0002			Martina Wint		Sale	14 Jul 2010						-1
	ACC001/0001		chase Now affice 5 aco	with	ercial	Puschase-	- LJon 20	solo	marard susic.	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

**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.

D				Keyhouse Case Management	CN - Carol Nolan - 0000 / 0000 )				🔍 Quick Search (Ctr	1 + Q) – 🗗
Home Case Repor	rts Phone Log Maintain Setup	> Help								
A Case Copy Case Mor	ka 🎄 🚣	rch GoTo								
Case maintene	Search: abrahams	GOTO								🕨 Go 🏋 Reset
🔍 Search/Open		Case Description Clier	nt Address 🗹 Code 🗹 Old	Ref 🗹 File Ref						GO Reset
All Matters	And Y Client Name:							And v	File Ref:	
My Matters Recent Matters	And * Matter Desc.:							And v	User Field 2:	
Contacts	And * Client Address:							And ~	User Field 3:	
Associates	And * Matter Code:	And V Old R	ef:					And ~	Your Ref:	
Advanced Search	And Y Fee Earner:	♥ And ♥ Dept					v	And v	WorkType:	
Wy Cheques										Max. results:
😚 Phone Log	Time Code 🔍	Name	File Colour	Client Address	Description	F/e	Team	Dep	t File Ref	Old Ref
Firm Undertakings	ABA001/0001 David	Abrahams	123 1	Mayfair Street Dublin 2	Family Law	AM	CON	FAM		
Strong Room	ABA001/0002 David	Abrahams	123.1	Mayfair Street Dublin 2	HIPS Negligence - October 2010	BS	COM	LIT		

#### Simple Search

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

#### "OR" Search

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

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

Search:	Irelan	d					
In field	ls:	✓ Client Name	Case Description	Client Address	Code	Old Ref	File Ref

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

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

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

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

Search:	
In fields: 🗹 Client Name 🗹 Case Description	on 🗹 Client Address 🗹 Code 🗹 Old Ref 🗹 File Ref
Or Y Client Name: smith	
Or Y Matter Desc.: rta	
And Y Client Address:	
And Y Matter Code:	And Y Old Ref:
And Y Fee Earner:	And V Dept:
harmon harmon	

#### "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.

Search:		
In fields:	Client Nam	e 🗹 Case Description 🗹 Client Address 🗹 Code 🗹 Old Ref 🗹 File Ref
And Y	Client Name:	Abbot
And Y	Matter Desc.:	Sale
And Y	Client Address:	Dublin
And Y	Matter Code:	And Y Old Ref:
And v	Fee Earner:	And V Dept:

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

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

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

#### Searching using a Wildcard

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

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

_									
Search	Ellis%Rathmines	$\rightarrow$							
In fie	Idc: 🗹 Client N	ame 🗹 Case De	escription 🗹 Client Addres	ss 🗹 Code 🗹 Ol	d Ref 🗹 File Ref				
And	l Y Client Name:	:						-	
And	I Y Matter Desc.								
And	l Y Client Addre	ss:							
And	I Y Matter Code	2:	And Y Old Ref:						
And	Fee Earner:		V And V Dept:						Ŷ
Tim	e Code 🔍		Name	File Colour	Client Address	Desc	ription	F/e	Team
	BLA001/0001	Gordon T. Black		23	Ellis Park Rathmines Dublin 6	RTA Walkinstown Crossroa	ads, G. Black BS		COM
	BLA001/0002	Gordon T. Black		23	Ellis Park Rathmines Dublin 6	2 Trinity Close, Rathgar, D	ublin 6 BS		COM
	BLA001/0004	Gordon T. Black		23	Ellis Park Rathmines Dublin 6	Purchase of 8 Clonattin Hil Wicklow.	lls, SK		COM
	BLA001/0007	Gordon T. Black		23	Ellis Park Rathmines Dublin 6	Rates Collection proceedir	ngs action BS		COM

**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.

Search:												🕨 Go 🏋 Re	eset 🛛 💝
In fields:	: 🗹 Client N	ame 🗹 Case Description 🗹	Client Address 🗹 Client Email 🗹 Code 🗹 Old Re	f✔ File Ref									
And N	Client Nan	ne:								And Y	File Ref:		
And `	Matter De	sc.:								And ~	User Field 2:		
And `	Client Add	iress:								And Y	User Field 2:		_
And `	Matter Co	de.:	And V Old Ref:							And Y	Your Ref:		_
And `	Fee Earne	a 🗸 🗸	And Y Dept:							Y And Y	WorkType:		~
											Max. results:	100	
Time	Code 🔍	Name	Description	Client Address	F/e	Dept	File Colour	Team	File Ref	Old Ref	User 2 Field	User 3 Field	^
FU	Y001/0001	Jack Flynn	Road Traffic Accident at Junction 9 on M50	10 Rose Lawns Blanchardstown Dublin 15	CN	LIT		COM	Brief Builder Ca				Caro
BE	C001/0005	Angela Beck	Revenue Summons	26 Church Street Rathgar Dublin 6.	SK	LIT		COM					Stepl
EV	/E001/0010	Ever Green Insurance Corpor	Company restructure	Ever Green House, Donnybrook, Dublin 4.	SK	сом		сом					Stepl
W	OM002/0001	Womack Hotels	Service Agreements	22 Ballybarn Road Swords Co Dublin	BS	COM		COM					Brian
SL	E001/0001	Slevin & Co	Lease Warehouse premises	Smithfield Industrial Estate Dunboyne Co Dublin	JP	сом		CON					Justir
QL	JI001/0006	Alan Quinn	Injunction	45 Herbert Park, Donnybrook, Dublin 4	BS	LIT		COM					Brian
LO	0W001/0003	Lowery Developments	Receivership - Nama Properties - No 3 Sandyford Es	tat 12 Main Street Ennis Co. Clare	BS	CON		COM					Brian

#### **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.

Ausointe     Ausointe	Home Case Repor	ts Phone Log Ma	intain Setup Help			Keyhouse Case Manag	gement (CN -	Carol Nolan - 00:00 /	00.00)			Quick Search (Ctrl + Q) - 5 ×
All Mutteris         Code         Last Accessed         Name         Description         Fee Earner <sup>®</sup> Started         Department         Work Type         Original Closed Date           M Mutteris         Excert Mutteris         Code         Last Accessed         Name         Department         Signal Acids and Acids and Acids and Acids and Signal Acids and Acids and Acids and Acids and Signal Acids and A	A Copy Case Mov	maintenance	Case Import Conflict	Search Corte								
My Multeri     Code     Latt Accessed     Name     Phone No.     Description     Fee Samer*     State     Department     Work Type     Original Cosed Date       IB Contarts <ul> <li>AAX0010003</li> <li>ID May 2016 100053</li> <li>AAA Secure.</li> <li>ID T12112</li> <li>Sign and Data Indicate</li> <li>Contarts</li> <li>Contarts</li> <li>ECOLONO03</li> <li>A Pay 2016 153:554</li> <li>Angela Eek</li> <li>ID T230099</li> <li>Sale of Same Type</li> <li>Carel Nation</li> <li>To Pay 2016 153:554</li> <li>Angela Eek</li> <li>ID T230099</li> <li>Sale of Same Type</li> <li>Carel Nation</li> <li>To Pay 2016 153:554</li> <li>Angela Eek</li> <li>ID T230099</li> <li>Sale of Same Type</li> <li>Carel Nation</li> <li>To Pay 2016 153:554</li> <li>Angela Eek</li> <li>ID T230099</li> <li>Sale of Same Type</li> <li>Carel Nation</li> <li>To Pay 2016 153:554</li> <li>Angela Eek</li> <li>ID T230099</li> <li>Sale of Same Type</li> <li>Carel Nation</li> <li>ID Sage 2003</li> <li>Contary 2016 10000</li> <li>Carel Nation</li> <li>ID Sage 2003</li> <li>Contary 2016 10000</li> <li>Carel Nation</li> <li>ID Sage 2003</li> <li>Carel Nation</li> <li>ID Sage 2004 2010</li> <li>Comparison</li> <li>Sale of Same Type and Type and</li></ul>		Landler Car	ol Nolan	·								
Tencent Muttern         Code         Last Accessed         Name         Name         Name         Description         Fe Earrer         Started         Departuret         Work Type         Original Cosed Date           & Contacts         ************************************		5										My Open View 📃 🗧
Kerkett Middrift         9         AAAAO00003         Id May 2016 100053         AAAA Searche.         D213112         Step and all indicate         Caref Value         Identity         Centers         Center	My Matters	Cada	Last Accessed	Name	Dhone No.	Description	Fee Former?	Started	Department	Work Turne	Original Classed Date	
Contact         ECC010002         Angle Beck         01/33999         23 HB Street, Bray, Co Wicklow         Carol Nolan         01 Feb 2007         Commercial         Advice           Advacced Search         64001/0003         27 Apr 2016 15:35:4         Angle Beck         01/339999         23 HB Street, Bray, Co Wicklow         Carol Nolan         01 Feb 2007         Commercial         Advice           My Wincles         640001/0003         27 Apr 2016 15:35:4         Angle Beck         01/339999         Sale of 3 Mus Street, Bray, Co Wicklow         Carol Nolan         01 Feb 2007         Commercial         Advice           Wy Minocles         640001/0003         20 Apr 2016 15:35:4         Angle Beck         01/339999         Sale of 3 Mus Street, Bray, Co Wicklow         Carol Nolan         01 Feb 2007         Commercial         Advice           Wy Minocles         64000/0003         Dabid Bioggo         01-477777         Sale 4 Shifts Road, Tipperary         Carol Nolan         02 A2000         Comyancial         Sale	Recent Matters										Original closed bate	
Absolute         Store         Care Nation         Store         Store         Store           Advanced Samo         ExCOV.000         24 p2 016 153:554         Angelia Beck         B1-23999         Sale of Samo         Care Netal         Do No         Conveyancing         Sale	Contacts		04 May 2016 10:08:55									
Animatics         BL0001/0005         See Bloggs         01-676/981         Advice File         Carol Nolan         10 Sep 2005         Ubgation         Advice           My Innoices         BL0001/0005         David Bloggs         01-676/981         Advice File         Carol Nolan         10 Sep 2005         Ubgation         Advice           My Innoices         BL0001/0005         David Bloggs         01-676/981         Advice File         Carol Nolan         10 Sep 2005         Ubgation         Advice           My Innoices         BL0001/0001         David Bloggs         D1-676/981         Advice Tile         Carol Nolan         10 Sep 2005         Ubgation         Advice           File Mone Log         BL0001/0001         Carel Nolan         10 Sep 2005         Ubgation         Advice           File Mone Log         BL0001/0001         Carel Nolan         10 Sep 2005         Ubgation         Advice           File Mone Log         DL00010001         Ammes Deame         Of remotal lipsing rating the rate, File Sep 2005         Carel Nolan         10 Agr 2005         Converyancing         Park           Brong Room         DL000010002         Ammes Deame         01 FiltTrate Filt Res         Carel Nolan         03 Agr 2005         Converyancing         Park as           Brong Room	Associates											
Window         BL0002/0003         Devid Biogs         Call - 97777         Sale 4 - 84 (list Road, Tipperary         Carol Nolan         C 202 r2010         Compression         Sale         Sale 4 - 94 (list Road, Tipperary         Carol Nolan         C 202 r2010         Compression         Sale         Sale 4 - 94 (list Road, Tipperary         Carol Nolan         C 202 r2010         Compression         Sale         Sale         Sale 5 - 98 (list Road, Tipperary         Carol Nolan         12 Jan 2011         Ubipation         Advice           Prim Undertabling         CU000/0001         Am Marie CuL         Credit Card Debid         Carol Nolan         14 Jan 2011         Ubipation         Advice           Boround Station         DisAd01/0003         Amso Deame         01 of 177777         Purchase & Buindigon Terrace, Bray         Carol Nolan         14 Jan 2011         Ubipation         Advice           Boround Station         DisAd01/0003         Amso Deame         01 of 177777         Purchase & Buindigon Terrace, Bray         Carol Nolan         14 Jan 2014         Debt         De	Advanced Search	BEC001/0003	27 Apr 2016 15:35:54	Angela Beck	01-2339999	Sale of 3 Main Street, Bray.	Carol Nolan	02 Jun 2007	Conveyancing	Sale		
July Capaging         BL0002/0003         David Bloggs         Call A 37777         Sale 4 54 line Read, Tipperary         Carl Nale         Carl Nale         Contraining         Sale         Sale         Sale Read, Tipperary         Carl Nale         Carl Nale         Contraining         Sale         Sale         Sale Read, Tipperary         Carl Nale         Carl Nale         Contraining         Sale	My Invoices	BLO001/0005		Joe Bloggs	01-6767981	Advice File	Carol Nolan	10 Sep 2005	Litigation	Advice		
Phone Log         50/0007/0001         Claire Bounk         01 2040020         Personal Injury at work         Carol Nolin         14 Jan 2011         Litigation         Advice           Frem Understahlings         C L0007/0001         Am Marie Cul.         Credit Carol Debit         Carol Nolin         14 Jan 2011         Litigation         Advice           Strong Room         DEA/00003         Ams Seame         01677777         Pershave 3 Berlington Terrace, Bray         Carol Nolin         14 Jan 2011         Debt         Debt Collection           Document Search         D         Duc0001/0002         Ams Deame         01677777         Pershave 3 Berlington Terrace, Bray         Carol Nolin         03 Apro2052         Conversions           Document Search         Duc0001/0002         Paul Duggan         064 78901         Separation Amagement         Carol Nolin         20 Aug 2010         Family Law         Separation Amagement		BLO002/0003		David Bloggs	021-4577777	Sale 45 Hills Road, Tipperary	Carol Nolan	02 Oct 2010	Conveyancing	Sale		
Offent Unclearings         CUL0010001         Arm Marie CuL.         Credit Card Pable         Card Nolin         14 Jan 2011         Debt Collection           Btrong Room         DE4001/0003         James Deame         01 6777777         Perdase 3 Burington Terze, tray         Carol Nolin         03 Apr 2005         Conveysnocing         Parchase           Quorument Savering         DUGOD/0002         Paul Doggan         04 719701         Separation Arrangement         Carol Nolin         20 Agr 2001         Femalu Law Separation Arrangement		BOU001/0001		Claire Bourke	01 2040020	Personal Injury at work	Carol Nolan	14 Jan 2011	Litigation	Advice		
Strong Room         DEA001,0003         James Deane         01 677777         Purchase 3 Burlington Terrace, Bray         Carol Nolan         03 Apr 2005         Conveyancing         Purchase           Document Search         DUG001,0002         Paul Duggan         064 78901         Separation Arrangement.         Carol Nolan         02 Aug 2010         Family Law         Separation A		CUL001/0001		Ann Marie Cul		Credit Card Debit	Carol Nolan	14 Jan 2011	Debt	Debt Collection		
2 Document Search DUG001/0002 Paul Duggan 064 78901 Separation Arrangement Carol Nolan 20 Aug 2010 Family Law Separation A				James Deane	01 6777777	Purchase 3 Burlington Terrace, Bray	Carol Nolan		Conveyancing	Purchase		
HAR001/0001 27 Apr 2016 15:36:03 Brenda Hartley 01-290 2222 Sale of 1 High Street, Lucan, Co Dublin Carol Nolan 27 Apr 2016 Conveyancing Sale	p remplate clonary		27.4 2016 15-26-02									

#### **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
Þ	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 biury at work	CN	Car <u>ol No</u> lan

#### How to Filter Columns

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

Home Case Repor	ts Phone Log Ma	intain Setup Help	,		Keyhouse Case Manag	jemer	nt (CN-	Carol Nolan - 00:00	/ 00:00 )		
	e Case Merge Case maintenance		ict Search GoTo								
🔍 Search/Open	8										
J All Matters	Code	Last Accessed	Name	Phone No.	Description	Fee	Earner	Started	Department	Work	Туре
Ky Matters	► ZZZZZZ/ZZZZ		Non Assigned		Phone Message	II.		Clear Filter (	All Handlers)		
🐌 Recent Matters	BEC001/0001		Angela Beck	01-2339999	Sale of 56 Church Street, Rathgar						wn Wor.
Contacts	MOO001/0001		Mrs M D Mo	01372 210242	Sale of : 73 Broadhurst Ashtead Surrey K		earch				wn Wor.
👗 Associates	ABB001/0001		George J Abb	01-5656712	Sale 45 Somserset Road, Dublin 6		Code	Name			wn Wor.
🂐 Advanced Search	ONE001/0003		O'Neil Flynn	01-6766555	Una Murray of 78 Dodder Park, Churcht		coue	All hand	llors		akings
🌕 My Invoices	ONE001/0001		O'Neil Flynn	01-6766555	56 Glengara Park, Dundrum, Dublin 14	Ľ,	ADM	Admin	ners		akings
My Cheques	EVA001/0001		Evans & Co.	01-4566777	78 Hillcourt Park, Dun Laoghaire, County		AM	Anne M	allon		akings
😚 Phone Log	TAR001/0002		George Tarrant	2455555	Separation		BS	Brian Sv			ition A
Firm Undertakings	DUG001/0002		Paul Duggan	064 78901	Separation Arrangement		CN	Carol N	,		ition A
Strong Room	WEI001/0001		James Weis	01-6777777	Sale 22 Nutley Lane Donnybrook Dublin 4		JP	Justin P			
🗟 Document Search	WAL001/0001		Margaret Wal	66556565656	Sale 4 Main Street, Cork		MK	Mark K			
🗑 Template Library	RYA021/0002		John Ryan	89999999	Sale - 55 Main Street, Bray		MW		Winters		
	RYA002/0002		Margaret Ryan	0404 78920	Sale of no. 2 Main St Bray		SK	Stepher			
	REG001/0003		Andrew Regis	01 4355666	Sale 19 Green Court, Bray, Co. Wicklow		in Phelan		Conveyancing	sale	

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

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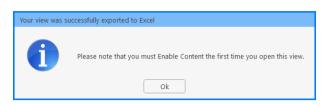
- 1. Click on the drop-down arrow to choose or change the view
- 2. Click in the Search Box to refine the search.

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BLA001/0007	Rates Collection proceedings action	Brian Sweeney	Litigation		
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All Cases C	) Open Cases 🔿 Closed Cases				🛐 Export To Excel

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

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



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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:

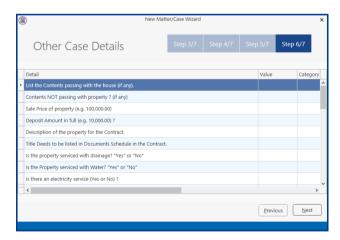
- Fee Earner handling the matter
- Department (e.g. Conveyancing, Litigation)
- Case Plan (i.e. workflow)
- Secretary the person working on the case
- The *Partner* with responsibility for the matter
- Work Type the workflow to be used
- Branch will indicate if branch of the firm.
- 10. Click **Next**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

١	New Mat	ter/Case Wizard				×
Enter N	latter Description		Step 2/7	Step 3/7	Step 4/7	
You must enter a	description for the matter					
Client Name	Kevin Barrett					
Description *	Type the description for the matter. ex. Joe Bloggs vs. John Smith. Purchase of main street Dublin.					
Fee Earner *	Select fee earner	Partner *	Select par	tner	~	
Department *	Select department	Work Type *	Select wo	rk type	*	
Case Plan *	Select case plan	Branch	Select bra	nch	×x	
Secretary	Select secretary					
				Previ	ous <u>N</u> ext	

٦		New Matter/Ca	ise					×
Ref. and	d Estimate Fee	Step 1/7	Step a	2/7	Step 3/7	Step 4/7	Step 5/7	7
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Your Ref	Enter Your Ref		REF 2	Enter	r REF 2			
REF 3	Enter REF 3							
File Colour	Select file colour	~						
Fee Amount	0.00							
Expected Bill Date	Enter expected date	~						
Fee Type	Select fee type	~						
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Completing Add Client / Matter Wizard

#### section, Copy Matter Details for more information. Click finish to create new Matter 14. Click Finish. The matter has now been created and is available in the Case Diary. **Copy Case Details** \$ Previous Einish 1. Click on the **Copy Case tool Copy Case** located on Copy Case/Matter Wizard the Case tab of the Ribbon to open the Copy Case/Matter Wizard, which starts with a Copy Case/Matter Wizard 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.

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

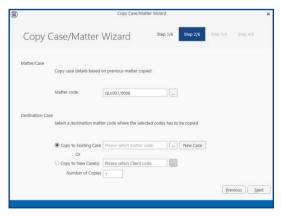
This will bring up a matter list which may be searched as described in Chapter 2.

If you choose to copy details from another

matter, a new wizard will start. See the next

- 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.

ious <u>N</u>ext



	Matter code	QUI001/0008
Destination Case		er code where the selected codes has to be copied
	<ul> <li>Copy to Existing Case</li> <li>Or</li> </ul>	Please select matter code
	<ul> <li>Copy to New Case(s)</li> <li>Number of Copies</li> </ul>	

28

- 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.
- 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.

			Drag a column header here	to group by th	at column			
	Group	Detail		Value				
V		"I" if si	ngle or "we" if joint ?	I				
V	1	"my" if	f the client is single else ".	my				
		Estima	ted Date of Closing.	15th Ma	rch 2009			
¥	1	Folio N	lumber ?	98659				
		Townl						
2			County ?	County I	Dublin			
			f Contract	N/A				
4			ccount Number ?	1258745	AE			
			e of Sale Price ?	587,000				
E			d Valuation of Househol property the Vendor's Fa.					
2			ere been any unauthoris.					
			on of Lease term.	N/A				
0				latter Wizard	Step 2/6	Step	Previous	Next
	Сору	Case/Ma	atter Wizard		• •		3/6 St	ep 4/6
			atter Wizard	latter Wizard	Step 2/6	Step		
	Сору	Case/Ma	Address 6 Upper Fitzwilliam		• •	Email	3/6 St	ep 4/6
	Copy Type Auctio	Case/Ma Name/Com	Address 6 Upper Fitzwilliam Street Dublin 2 5 Main Street	Phone		Email	3/6 Sto CaseC	ep 4/6
	Copy Type Auctio	Case/Ma Name/Com Kelly Proper	Address 6 Upper Fitzwilliam Street Dublin 2 5 Main Street Kilkenny Co. Kilkenny County Buildings Wicklow.	Phone 763534		Email	3/6 Sto CaseC BAR00	ep 4/6
	Copy Type Auctio Local A	Case/Ma Name/Com Kelly Proper Kilkenny (Ba	Address 6 Upper Fitzwilliam Street Dublin 2 5 Main Street Kilkenny Co. Kilkenny County Buildings Wicklow. 66 Fleet Street,	Phone           763534           042 67		Email	3/6 Sto CaseC BAR00 BAR00	ep 4/6

	(	Copy Ca	se/Matte	er Wizard Step 3/6 Step 4/6 St	tep 5/6
		Action Date	Action Code	Description	Action ID
		22 Dec 2011	507	Handle Pre-contract enquiries.	1524
		07 Dec 2011	EMI	See attached Proposal Document from the SFA. Could yo	1445
		24 Nov 2011	\$99	Review Undertakings to be Discharged	858
		16 Nov 2011	506	Seek Copy Folio	1357
		12 Oct 2011		Phone message from Tony. Please call back on 087 25356	1332
	$\checkmark$	04 Oct 2011	G02	Letter to Client	788
		07 Jul 2011	505	Do Contracts, Requisitions & Family Home Dec.	1177
		30 Mar 2010	521	Ltr - Client re Statement of Account.	455
	$\checkmark$	10 Mar 2010	518	Pre-Closing: Unusual Matters	454
		28 Feb 2010	513	Do Redeemption Figs. & Prepare Closing Documents	453
		22 Feb 2010	510	Chase Ltr to Purchaser's Solr re Contract	452
I	$\checkmark$	14 Feb 2010	507	Handle Pre-contract enquiries.	451
		14 Feb 2010	505	Do Contracts, Requisitions & Family Home Dec.	450
		13 Jan 2010	501	Initial Sale Letter & Instructions to Client	449

- 16. Click **Next** to continue to the final screen.
- 17. If you check the **checkbox**, details of the fields, Case Associates and actions which were copied, will be saved so that they will be selected by default the next time this source matter is copies. The final screen also provides a summary of the numbers of items copied.
- 18. Click **Finish** to close the wizard. The copied details are now included in the destination case.

1	Copy Case/Matter Wi	zard		×
Copy Case/Matte	r Wizard	Step 4/6	Step 5/6	
Completing Copy Case/N	latter Wizard			
You have successfully	Completed Copy Case/Ma	tter Wizard		
Ø Save selection for the selection of the selection for the se	he next copy of this case pl	an		
Case Fields Copied	5			
Case Associate Copied	3			
Case Diary Copied	4			
			Previo	ous Finish

 $\blacksquare$  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.

a a a		ne Log Mainta	in Setu	p Help		Keynouse Case Manager	ment (CN - Carol Nolan - 00:00 / 00:00)		Quick Search (Ctrl + Q) – • ×
New Case Copy Case Move Case Copy Case Move Case	ase Merge Case	Case Import	Conflict Case re	Search d	р <sub>Goto</sub>				
Client/Case	Case: ABA001/00	101	< Þ -	David Ab Family La					Tel: 01-2902222 F/e: BS
Case Diary Document Manager	Search							Standard View	Preview #
Current Client Details				-1					
Gurrent Case Details	C A P	D., A., Date		Time 14:59	Handler	Synopsis Letter to Solicitor re Pleading		Action Co F	
Extra Case Details	■ 0 1	27 Jun	_	14:59	MW	Undertaking changed by BRIANS		ADMUD P	Preview Document
Associates Critical Information	<b>S</b>	27 Jun 19 Jun		11:41	BS	Invoice No:230		DB01 P	? ABA001/0001/BS/GCU
Know Your Client		19 Jun		16:32	85 85	Letter from Accountant		626 P	
<sup>2</sup> Linked Cases		01 Ma		23:54	BS	Invoice No:229		DB01	04 May 2016
A/c Ledger	C 🗢	₽ 01 Ma		22:29	BS	Email Fromkeyhousedemo@gmail.com - Mobile Call t	o Brian Sweeney	EMI P	
Time Ledger	<b>S</b>	F 01 Ma		12:30	BS	Email Frombrian@keyhouse.ie - Practice Management		EMI P	
Debt Ledger	6 2	i 01 Ma		00:00	BS	Email To: - Financial Trends for the Economy	neren Agenoa	EMI P	DX 891 Dublin 2 Allsop & BrownePRIVATE
Reserve Ledger	5 3	27 Feb		09:01	BS	David Abrahams		PHE P	Solicitors
Undertakings	6 0	1 27 Feb		07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for	Key Performance Indicators	EMI P	2 Baggott Street
Strong Room	6	¥ 16 Jul ;		15:54	BS	Letter to Solicitor re title Letter to Allsop & Browne	N	603 P	Dublin 2.
	6 0	# 09 Ma		08:47	BS	Accountants Letter		G13 P	
	6 6	17 Apr		11:24	BS	Brian		P	
	5			10:27	BS	Email To: - Copy Land Folio	$\sim$	EMI P	
	5 5	21 Ma		08:43	BS	David	·	PHO P	Re: Our Client: David Abrahams
	0 0	12 Feb		22:29	BS	Innovation Ad	Case Diary showing	G13 P	Your Client: Paul Smith
	6	# 18 Dec		18:08	BS	Letter to Solicitor re Financial Statement Letter to Alls	Case Diary showing	G03 P	
	5 😞	# 16 No		09:11	BS	Email From:"Martina Winters" <martina@keyhousede< td=""><td>1) Tack completed</td><td>EMI P</td><td>Dear Sirs,</td></martina@keyhousede<>	1) Tack completed	EMI P	Dear Sirs,
	0	# 15 No	2012	14:57	BS	Letter to Solicitor re Proceedings Letter to Peter D. J	<ol> <li>Task completed</li> </ol>	G03 P	(
	5 🔶	# 15 Not	2012	09:53	BS	Email To: - Draft Reseller Agreement		EMI P	Documer
	5 3	15 No	2012	09:03	BS	Phone Call - Advised Client on Court process	<ol><li>Future Tasks</li></ol>	PHE P	
	<b>S</b>	# 05 Oct	2012	11:36	BS	Letter to Solicitor re title Letter to Peter D. Jones & C	,	G03 P	
	<i>.</i> . •	35.04	2011	16:05	DC .	David thands			Yours faithfully Preview
	Attachm	ents Search							
Tasks	Type D						Version Date Document Class	Document	s
	) 🖪 L	etter to Solicitor	re Pleadin	1g			1 04 May 2016 Letters/Interparty Correspondanc	Document	Ŭ ∣
Search/Open Client/Case								Generated	~
Time Costing							~	30	
nine costing									Oh: Carol Nolan   Wednesday, 04 May 2016   14:59

#### 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.

Client/Case	Case	e: AB/	<b>\001</b> ,	0001	1		<▶.	David Ab Family La				fel: 01-290 iol: AM
Case Diary Document Manager	Othe	r Part	y Ba	nrbar	a Ab	raha	ims			iManage Code 556471 Record No: 0		
Current Client Details	WA	RNING	i : Tir	ne to	o recl	heck	the Anti Mone	ey Laundering	for this Clie	£.	Ignore	Show
Current Case Details Extra Case Details		<b>S</b> 5	eard	1							Standard View	v + 🔲
ssociates	Act					D	ate	Time	Handler	Synopsis •	Action Co.	
itical Information ow Your Client	ion	Ħ	0	1		2	7 Jun 2014	11:19	MW	Undertaking changed by BRIANS	ADMUD	P
		•				19	9 Jun 2014	11:41	BS	Invoice No:230	D801	P
c Ledger		3			1	F 19	9 May 2014	16:32	BS	Letter from Accountant	G26	P
he Ledger bt Ledger		•				0	1 May 2014	23:54	BS	Invoice No:229	D801	P
erve Ledger		3			1	F 0	1 May 2014	22:29	BS	Email Fromskeyhousedemo@gmail.com - Mobile Call to Brian Sweeney	EMI	P
dertakings		3			1	0	1 May 2014	12:30	BS	Email From:brian@keyhouse.ie - Practice Management Review Agenda	EMI	P
		•	2		1		1 May 2014	00:00		Email To: - Financial Trends for the Economy	EMI	1
ong Room		•	C			2	7 Feb 2014	09:01	BS	David Abrahams	PHE	P
		•			1	2	7 Feb 2014	07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for Key Performance Indicators	EMI	P

#### **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.

case.	BA001/	0001		4 >							Tel: 01-290222 F/e: BS
					ranny c	211					170.00
5	Search							Standard	View 📃	Preview	4
Ad C.	. A P	D	A	Date	Time	Handler	Synopsis	Action Co.	F	Letter to Solicitor re Pleading	
9				04 May 2016	14:59	CN	Letter to Solicitor re Pleading	G03	P ^	Preview Document	
	0	1		27 Jun 2014	11:19	MW	Undertaking changed by BRIANS	ADMUD	P	10 1001 0001 00	GCU
•				19 Jun 2014	11:41	BS	Invoice No:230	DB01	P	ABA001/0001/B	GCU
			÷.	19 May 2014	16:32	BS	Letter from Accountant	G26	P		
•				01 May 2014	23:54	BS	Invoice No:229	D601	P	04 May 2016	
•	۵		÷.	01 May 2014	22:29	BS	Email From:keyhousedemo@gmail.com - Mobile Call to Brian Sweeney	EMI	P		
•	<u>ڪ</u>		÷.	01 May 2014	12:30	BS	Email From:brian@keyhouse.ie - Practice Management Review Agenda	EMI	P	DX 891 Dublin 2	
	۵		÷.	01 May 2014	00:00	BS	Email To: - Financial Trends for the Economy	EMI	P	Allsop & BrownePRIVATE	
•	C			27 Feb 2014	09:01	BS	David Abrahams	PHE	P	Solicitors	
	۲		÷	27 Feb 2014	07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for Key Performance Indicators	EMI	P		
			ł.	16 Jul 2013	15:54	BS	Letter to Solicitor re title Letter to Allsop & Browne	G03	P	Lououn 2.	
	Action	Action			C         A         P         D         A         Date           H         I	Image: Second	No         L         A,         D. A,         Dute         Time         Handler           H         0         0         0.4X/2016         14-50         CK           H         0         1         0.4X/2016         14-50         CK           H         0         1         0.4X/2016         14-50         CK           G         0         19.0X/2014         12-52         ES         G         0         0.1M/2014         22-29         ES         G         0         10.1M/2014         22-29         ES         G         0         10.1M/2014         13-0         ES         G         0         10.1M/2014         13-0         ES         G         0         10.1M/2014         13-0         ES         G         0         1         0.1M/2014         0.00         ES         G         0         1         1         1         1         1         1	Image: Second biology         Image: Second biology         Time         Handler         Symposis           Image: Second biology           Image: Second biology	© percht         Standard           Operating         Operating         Standard         Addon Co.           Mill         I         O Advagable         Other tabs Solidor or Pleading         Addon Co.           Mill         I         O Advagable         Other tabs Solidor or Pleading         Col         Centre to Solidor or Pleading         Col           Mill         I         O Advagable         Other tabs Solidor or Pleading         Col         Centre to Solidor or Pleading         Col           Mill         I         O I May 2014         D14         Thin         Munor Content         Col         Col         Center to Solidor or Pleading         Col         Content to Solidor or Pleading         Col         Content to Solidor or Pleading         Col         Content to Solidor or Pleading         Col         Col	Spench         Standard Ver         Standard Ver           View         C         A. F. O. A. Date         Time         Handler         Synoppic         Action Co F.           View         C         A. F. O. A. Date         Time         Handler         Synoppic         Action Co F.           View         C         A. F. O. A. Date         Time         Handler         Synoppic         Action Co F.           View         C         A Synoppic         Action Co F.         Action Co F.         Action Co F.           View         C         A Synoppic         Action Co F.         Action Co F.         Action Co F.           View         View         C         Action Co F.         Action Co F.         Action Co F.           View         View         C         Action Co F.         Action Co F.         Action Co F.           View         View         C         Action Co F.         Action Co F.         Action Co F.           View         View         C         Action Co F.         Action Co F.         Action Co F.           View         View         C         C         F.         Action Co F.         Action Co F.           View         C	Specific         Standard Vere         Preview           Specific         A. D.a.         Date         Time         Handler         Specific         Action Co.         F.         F.         D. A.         Date         Time         Handler         Specific         Action Co.         F.         F.         D. A.         Date         Time         Handler         Specific         Action Co.         F.         F.         D.         Date         Time         Handler         Specific         Action Co.         F.         D.         Date         Time         Handler         Specific         Action Co.         F.         D.         Date         Time         Handler         Specific         Action Co.         F.         Date         Time         Handler         Date         Time         Handler         Date         Time         Handler         Date         Time         Handler         Date         Time         Action Co.         F.         Action Co.         F. <td< td=""></td<>

#### 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.

Client/Case	Case:	ABA001/000	01		<b>D</b> -	David Abr						Tel: 01-29022
Case Diary						Family La	N					F/e: BS
Document Manager		Search							Standard	View 🔲	Preview	
Current Client Details	Ad		D A	Date		Time	Handler	Synopsis	Action Co.	F	Letter to Solicitor re Pleading	41.0
Current Case Details Extra Case Details	ion	#		04 May	016	14:59	CN	Letter to Solicitor re Pleading	G03	P ^	Preview Document	-
Associates		<b># 0 !</b>		27 Jun 2	014	11:19	MW	Undertaking changed by BRIANS	ADMUD	P		
Critical Information		5		19 Jun 2	014	11:41	BS	Invoice No:230	D801	P	ABA001/0001/BS	GCU
Know Your Client Linked Cases		S 🧾	1	19 May	2014	16:32	BS	Letter from Accountant	G26	P		
' Linked Cases		5		01 May	014	23:54	BS	Invoice No:229	DB01	P	04 May 2016	
A/c Ledger		5 🛸	1	01 May	2014	22:29	BS	Email Fromkeyhousedemo@gmail.com - Mobile Call to Brian Sweeney	EMI	P		
Time Ledger		5 🗢	1	01 May	014	12:30	BS	Email From:brian@keyhouse.ie - Practice Management Review Agenda	EMI	P	DX 891 Dublin 2	
Debt Ledger Reserve Ledger		5 🗢	1	01 May	014	00:00	BS	Email To: - Financial Trends for the Economy	EMI	P	Allsop & BrownePRIVATE	
Undertakings		S 📞		27 Feb 2	014	09:01	BS	David Abrahams	PHE	P	2 Baggott Street	
		5 🗢	1	27 Feb 2	014	07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for Key Performance Indicators	EMI	P	2 Baggott Street Dublin 2.	
Strong Room		5	1	16 Jul 20	13	15:54	BS	Letter to Solicitor re title Letter to Allsop & Browne	G03	P		_~~

#### 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.

Home Case Reports P	Phone Log Maintain Setup Help								
wittem - Print - Capture Ge		imer Post	Ö t Time						
Client/Case Case	ase: FLY001/0001 Jack F Road		ccident a	at Junction 9 on	M50				e: 01-564 7 e: CN
	ARNING : Money Laundering checks have not bee	n comple	eted for t	this Client.				Ignore	Show
Current Client Details Current Case Details	Action 🔍 🖲	Sear	rch					Standard View	• 🗔
	njuries Board (PIAB)			Date	Time	Handler	Synopsis	Action Co	
Associates Critical Information	nitial Consultation			15 Jan 20	18 16:28	BH	PIAB commencement Letters to all Parties	PIBO2	P ^
	PAB commencement Letters to all Parties		1	15 Mar 2	016 13:02	CN	Review File	G16	P
ct	Thase Letters	iii 👘		# 15 Jan 20	18 16:29	BH	PIA8 commencement Letters to all Parties	PI802	1
A/c Ledger Pa Time Ledger	ay for Medical Report	•		¥ 15 Jan 20	18 16:26	BH	Initial Attendance with Jack Flynn	G01	P
Time Ledger Debt Ledger	Draft Form A and contact Client to review Medical	S 🛛			18 13:03	BH	Brief Builder Docs	G22	P
	lient appointment to review Medical Report and	🗳 🛸		🕴 03 Jan 20	18 14:13	CN	Road Traffic Accident at Junction 9 on M50 [FLY001/0001] Jack Flynn	EMI	P
	ssue PIAB application	S 🛸		# 20 Dec 2	017 14:35	BH	[FLY001/0001] Jack Flynn	EMI	P

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.

0							Keyhouse Case Management (BH - Branda Hardey - 0000 / 0000)			Quick Search (O	(trl + Q) -
Home Case Reports	Phor	e Log	Maintai	in Setup Help							
Vew Item - Actions Print - Capture	Gene		plete Ac	Ction Update Share		er Post Time					
Client/Case	Case:	FLY001/0	001	()							Tel: 01-564
Case Diary					Road Tr	affic Accident	at Junction 9 on M50				F/e: CN
		IING : Mo		undering checks hav		ompleted for					Ignore Show
Current Client Details			_		1					-	
Gurrent Case Details		Search 😨						Standard Vie	ew 🕫	Preview	
🕽 Extra Case Details	Act	A		Date	Time	Handler	Synopsis	Action Co	0	O'Byrne Letter to De	fendants 🛶 👘
Associates Critical Information	9			15 Jan 2018	16:28	BH	PIAB commencement Letters to all Parties	PI802	P	Preview Documen	t
Know Your Client		1	1	15 Mar 2016	13:02	CN	Review File	G16	P	9	
				8 15 Jan 2018	16:29	BH	PIAB commencement Letters to all Parties	PI802	•	Dear	
A/c Ledger		5		8 15 Jan 2018	16:26	BH	Initial Attendance with Jack Flynn	G01	P	Dear	
		s 🛛		8 12 Jan 2018	13:03	BH	Brief Builder Docs	G22	P	4	
Time Ledger				8 03 Jan 2018	14:13	CN	Road Traffic Accident at Junction 9 on M50 [FLY001/0001] Jack Flynn	EMI	P	5	
Debt Ledger		🌠 🍮							-		o suffered severe injury,
Debt Ledger Reserve Ledger		S 🗢		8 20 Dec 2017	14:35	BH	[FLY001/0001] Jack Flynn	EMI	P	e snemeb bre sol	
Time Ledger Debt Ledger Reserve Ledger Undertakings Strong Room				8 20 Dec 2017 8 20 Dec 2017	14:35	BH	(FLY001/0001) Jack Flynn Contract-01	ADMKD			

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

4.

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

Case: AAA001,0001 AAA Securities Ltd Landlord Dispute	Teŀ 012112112 F/e: MW				
WARNING : No activity on this file in over 33 months.	Ignore Show me				
WARNING: Only speak to John Dunne with calling this client.	Ignore Show me				

- Note these warnings are displayed in the Case Diary Screen.
- 2. The caution messages are displayed at the top of the case diary of each case.
- 3. Click on the **Show me button** Show me located to the right of the message you will then move to the **Critical Information Screen** to show further information.
  - Case: AAA001/0001 AAA Securities Ltd Only speak to John Dunne with calling this client. ✓ sł Account Summary Action Su Debtors A/c 7 396.75 Start Date 06 Jun 2010 File Colour Statute Date Outlay A/c 94.63 Solicitor Martina Winters Outlay Budget 0.00 Case Status Who Date Descriptio Current Outstanding Fees 6025.00 Last Action BS 06 Feb 2012 Review File Client A/c 0.00 Last Milestone Action Client Current 0.00 Next Action Client Deposit 0.00 Last Record Time MW 01 Sep 2011 Client Meeting re issue with planning Current Locked up value 7,491.38 ercentage of Estimated Fee Total Work In Progress 0.00 Write off time 0.00 Fees issued to date 6025.00 Fees To Date + WIP 6,025.00 Estimate Fees 0.00 Draft Invoices 0.00 B Last Bill Date 01 Feb 2012 Expected Bill Date Possible value to the client 0.00 Work in Progress Martina Winters 8:20 0.00 0:00 0.00 Activity Research 367.50 1:28 Letter Drafting 1:10 290.00 Attendance 145.00 Advice

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

5. Click on the Ignore

to ignore the message and remove it from the case.

# Case Diary Symbols

	Tasks in Yellow denote milestone tasks
<mark>₽</mark> ₽	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.
1	Tasks with a Red Dot denote a high priority task.
9	Tasks with S denote a Statute of Limitation date or a critical date action.
25	Tasks with a Calendar Symbol denote an appointment.
<u>ح</u>	Tasks with a Phone Symbol denote a phone call.
	Tasks with a yellow note denote a Note.
<b>1</b>	Tasks with a hand denote a delegated task.
4	Tasks with a blue arrow denote tasks of low importance.
	Tasks with U denote an Undertaking.
<u>ب</u>	Tasks with an envelope denote an email sent or received.
ĵ	Tasks with a document attached
0	Tasks with an M denote scanned post
C	Tasks with a C denote critical tasks
T	Task with a building denote Court Dates
	Task denotes Photo ID
0	Task denotes Non Photo ID

# The Case Diary Toolbar

New Item + Actions	New Cl	ick on the New to add any of these tasks.	<ul> <li>☑ Action</li> <li>☑ Note</li> <li>➢ Email</li> <li>☑ Appointment</li> </ul>
			<ul> <li>Phone Message</li> <li>Dictation</li> <li>Draft Invoice</li> <li>Request Cheque</li> <li>Conflict Search</li> </ul>
Print 🗸	Printer Cl	ick to print any of the following reports:	Activity Report     Case Summary Report     Matter Label     Client Label
0 Capture	Capture	Click on capture to launch the document import documents or folders of documen	
Generate	Generate	Click to generate a document for a selected	ed action.
Complete Action	Complete Action	Click to mark a task as complete.	
Start Timer	Start Timer	Click to start the timer for the current cas	e.
New Time Slip	New Time Slip	Click to bring up a manual time slip.	
Start Blank Timer	Start Blank Timer	Click to create a blank time that can be ac a future time or post the time as Admin T	
Dictation	Dictations	Click to dictate to a matter – Note: This o KeyDict and must be activated by the Syst	-

# Navigation within the Case Diary

Case: FIS001/0001 Melinda Fisher Sale of Lands in Wicklow		Tel: 012902222 F/e: CN
Case: FIS001/0001	Case Code	Case Code of current open case. Or To open a case input the case code and press enter.
	Navigation buttons	Move to the previous Case or go to Next Case.
	Search Case List	Click to search for an existing Case. Double click the required case to open.
Quick Search (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
acurrent Client Details	Current client Details	Click on this to view or edit the current client details.
遤 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.
<ol> <li>Critical Information</li> </ol>	Critical Information	Click on this to view critical information specifically for this case.
뉔 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** 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.

Code ABA001			Cli	ent Name	David	Abrahams			
			Env	velope Name	Enter	envelope name			
Corporate	Personal	Legal Details		Billing Detail	s	Permission	Bank Details		
General	Client Contacts	Notes		Matters		Cross Ref	Categories		
Salutation	David			Main Contac	t [	David Abrahams			
Address	123 Mayfair Street			Telephone		01-2902222			
	Dublin 2			Fax No		01-2921345			
				Mobile		35387876810847			
E-Mail	d.abrahams@gmail.co	om		Secondary E-1		Mail Enter seconday email id			
Other ref	Enter other ref			PPS no	Enter PPS number				
Fee Earner *	Ann Mellon		~	Spouse PPS		Enter spouse PPS number			
Client VAT no	Enter VAT number			PPS Tax type		Select PPS tax type		~	
Postal code	Enter postal code			County		Enter county			
DX Address	Enter DX Address			Nationality		Select nationality		~	
				Warning Me	ssage	Enter warning messa	ge		
Web Password	Enter Web Password					Disallow new Matte	rs		
Anti mone	y laundering checked	Check if thi	s Conta	ict is an organi	sation	Receive month	ly statements		
15 Jan 2018				-					

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.
- CorporateClick on Corporate tab to add the company details e.g. Company Registration Number.PersonalClick on the Personal tab to add the client's personal details for e.g. Date of Birth, Date<br/>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** 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	Client Code ABA00 Matter 0001	D1 Description * Fa	amily Law				
	description.			Associate Archive	-		Transaction Lir	nked Cases
		Fee Earner * Secretary	Ann Mellon Select secretary	File Ref     REF 2		r File Ref r User2		
	Using the drop arrows amend	Partner *	Brian Sweeney	V REF 3	Ente	r User3		
		Department *	Family Law	✓ Your Re	f Ente	r YourRef		
	the fee earner, secretary,	Work Type *	Action	~	M	ark as Important		Statement
	partner, department, work	Old Reference	Enter old reference	Branch	Sele	ct branch		¥
	type.	Case Plan & St	atus					
		Case Plan/Type	e * General Office Work	▼ File	Colour Select	file colour	~	Clear
	Input (if applicable) Old Ref	Case Status	Select case status	✓ Rec	cord No Enter r	ecord no		
	Input (if applicable) Old Ref,							
	File Ref, Your Reference.							
		File No 256					<u>о</u> к	Cancel

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 FeesAllows user to enter information about future invoicing in<br/>relation to fees and when the invoice should be issued. The<br/>Fee type can also be added if needed.

٢	Current Case Details	×
Client Code BLA001	Description * RTA Walkinstown Crossroads, G. Black	
Matter 0001 Matter Admin Addition Value to Client Enter va	Estimated Fees x  Add Edit Delete  Search	ed Cases
Started Date 06 May Statute Date Please s Deposit Name Enter of Outlay Budget 120000 Comments	Estir Cancel	Siven
	v	Show In Alert
		ctively Complete
File No 26		OK Cancel

	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 Asso	ciate tab to add, view, edit or delete Case Associates.								
		ternative client details such as client name, salutation, address <b>verride</b> button to apply it to future documents generated.								
Other Details	secretary reference et 🖑 <b>Tip</b> : To amend th	<ul> <li>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.</li> <li>Tip: To amend the user variables click on Extra Case Details on the Navigation panel.</li> </ul>								
🗏 Note th	nese variables are indiv	idual to each case plan type and case.								
Archive	Remove the <b>tick</b> to rec	open a previous archived file.								
<b>Billing Details</b>	Click on the <b>Billing De</b>	tails tab to add information on the billing of this matter.								
	For Debt cases input the total debt amount coll	he charge arrangements, the debt amount collected, and the ected.								
	Charge Rate Level opti	ons, select the billing type and default billing method. Use the ion to set the charge rates. te will all allow for different charging rates for different Fee								
	Earners who may worl	•••								
Permissions	remove particular use	<b>ns tab</b> to control access to this matter, for example to add or r groups. New Groups can be set up by the System Iso control access to the groups.								
Transaction		<b>Client</b> tab. Then click on the <b>Post Button</b> to add a transaction.								
Note the update	ne balance will automa	tically           Matter         Addition 1         Description *         Landlord Dispute           Matter         Matter         Addition 1         Rescription *         Landlord Dispute           Matter         Addition 1         Description *         Landlord Dispute           Matter         Addition 1         Description *         Landlord Dispute           Value         Addition 1         Description *         Landlord Dispute           Value to Client         Enter real								
Linked Cases	Click on the <b>Linked (</b> to link two or more o together.									
Click <b>OK</b> when record.	complete, to update t									
		Show in Alert								
		File No 180 OK Cancel								

#### 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.

Cas	e: [AAA001/0001 4] P AAA Securities Ltd Tel: 0121									
						Landlord I	Dispute		F/e	s MW
WA									Ignore	Show me
WA	RNING	: No a	activity	r on th	nis file in over 2	1 months.			Ignore	Show me
	Search				Standard Vi	ew 🔲				
Act	C /	P	D	A D	ate	Time	Handler	Synopsis	Action Co	F Pre
9	<b>~</b>	ζ.						AAA Securities Ltd		re 🗠
	•	1		0	6 Feb 2012	10:50	BS	Review File	G16	P
	•			0	1 Feb 2012	17:43	BS	Invoice No:225	DB01	P
	•			1	8 Jan 2012	11:13	BS	Invoice No:220		P
	۰ ک	۵.		2	9 Nov 2011	17:04	BS	Phone Call	PHE	P

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

Case	ase: FLY001/0001 Jack Flynn Road Traffic Accident at Junction 9 on M50									
	5	Sea	rch							
Action	C A P D A Date						Time	Handler	Synopsis	
on	S l 04 Jan 2018 09:58 CN Statute of Limitations Date =04 Apr 2018							Statute of Limitations Date =04 Apr 2018		
	<b>~</b>		1	•		25 May 2016	12:59	CN	Review File	

# **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.

D				Cui	rrent Cl	ient Details					
Code	FLY001				Clier	nt Name	Jack I	lynn			
					Enve	lope Name	Enter	envelope name			
Genera	əl	Client Contacts		Notes		Matters		Cross Ref	Cat	egories	
Corpo	rate	Personal	Legal	Details	1	Billing Detail	s	Permission	Bai	nk Detail	s
Charg	e Arrangemei	nt Select charge	arrangem	ent	~	Client Ch	iarge C	ut Rate Indicator	Include Ret	ired	
	ng Type					Search					
	Monthly					Name		Rate	Effective D	ate	
۲	Normal										^
Defa	ault Billing Me	thod									
	Time										
	Charge										
Cha	rge Rate Leve	1									
	1 0 2 @	3 04 0	5								
						Add		Edit	Delete	Dele	te All
						Handlers				andlers	All
						Handlers		¥	All Ha	maiers	
									ОК		Cancel

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

	Add - Client Charge Out Rate Indicator 🛛 🗙
Handler *	Select Handler
Rate *	Enter rate
	OK Cancel

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.

			Current C	lier	nt Details				×
Code FLY001			Clie	nt f	Name	Jack Fly	'nn		
			Env	eloj	pe Name	Enter er	nvelope name		
General	Client Contacts		Notes		Matters		Cross Ref	Categ	gories
Corporate	Personal	Legal	Details	Bill	ling Detail	s	Permission	Bank	Details
Charge Arrangem Billing Type	ent Select charge an	rangeme	ent 🗸		Client Ch	arge Out	t Rate Indicator	Include Retire	ed
O Monthly					Name		Rate	Effective Dat	'e
Normal					Admin		150.00	18 Jun 2018	^
					Anne M	ellon	120.00	18 Jun 2018	
Default Billing N	1ethod				Barbara	Brenn	350.00	18 Jun 2018	
					Brian Sv			18 Jun 2018	
O Time					Carol N			18 Jun 2018	
O Charge					Justin P			18 Jun 2018	
					Mark Ke			18 Jun 2018	
Charge Rate Lev	/el					Wint Keogh		18 Jun 2018 18 Jun 2018	
01 02	• 3 • 4 • 5								~
				F	Add Handlers		Edit	Delete All Hand	Delete All
								<u></u> K	Gancel

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

Ch Ch	ange - Client Charge out Rate Indicator 🗙
Handler *	Barbara Brennan 🗸
Rate *	350.00
Effective date	18 Jun 2018 🗸
Modify By	Barbara Brennan
Last Rate	0.00
	OK Cancel

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.

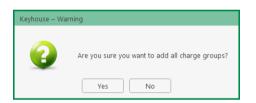
#### Set Handler Charge Group Charge Out Rates

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

١			Curre	ent Cl	ient Details				>
Code FLY001				Clier	nt Name	Jack Fl	ynn		
				Enve	lope Name	Enter e	envelope name		
General	Client Contacts		Notes		Matters		Cross Ref	Catego	ories
Corporate	Personal	Legal D	Details		Billing Detail	ls	Permission	Bank (	Details
Charge Arrangemen Billing Type	nt Select charge a	irrangemei	nt	~	Client Ch	harge Ou	It Rate Indicator	Include Retired	ł
O Monthly					Name		Rate	Effective Date	2
Normal     Default Billing Me     Time     Charge	thod				Code H CG	Handle	<i>e Group</i> ers e Groups	р.	^
Charge Rate Leve	I ●3 ○4 ○5							•	v Delete All
					Handlers		<b>~</b>	All Hand	Cancel
								UK	Cancel

- 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.

D		Cur	rent Clie	nt Details				
Code FLY001				Name ope Name	Jack Flynn Enter envelop			
			Enver	pe Name	Enter envelop	e name		
General	Client Contacts	Notes		Matters	Cro	oss Ref	Categorie	25
Corporate	Personal	Legal Details	Bi	lling Detail	s Pe	rmission	Bank Det	tails
Charge Arrange	ement Select charge a	irrangement	¥	Client Ch	arge Out Rate I	ndicator 🗌	Include Retired	
Billing Type				Search				
O Monthly				Name	Rate		Effective Date	
Normal				PTN			18 Jun 2018	í í
				SAS			18 Jun 2018	
Default Billing	g Method			JAS TNE			18 Jun 2018 18 Jun 2018	
<ul> <li>Time</li> <li>Charge</li> </ul>								
Charge Rate I	Level							
01 02	●3 ○4 ○5							
				Add	Edit		Delete D	elete All
				Charge Gro	oups	•	Add all CG Han	dlers
							ОК	Cancel

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.

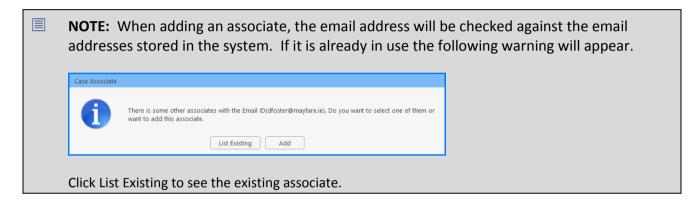
Home Case Reports	Partners Phone Log Maintain Setup	Hel	lo .	Keyhouse Ca	se Management (CN - Carol Nolan - 00:10 / 07:20)			Quick Search (Ctr	1 + Q) - 🗆	×
👻 🔶 🔶 🏈										
Search/Open	Associate Type		Associates	_						
All Matters	Search		Search	Include Retired						1
My Matters Recent Matters	Associate Type		Code	Name/Company	Address	Phone No	Category	Notes	Type	
	ALL	^	000001	Green Associates (Green Associates)	21 Main Street Bray Co. Wicklow	01 6666666			SURVEYOR	j
Advanced Search	Accountants		000002	George Gibbons	The Surgery 23 Heath Road Terenure Dublin 6	01 2345555			DOCTORS	
🛑 My Invoices 🌤 My Cheques	Actuary		000003	Dublin Circuit Court	Circuit Court Office, Aras Ui Dhalaigh, Inns Quay, Dublin 7.				CIRCOURTS	1
👒 My Cheques 🛃 Phone Log	Agents									
Firm Undertakings	Architects		000004	Dublin District Court	Dolphin House, East Essex Street, Dublin 2.				DISCOURTS	
Strong Room Q Document Search	Attorney		000005	Eagle Star (Eagle Star)	Blackrock Co. Dublin				CLIENTINSUR	
Template Library	Auctioneers		000006	Dun Laoghaire Rathdown County Co	Civic Offices Dun Laoghaire Co. Dublin	205 88888			LOCALAUTHORI	
	Banks									
	Barristers		000008	Sexton Keenan	Walkinstown Road, Walkinstown, Dublin12	4500833			OPPOSITION	

- 4. Input the **relevant** information

Full Name:	Input the Full Name	General Oth	her Details Other	Add	Case Associate nents Bank Det	ails Extra Details
First Name		Details Type *	Select a Type		Code *	Enter a code
& Surname:	These will automatically be	Full name * First name Surname	Code	Description 75 Accountants	Phone no Fax no Home	Please enter phone number Please enter fax number Please enter home number
	inputted from the full name field amend if required.	Salutation Company Title Address	ACTUARY AGENT ARCHITECT ATTORNEY	Actuary Agents Architects Attorney	Mobile no E-Mail DX ref	Please enter mobile number Please enter E-Mail id Please enter CM ref Please enter county
Salutation:	Input the Salutation	Address	AUCTIONEERS BANKS BARRISTERS BBSSC ROMREGISTR	Auctioneers     Banks     Barristers     BBSSC Contacts     Renistrar for Rirths, Deaths & M.	County Postal Code	
Company:	Input the company name	Search Relationsh	ip Name	Phone Email	.11	Address
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.	e code	e blan	k the syster	n wil	l assign a numeric
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.

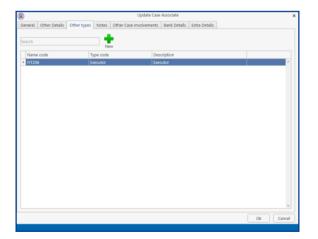
5. Click OK.



# 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**.



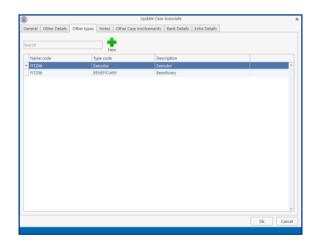
2. Click on the **New** Button and the following screen will appear.

٢				Update 0	Case Associate			×
General	Other Details	Other types	s Notes	Other Case Involvement	nts Bank Details	Extra Details		
Search				ew .				
Nam	e code		Type code		Description			
► FITZI	16		Executor		Executor			^
				Add Other Types Please Select Type Ok	Cancel	V	Ok	V

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

k	DOX.	
	Add Other Types	
	BENEFICIARY	-
	ACCOUNTANTS	^
L	ACTUARY	-
	AGENT	
	ARCHITECT	
	ATTORNEY	
	AUCTIONEERS	
	BANKS	
	BARRISTERS	
	BBSSC	
	BDMREGISTRAR	
	BENEFICIARY	
	BORROWERS	
	BRANCH	
	CHARITY	
	CHILDREN	
	CIRCOURTS	
	CLAIMHANDI FR	1

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



5. Click OK.

#### Maintaining unwanted Case Associates

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

#### **Retire a Case Associate**

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

)						Update Cas	e Associate					
General	Other	Details	Other types	Notes	Other Case	e Involvements	Bank Detai	ls Ex	tra Details			
Details												
Type *	S	Solicitors				~	Code *	JOEBO	OL			
Full nam	ne * 🛛	oe Blogg	s				Phone no	045 3	534553			
First nar	ne E	Enter first	name				Fax no	Please	e enter fax number			
Surname	e E	Enter surn	ame				Home	Please	e enter home number			
Salutatio	on S	Sirs					Mobile no	Please	e enter mobile number			
Compar	ny J	oe Blogg	s Solicitors				E-Mail	info@	bloggs.ie			
Title	P	Please ent	ter title				DX ref	DX 52	246 Naas			
Address		4 Main S	treet				County	Please	e enter county			
		Naas Co Kildare	2				Postal Code	Please	e enter postal code			
							[	🗌 Reti	ired			
										-	P	
Search										New	Edit	Delete
Relatio	onship	N	lame	Pho	ne	Email			Address			
									1.001255			
												_
											0k	Cano

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

#### Merge Case Associates

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

1. Open the Associate Type concerned.

Home Case Reports	Partners Phone Log Maintain Setup	Hel	lp	Keyhouse Ca	se Management (CN - Carol Nolan - 0010 / 0720)			Quick Search (Cb	rl + Q) -	×
Import Export Centact										
W All Matters	Associate Type		Associates Search	Include Retired						
k My Matters Recent Matters			Code	Name/Company	Address	Phone No	Category	Notes	Туре	
	Associate Type Garda	•	JO0001	Stillorgan Station (Stillorgan Garda S	2 Main Street, Stillorgan, Co. Dublin	2833445			GARDA	
Advanced Search			S00001							
My Invoices     My Cheques     My Cheques     Mrhone Log     Orimr Undertakings     Strong Room     Cournent Search     Template Library										

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

Search						
Туре	Name/Company	Address	Phone	Email	Code	Retired
Garda	Rathmines Gard	1 Main Street Rathmines Dub			GAR004	N
Garda	Stillorgan Statio	2 Main Street, Stillorgan, Co	2833445		JO0001	
Carda	Starongari Stationi	2 main ou cet, ounorgan, com	2000 110		100000	"

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.

	etails Other types Notes	Other Case Involvements	Bank Details					
earch								
Case	Name	Des	Description					
GRE001/0001	Green & Alridge	Joh	n Flint -v- Sam Hume					
MUL001/0001	Mulligan & Murray	Har	ry Williams -v- Department of Health					
BLO001/0008	Joe Bloggs	Ren	nortgage - top up Ioan					
CLI001/0001	Bill Clinton		air dismissal by State Department					
MER001/0001	Merri Munchkins		chase 12 Main Street Sligo					
MUR002/0001	Bob Murphy		Purchase of No. 1 The Square Tallaght					
SMY001/0001	Laura Smyth	Lau	ra Smyth v Joe Byrne					
TOB001/0001	Avril Tobin	Sale	of The Cottage, Ashbourne, Co Meath					
WEI001/0002	James Weis	Pur	chase Penthouse Suite Morehampton Court Dublin 4					

- 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**.

	s Phone Log 🕴	Maintain Setup Help	Keyhouse Case Ma	anagement (CN - Carol No	olan - 00:05 / 00:00)				(a)	•
La Professional Print										
Client/Case	Case: ABA001/00	0001 I David Abrahams								Tel: 01-29
Case Diary		Family Law								F/e: AM
Document Manager	Search									Standard Vie
Current Client Details	Type	Name/Company	Address	Phone	Solicitors Ref	Email	Case Code	Mobile	Assigned Contact Name	
Current Case Details Other Case Details	Barrister		The Law Library, Dublin 8.	01-8788888		f.edwards@lawlibra		087-7666666		
Associates	Other Pa	arty Paul Smith (Paul Smith)	33 Green Park Dundrum	016755555		psmith@gmail.com	ABA001/0001			
(now Your Client	Solicitors	s Allsop & Browne (Allsop & Bro	2 Baggott Street Dublin 2.	01 6655777		info@allsopbrowne	ABA001/0001			
	Contact Deta	ails			Main Contacts	s Details (if applicable)				
	Contact Deta	talls   Frank Edwards			Main Contacts	s Details (if applicable)				
					Name	s Details (if applicable)				
	Name	Frank Edwards			Name Address	s Details (if applicable)				
Tasks	Name Company Address	Frank Edwards Frank Edwards BL The Law Library, Dubin 8.			Name Address Phone	s Details (if applicable)				
Tasks Search/Open	Name Company Address Phone	Prank Edwards Frank Edwards BL The Law Library, Dublin 8. 01-8788888			Name Address Phone Mobile	s Details (if applicable)				
	Name Company Address	Frank Edwards Frank Edwards BL The Law Library, Dubin 8.			Name Address Phone	s Details (f applicable)				

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.

		Add	Case Associate Professional				đ ×
Action							
👻 🚖 🕂 💉 🐹 🚔							
nport Export Add Edit Delete Print							
ssociate Type	Associates						
Search	Search						Standard View
Associate Type	Code	Name/Company	Address	Phone No	Category	Туре	Notes
ALL	000001	Green Associates (Green Associates)	21 Main Street Bray Co. Wicklow	01 6666666		Surveyor	<u>^</u>
Accountants	000002	George Gibbons	The Surgery 23 Heath Road Terenure Dublin 6	01 2345555		Doctors	
Agents	000003	Dublin	Circuit Court Office, Aras Ui Dhalaigh, Inns Quay, Dublin 7.			CirCourts	
Architects							
Attorney	000004	Dublin	Dolphin House, East Essex Street, Dublin 2.			DisCourts	
Auctioneers	000005	Eagle Star (Eagle Star)	Blackrock Co. Dublin			ClientInsur	
Banks	000006	Dun Laophaire Bathdown County Cou	Civic Offices Dun Laoghaire Co. Dublin	205 88888		LocalAuthori	
Barristers			-	200 00000			
BBSSC Contacts	000007	MICKEY MOUSE	77 Benbulbin Road, Dimnagh, DUBLIN 12			Purchaser	
Registrar for Births, Deaths & Marriage	000008	Sexton Keenan	Walkinstown Road, Walkinstown, Dublin12	4500833		Solicitors	
Beneficiary	000008	Sexton Keenan	Walkinstown Road, Walkinstown, Dublin12	4500833		Solicitors	
Borrowers		JEAGH REENAN	Transitstown Road, Transitstown, Dubinne	4500035		JORCHOTS	
ACCBank Branch	904236	Kilkenny (Bank of Ireland)	5 Main Street Kilkenny Co. Kilkenny	042 677777		Lendinst	
Charities	904354	Sutton (Bank of Ireland)	23 High Street Sutton Co. Dublin	4566677		Lendinst	
children		and the second sec	o Street R		-		

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).

Action mport Export Add Edit Delete Print	1								
	1								
nport export Add Edit Delete Prin	.								
Contact Associate Print									
ssociate Type		Associate	S						
sol	<u>e</u> [	Search		]				Standard Vie	w
Associate Type		Code	Name/Company	Address	Phone No	Category	Туре	Notes	
Solicitors	^	000008	Sexton Keenan	Walkinstown Road, Walkinst	4500833		Solicito		
		904394	E. P. Daly & Co	23/24 Lower Dorset Street D			Solicito		
		904397	Michael Browne, (	James Street Westport Co			Solicito		
		904400	Daly Lynch Crowe	The Corn Exchange Burgh Q			Solicito		
		904406	test1				Solicito		
		904459	Sexton Keenan (S	Dundrom Dublin14			Solicito		
		ABE001	Abercorn (Aberco	Solicitors 38 Pembroke Roa			Solicito		
		ACT001	Actons (Actons)	Solicitors 22/24 Lower Mou			Solicito		
	~	101000	D. D. A. L. (D.		0505.0				
						Ac	id 🚺 🗍	Add and Close Clo	ose

- 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**.

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** and 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

	Action							Add Case A	ssociate Professional
Ir	nport Export	_		X Delete	Print Party Labels				
	Contact	A	ssocia	ite	Print				
A	ssociate T	ype				Asso	ociate	es	
[	Search					Sear	ch		
	Associate Ty	pe				Co	de	Name/Company	Address
Þ	ALL				^	00	0001	Green Associates (	21 Main Street Bray Co. Wickl
	Accountants					00	0002	George Gibbons	The Surgery 23 Heath Road T
_	Agents					00	0003	Dublin	Circuit Court Office, Aras Ui D
~	Architects	~~		~~~	~~	00	00.0/***	- the second	Polopinum

First name       Enter first name       Fia no       Please etc.         Surrame       Enter surrame       Hone       Please etc.         Salutation       Please enter sultation       Mobile no       Please etc.         Company       Please enter sultation       County       Please etc.         Address       Please enter sultation       County       Please etc.         Relationship       Name       Please etc.       Please etc.         Eearch       Italian       Italian       Address         Relationship       Name       Phone       Itmail       A         Deirdre       Nolan       Address       Italian       Italian         Salutation       Deirdre       Phone       Italian       Italian         Salutation       Deirdre       Phone       Italian       Fax       Enter	
Type * Banks Code * Enter ad   Full name * Enter full name Please enter company Fail name   Salutation Please enter company E-Mail Please enter company   Title Mobile no Please enter company E-Mail   Please enter company E-Mail Please enter company E-Mail   Please enter company Please enter company E-Mail Addecase Associate Contact   Salutation Name Phone Email A   Please enter company Please enter company ID ID   Itame * ID ID ID ID   Deirdre Nolan ID Fax Enter   Salutation Deirdre Phone Please Please   Salutation Deirdre Please Please Please   Salutation Deirdre Please Please Pleas	e enter phone number e enter fax number e enter fox number e enter mobile number e enter mobile number e enter CM ref e enter CM ref e enter county
Full name       Phone no.       Please e         First name       Far no.       Please e         Suntame       Far no.       Please e         Company       Please enter solutation       Mobile no.         Please enter company       E-Mail       Please e         Please enter solutation       DX ref       Please e         Please enter solutation       County       Please enter         Address       Please enter address       County       Please enter         Search       ID       ID       ID         Search       ID       ID	e enter phone number e enter fax number e enter fox number e enter mobile number e enter mobile number e enter CM ref e enter CM ref e enter county
First name Enter first name Fias no Please et Surrame Inter surrame Home Please et Salutation Please enter dompany E-Hall Please et Rober enter company E-Hall Please et Rober enter company E-Hall Please et Rober enter address County Please et Postal Code Please et Please et Rober et E-Mail Please et Rober et E-Mail Please et Please et Rober et Rober et Please et P	e enter fax number e enter home number es enter mobile number e enter E-Mail id enter E-Mail id e enter CX ref e enter county
Suntame Enter surrame Home Please e Sultation Please enter sultation Mobile no Please e Company Please enter company E - Mail Please e Address Please enter stills Driver Please enter Address Please enter address County Please enter Please enter address County Please enter address County Please enter Please enter address County Please enter address County Please enter Please enter address County Please enter address County Please enter Please enter address County Please enter address County Please enter Please enter address County Please enter address County Please enter Please enter address County Please enter address County Please enter address County Please enter Please enter address County Please enter	ie enter home number ie enter mobile number ie enter E-Mail id e enter DX ref ie enter county
Salutation Please enter salutation Mobile no Please enter salutation Please enter company Please enter company Please enter address Ple	ie enter mobile number ie enter E-Mail Id e enter DX ref ie enter county
Company       Please enter company       E-Mail       Please enter         Title       Please enter title       DK ref       Please enter         Address       Please enter address       County       Please enter         Bearch       Please enter       Please enter       Please enter         Bearch       Image: Please enter       Please enter       Please enter         Bearch       Image: Please enter       Image: Please enter       Please enter         Search       Image: Please enter       Image: Please enter       Image: Please enter         Deirdre Nolan       Image: Please enter       Image: Please enter       Image: Please enter         Salutation       Deirdre       Please enter	ie enter E-Mail id e enter DX ref ie enter county
Title     Max     Please enter address     County     Please enter address       Search     County     Please enter address     County     Please enter address       Search     Image: County     Please enter address     County     Please enter address       Search     Image: County     Name     Please enter address     Please enter address       Search     Image: County     Name     Please enter address     Image: County       Search     Image: County     Name     Please enter address     Image: County       Mathematical Address     Image: County     Image: County     Image: County     Image: County       Salutation     Deirdre     Please enter address     Image: County     Please enter address       Salutation     Deirdre     Please enter address     Image: County     Image: County       Salutation     Deirdre     Please enter address     Image: County     Image: County	e enter DX ref se enter county
Address Please enter address County Please e Bearch Retree Bearch Retree	se enter county
Postal Code       Person e         Person e       Retires         Pelanionship       Name       Phone       Email       A         Pelanionship       Name       Phone       Email       D       ID	
Search       Retired         Relationship       Name         Phone       Email         Add Case Associate Contact         sociate Code         Aldo Case Associate Contact         sociate Code         Aldo Case Associate Contact         ame *         veirdre Nolan         ddress         Main Street ray to Wicklow         Salutation         Deirdre       Phone         Frax       Em         Mobile       En         Relationship       Manager         otes       Otes	e enter postal code
Belationship       Name       Phone       Email       A         Pelationship       Name       Phone       Email       A         Decidre       Add Case Associate Contact       ID       ID         ame *       Decidre Nolan       ID       ID         Decidre Nolan       ID       ID       ID         Salutation       Deirdre       Phone       01         Title       MS       Fax       En         Relationship       Manager       Mobile       En         otes       Decides       ID       ID       ID	,
Name       Phone       Email       A         Matationship       Name       Phone       Email       A         Main Street       ID       ID       ID         ame *       ID       ID       ID         Salutation       Deirdre       Phone       01         Title       MS       Fax       En         Betationship       Manager       Mobile       En	tired
Add Case Associate Contact ssociate Code AIB011 ID ID ame * ID ID ID sociate Code AIB011 ID ID ame * ID ID sociate Code AIB011 ID ID ame * ID ID Salutation ID Eirdre ID ID Salutation ID Eirdre ID	🛉 💋 🗙 New Edit Delete
sociate Code AIB011 ID	Address
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ame * Deirdre Nolan ddress Main Street Tray to Wicklow Salutation Title MS Phone 01 Fax En Mc En Relationship Manager otes	
beirdre Nolan ddress E Main Street tray so Wicklow Salutation E-mail Manager otes	
ddress       Main Street ray       io Wicklow       Salutation       Deirdre       MS       E-mail       deirdrenoloan@aib.ie       Manager	
Main Street ray o Wicklow Salutation Deirdre Phone 01 Fax En Mobile En Mobile En Mobile En Mobile En	
ray o Wicklow Salutation Deirdre Phone 01 Fax En E-mail deirdrenoloan@aib.ie Mobile En Relationship Manager otes	
ray io Wicklow Salutation Deirdre Phone 01 Title MS Fax En Mobile En Relationship Manager otes	
Salutation     Deirdre     Phone     01       Tritle     MS     Fax     En       E-mail     deirdrenoloan@aib.ie     Mobile     En       Relationship     Manager     otes	
Title MS Fax En En En Mobile En Mobi	
Title MS Fax En E-mail deirdrenoloan@aib.ie Mobile En Relationship Manager	
E-mail deirdrenoloan@aib.ie Mobile En Relationship Manager  otes	01-555 6654
Relationship Manager	Enter fax number
otes	Enter mobile number
Aanager at Main Street, Bray	
	Ok Cance

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.

	Partners Phone Lo	og Maintain Setup Help		Keyhouse Case Managemeet	(CN - Carol Nolari - 80.00 / 80.0	*1				G Oxick Search (C		
Erofessional Print												
Client/Case Case Diary	Case: AAA301,0001	AAA Securi Landlord (										E 01211
Document Manager		2 Include Reta	red								Standar	d View
Current Client Details Current Case Details	Type	Name/Company	Address	Phone	Solicitors Ref Em	ol	Case Code	Mobile	Assigned Contact Na	Assigned Contact Ph	Retired	
otra Case Details associates Inical Information inow Your Client	> Solicitors	Adams Corporate (Adams	Solicitors 9 Exchange Place				AAA001/0001		Erian Adams	01-553 1236	N	
/cLedger ime Ledger ubt Ledger eserve Ledger indertakings												
	Contact Details				Main G	ontacts Details	s (fl applicable)					
		ams Corporate			Main G Name	ontacts Details						- '
	Name Ada Company Ada	arns Corporate			Norre	Brian Add						
	Name Ada Company Ada Address 9.0	ans Corporate Icitors Icitarse Mace			Addres	Brian Ada	9716					
Taolas	Name Ada Company Ada Address 9 D 1F 1	ams Corporate Icitors			Addres Phone	Brian Add	9716					
Tacks Search/Open	Name Ads Company Ads Address 9 D IF 1 Phone	ans Corporate Icitors Icitarse Mace			Addres Phone Mobile	9 1 9 1 9 1 9 1 9 1 9 1 9 1 9 1 9 1 9 1	236					•
	Name Ada Company Ada Address 9 D 1F 1	ans Corporate Icitors Icitarse Mace			Addres Phone	Brian Ada	236					•

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.

🖗 🔶 🧨 🧳	¥							
pathpat 400 blk.	06.82							
Scarch/Uppn	Associate Type	Associates						
All MARRIED		a Seet	Landonia					warded.
cytorations locard Matters		Code	Namplaneary	Alles	Proce has	Garger	No.	190°
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ly thread and ly Classica		NEXT	National Institute California Institute	5 Mare Street Dubler 2	0.6073044			Silens
m underteiligen		#15201	199	1 Monished Tran & Moule	02405850			SENS
trong Room								

# 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** Add Professional on the Home tab of the Ribbon.

8

- 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** Edit ; the following dialog box will appear.

eneral O	ther Details	Other types	Notes	Other Case Involvem	ents Bank (	Details	Extra Details						
Details													
Type *	Solicitors			5	Code *		JOEBOL						
Full name *	Joe Blog	gs			Phone n	•	35345534						
First name	Enter firs	t name			Fax no		123123123						
Surname	Enter sur	name			Home		12312312						
Salutation	Please er	Please enter salutation				0	12312312						
Company	Joe Blog	Joe Bloggs Solicitors				j	oebloggs@bloggs.ie						
Title	Please er	Please enter title					Pleae enter DX ref						
Address Main Street			County		Please enter county								
	Dublin Ireland			Postal Code Please enter post		Please enter postal code							
							Retired						
Search								+ New	C/ Edit	X			
Relations	hip	Name	Pho	ne Email			Address						

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 <b>Details tab</b> to add personal information such as date of birth, occupation etc.
Other Types	Click on the <b>Other Types</b> tabs to see if this associate is a member of any other category.
Other Details (optional)	Click on the <b>Other Details tab</b> to add a specific court and court date.
Notes	Click on the Notes tab to add additional notes about the case associate.
Other Case Involvements	Click on the <b>Other Case Involvements tab</b> to view a list of cases this case associate is connected to.
Bank Details	Click to <b>Bank Details</b> 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.

	Associate is link	ted to Cases 🗖 🗙
		Cases. Any changes you make will be k OK to save the changes.
Case	Name	Description
BLO003/0001	Jack Flynn	Road Traffic Accident at Juntion on M5
ZZ0001/0007	Joe Kent	Sale of 3 Rose Lawns, Castleknock, Duł
0	c Return to	cediting Cancel

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.

Dther Side Details Dur Code Enter our code	r I	Insurance Details Our Code	Enter our code	
Dther Reference Enter other reference			Enter insurance reference	

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

Other Side Det	ails		Insurance Details		
Our Code	904461	<b>– ×</b>	Our Code	KOEG01	_ ×
	Bloggs & Co			Stephen Keogh (Stephen Ke	ogh)
Other Reference	e Enter other reference		Insurance Referen	ce Enter insurance reference	

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

#### How to Remove a Case Associate from a Case

۲

- Open a case in the Case Diary.
   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 New

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.

				Edit Case	Associate				×
General Associate	Contact Details	Other details	Other Types	Notes	Other Case In	volvements	Bank Details	Sequence	1
Search		New Ec	) 🗙 Jit Delete	Sign 2	(2) Unassign				
Relationship Na	ime	Phone	Email		Address				
									^
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~^	m	$\sim$		man	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~	$\sim$
			Ad	d Assoc	iate Conta	ct			×
•									
Associate code	BLO001						ID	13	_
Name *									
Enter name									
Address									
Enter address									
Salutation	Entorica	lutation			Phone	Entor	phone numb	or	
Title	Please e	enter title			Fax		fax number		
E-Mail	Enter er	mail ID			Mobile	Enter	mobile num	ber	
Relationship	Enter re	lationship							
Note									
Enter note									
								Ok	Cancel
			_	_	_	_			

- 4. Click Ok.

# **Print Options**

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



# **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

		Keybouse Case Management (DL-Cerilleler - IBBL/ 050)	(Reg Chardt Serverth (Chri + Ch
🛎 🚔 🛈	k Prome log Manthen Serie Help Free Second Complete Action Presenter		
	Cene: SMP001/S001		Two: 05905-0-
Case Duey	Laura Smyth v coa Byrne		1/1: MK
Docement Manager	WOUTENED I Manage Launchering charles have not losses completed for this client.		lpone Stor
Carriert Client Details	Search		Standard View
Other Case Details	C. A. F. D. A. Late Time Hendle Sympole		Aufian Daul F.a.
Acceliates Critical Information	8		<ul> <li>Id Press Document</li> </ul>
Etone Your Cleat Archeogre Time Lodger Extri Lodger Indians Lodger Indians Lodger			
I Strong Room			
	Attachments Scente		Standard View 📰 🖉
Tests	Type Occurrent	Version Date Document Cless	
Search/Open			
ClientyCase			
time Coving			v .

- 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** <sup>\*</sup> 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.

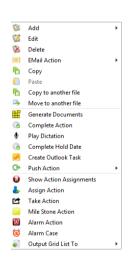
# To Complete A Task

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



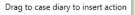
2) Click on **Complete Hold Date** to complete the action with the same date as it was generated.

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**.

Case Diary	
2	Choose your prefered option. Click "Open Document" to open the document for this action or click "Open Action Details" to open the action details.
🔲 Do not show	again and remember the last choice I made
	Open Document Open Action Details

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

Action						Change Action ( 3	087)			- )
Generate	achment ation De	fault Actions	🔗 Email 🗩 Email (Ter		High Normal Low Priority	Take Action	C Generate	🕲 Save		
Case Action C Date Subject	ABA00 Code G03 04 Ma Letter	y 2016 to Solicitor re P	I Fa	imily Law	-					
Gener Fe/Ha Team Letter t	ndler Care	Appointment of Nolan Inmercial e Pleading		•						
									Ok Car	ncel

**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.

1				Change Action ( 388	053)	- ×
Action						
Generate Docum	-		t High	-	😰 Save	
Copen Attachmen		ete 🔶 Email	Normal	Assign Action		
Play Dictation	≍ Print	😤 Email (Template)				
	Default Actio		Priority	Assignment		
General Proper	rties Attachme	ent/Documents Action	Assignments	Other Notes		
Action Status N	JA			Y	N/A	
Flag 💡	P Clear Flag			¥		
Publish		Priority	r •	Category		
None		⊖ High		Action	O Statute Date	
O Publish Or	nly	Normal		O Fixed Dated Actic	on O Critical Date	
O Export On	aly .	O Low		O Note	O Court Date	
				<ul> <li>Appointment</li> </ul>	O Scanned Post/Mail	
				O Reminder	O Cheque Request	
				O Email	O Photo ID	
				O Phone Message	O Non Photo ID	
Publish Status		Other Properties		O Dictation	O Corporate Entities	
Communic	ication Sent	Milestone		O Undertaking		
		Complete				
		Billable				
		Documents Proce				
		Know Your Client				
						Ok Cancel
			1			

Publish Status:This applies only to data<br/>that is published to an external source. A tick will appear stating a<br/>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

General         Attachaner/Occuments         Attachaner/Occuments         Attachaner/Support           Date Intered         Document         Version         Doc Class         Track Mr         Tell Path           Image: State	op ∳Pla	en A y Dic	ttachment tation De	Post Time Note     Complete Semail     Print Semail (Template)     fault Actions	Priority	Take A	Action	C,	Delete Attachment Precedent Copy Attachment	<ul> <li>History</li> </ul>	Save Save	
1         0 100 2013         Letter to Whense Mitemas 2         1 Comps.         2440         13phpsondimet documentSiAAD700014/tert to           1         0 100 2013         Letter to Invanion Company         1 Letters/L         2019         13phpsondimet documentSiAAD7000014/tert to           1         0 100 2013         Letter to Invanion Company         1 Cerresp.         2018         13phpsondimet documentSiAAD7000014/tert to           1         0 100 2013         Letter to Company         2018         13phpsondimet documentSiAAD7000014/tert to           1         0 100 2013         Letter to Company         2018         13phpsondimet documentSiAAD7000014/tert to           1         0 100 2013         Letter to Company         2018         13phpsondimet documentSiAAD7000014/tert to           1         0 100 2013         Letter solution         1 Corresp.         2015         13phpsondimet documentSiAAD700001000114/tert to           1         0 100 2013         Letter solution         1 Cerresp.         2016         13phpsondimet documentSiAAD700001000175/tert L           1         0 100 2013         Otypes Letter to Defindedist         1 LetteryL         2034         13phpsondimet documentSiAAD70000000000175/tert L           1         0 100 100 100 100 100 100 100 100 100 1	Gen											
III         00 Nre 2015         Letter to insurance Company         1         Letters/to.         2638         Elliphybound/dilet document/BLA20102001Letter to.           III         00 Nre 2015         Letter to Engineer         1         Compp.         2638         Elliphybound/dilet document/BLA20102001Letter to.           III         00 Nre 2015         Letter to Engineer         1         Compp.         2638         Elliphybound/dilett document/BLA20102001Letter to.           III         00 Nre 2015         Letter to Statial         1         Compp.         2636         Elliphybound/dilett document/BLA20102001Letter to.           III         00 Nre 2015         Letter Notheas         1         Comp.         2636         Elliphonat/dilett document/BLA20102001Letter to.           III         00 Nre 2015         Letter to Defendants         1         Centery.         2636         Elliphonate/BLA201020012/D0017Cityre to.           IIII         00 Nre 2015         O'Byre Letter to Defendants         1         LetteryL.         2634         Elliphybound/Elliphicanter/BLA20102001020017Cityre L.           IIII         00 Nre 2015         O'Byre Letter to Defendants         1         LetteryL.         2634         Elliphybound/Elliphicanter/BLA20102001020017Cityre L.	Ŀ.						_	_	 			_
IP         01 Nov.2013         Lefter to Engineer         1 Comego												
IP         00 Nov 2015         Lefter to Cardial         1 Corresp         2607         15/wphosed/dilett document/8/LA0010001Lefter to           IP         00 Nov 2015         Lefter to Withows         1 Corresp         2606         Ukphosed/dilett document/8/LA0010001Lefter to           IP         01 Nov 2015         Lefter to Withows         1 Corresp         2606         Ukphosed/dilett document/8/LA0010001Lefter id           IP         01 Nov 2015         O'Byre Lefter to Defendants         1 Lefters/L         2534         Ukphosed/dilett document/8/LA00100010001Lefter id           IP         01 Nov 2015         O'Byre Lefter to Defendants         1 Lefters/L												
10         00 Nov 2015         Letter to Witness         1         Corresp         2836         tikeyhoues(diert documents[JLd07]0001);dtert inl           11         Dis Nov 2015         Clefter informing Cleft after firs         1         Cleft Likeyhoues(diert documents[JLd07]0001);dtert inl           12         01 Nov 2015         Olyme Letter to Defendants         1         Letters/n         2634         tikeyhoues(diert documents[JLd07]0001);dtyme L           12         01 Nov 2015         Vorming Letter to Defendants         1         Letters/n												
R         01 New 2015         Letter informing Client after firs         1 Client La         26315         153/nphoungLient document/6/L00070001/effetr infl.           R         01 New 2015         Orgime Letter to Defendent         1 Letters/L         2634         153/nphoungLient document/6/L00070001/effetr infl.           R         01 New 2015         Waring Letter to Defendent         1 Letters/L         2634         153/nphoungLient document/6/L0007001/07/npmL.           R         01 New 2015         Waring Letter to Defendent         1 Letters/L         2633         153/nphoungLient document/6/L0007001/07/npmL.												
R         03 Nov 2015         O'Byrne Letter to Defendants         1         Letters/L         2634         tijkeyhousei/client documents/8LA001(0001/O'Byrne L           R         03 Nov 2015         Warning Letter to Defendant         1         Letters/L         2633         tijkeyhousei/client documents/8LA001(0001Warning												
😥 03 Nov 2015 Warning Letter to Defendant 1 Letters/ 2633 t:\keyhouse\client documents\8LA001\0001\Warning												

#### **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 A**ttachment** 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** Sedit Attachment located on the toolbar. The following dialog box will appear.

Document Properties	×
ation	
Letter to Lending Institution	
04 Nov 2014	
Letters/Interparty Correspondance	~
Document	
Ok Cancel	
	Letter to Lending Institution O4 Nov 2014 V Letters/Interparty Correspondance Document

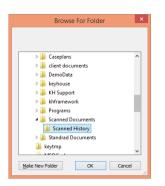
- iii. Amend the following details as required
- iv. **Document Name** Click in the input box and amend as required.
- v. **Class/Category** Click on the drop-down arrow for a list of document classes, and select the required category, e.g. Letter, Pleadings, Inter-Party Correspondence etc.
- i. Click **OK** to save the changes.

#### Link to Folder

- i. Click to the **Attachment/ Documents** Tab.
- ii. Click on the Link to Folder button.

Favorite Links	Name	Folder Date modified	Туре	Size	Q
Documents Recently Changed Recently Changed Rote > Folders Folders Folders ReportsC ReportsC S Column Sector Sect	preTest     Aspell     PRE UPGR     ReportsCF     ReportsCF     ReportsCF     ReportsCF     ReportsCF     SQL Script     User Repo     _S6TPSX     ABCSelect     AccProDo     ACCRUAL     Accrun     active	R CURRENT Rold is rts c			
ReportsC	Accrun	S.TPS	•	Al Files	

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**.

Genera	ate Document	Post Time	Note		1 High	PT Take A	tion	100	ttachment	Delete Attac	ment 📔	Paste	Save	
Open A	Attachment	✓ Complete	Email		Normal	Assign	Action		ink to Folder	Precedent	0	History		
Play Di	ictation	au Print	Email (Te	molate)	Low 8			52	dit Attachment	Copy				
	De	fault Actions			Priority	Assignm	ient	-		Attachment				
Seneral	Properties	Attachment/Do	ocuments	Action	Assignments	Other No	otes							
	Date Entered	Document			Version	Doc Class	Track	Ref	File Path					
1	07 Sep 2015	New sign-in fro	om Chrome	on	1	General		2599	t\keyhouse\dii	ent documents\B	LA001\00	01\New :	sign	^
	07 Sep 2015	keyhole			1	General		2600	t\keyhouse\cli	ent documentsB	LA001\00	01\keyhc	ole_2	
	07 Sep 2015	profilephoto			1	General		2601	t:\keyhouse\cli	int documents\B	LA001\00	01\profil	eph	
	07 Sep 2015	google_logo			1	General		2602	t\keyhouse\cli	ent documents\/B	LA001\00	01\gcog	le_lo	
	07 Sep 2015	windows			1	General		2603	t:\keyhouse\clii	int documents\/B	LA001\00	01\windo	ows	
	07 Sep 2015	down_arrow				General				int documents\/B				_
• 🚺	03 Nov 2015	Link Folder T:\	keyhouse\S		1	General	:		T:\keyhouse\Sc					

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

		~
Details File Info	rmation	
Document Nam	e: Letter to Lending Institution2	
Document Dat	e: 04 Nov 2014	
Document Clas	s: Letters/Interparty Correspondance	~
Document Typ	e: Document	
Ē	Ok Cancel	

- 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.

					Chang	e Action ( 97	(8)						-
Action													
Gene	rate Document 🕜 Po	st Time 📒 N	lote	1 H	gh 📑 Tal	e Action	😰 Save						
Dpen	Attachment 🛛 🖌 Co	mplete 🏓 E	mail	N	ormal 🕹 Ass	ign Action							
Play D	Dictation 🗰 Pri	nt 🗢 E	mail (Template)	<b>₽</b> Le	w 🌡 Del	lete Assignm	ents						
	Default A	ctions		Pri	ority A	Assignment							
Genera	al Properties Attac	hment/Docu	ments Action	Assigr	ments Othe	r Notes							
	Ву	Action	For		Date Assigned	Time Assigned	Date Returned	Time Returned	Assigned By	Returned By	Delegate	Team	A
> 🗸	Brian Sweeney(BS)	Processed	Brian Sweeney(	BS)	12 Feb 2014							сом	1
-	Brian Sweeney(BS)	Processed	Brian Sweeney(	BS)	21 Jan 2014	14:34		23:59	BS	BS	BS	COM	
1	Brian Sweeney(BS)	Complet	Brian Sweeney(	BS)	18 Jan 2012	11:10	31 Jan 2012	09:37	BS		BS	COM	
<ul> <li>Image: A start of the start of</li></ul>	Brian Sweeney(BS)	Complet	Brian Sweeney(	BS)	06 May 2011	11:10		23:59	BS	BS	BS	UT	
1	Brian Sweeney(BS)	Processed	Brian Sweeney(	BS)	06 May 2011	11:10		23:59	BS	BS	BS	COM	
	Brian Sweenev(BS)	Created	Brian Sweenev(	RS1	04 Mar 2015	10:11	06 May 2011	11:10	BS		BS	UT	

#### 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.

۱				Change Action (9	78)	- ×
Action						
📅 Generate Document	🖉 Post Time	. Note	t High	Take Action	📽 Save	
🏜 Open Attachment	🗸 Complete	🗢 Email	Normal	🕹 Assign Action		
Play Dictation	38 Print	<sup>e</sup> Email (Template)	Low			
D	efault Actions		Priority	Assignment		
General Properties	Attachment/	Documents Action	Assignments	Other Notes		
Please review						
Please review						

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

# **Deleting a Task**

- 1. Right Click on the task in the case diary the following menu will appear.
- 2. Click on **Delete**. Selete
- 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. Copy
- 3. Then **Right Click** again in the case diary: the menu above will appear.

Copying a Task to another matter	4.	Click on Paste. Paste	<ul> <li>S</li> <li>S</li></ul>	Add Edit Delete EMail Action	•	
<ol> <li>Right Click on the task in the case diary: the menu above will appear.</li> <li>Click on Copy to another matter.</li> <li>Copy to another file</li> <li>Copy to another file</li> <li>Show Action Assignments</li> <li>A list of cases will appear search for the required case.</li> <li>Then Double click to coloct</li> <li>Alarm Action</li> <li>Alarm Case</li> </ol>	Со	pying a Task to another matter	Б С Б С	Paste Copy to another file		
<ul> <li>2. Click on Copy to another matter. Copy to another file</li> <li>3. A list of cases will appear search for the required case.</li> <li>4. Then Double click to coloct</li> <li>5. A list of cases will appear search for the required case.</li> </ul>	1.	<b>Right Click</b> on the <b>task</b> in the <b>case diary</b> : the menu above will appear.	₩ • •	Complete Action Play Dictation		
<ul> <li>A list of cases will appear search for the required case.</li> <li>Mile Stone Action</li> <li>Alarm Action</li> <li>Alarm Case</li> </ul>	2.	Click on Copy to another matter. 🚹 Copy to another file	<mark>&gt;</mark> ©	Push Action	•	
4 Then Double click to coloct	3.	A list of cases will appear search for the required case.		Take Action Mile Stone Action		
	4.	Then <b>Double click</b> to select.	12 (10) (10) (10) (10) (10) (10) (10) (10)	Alarm Case	•	

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

# Moving a Task to another matter

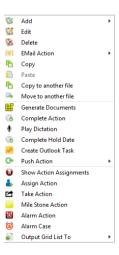
- 1. Right Click on the task in the case diary: the menu above will appear.
- 2. Click on Move to another matter.
- 3. A list of cases will appear search for the required case.
- 4. Then **Double click** to select.
  - NOTE: You will automatically move to the case diary of the case selected.

# <sup>₩</sup> 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
  - 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.

Re	sour	ces					
Da	ate	04 Nov 2	014	✓ Time :	19:32		
	Sear	ch					
		Code	Name		Number of Due Tasks	Team	
Þ		ADM	Admin			LIT	
		AM	Anne Mellon		5	СОМ	
		BS	Brian Sweeney		7	СОМ	
	25	COM	Commercial			СОМ	
	25	LIT	Litigation			LIT	
		MW	Martina Winters		1	LIT	
		SK	Stephen Keogh		1	COM	
					elease Action	Ok Ca	ance

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.

Assign Action

- 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.

١									Keyhouse Case Management (CN - Carol Nolan - 00.00 / 07.3)
Home Case Repo	irts Ph	ione	Log	м	aintai	n Setup Help			
New Item • Print • Cap	)		te Co		o te Ac	tion Start Timer P Accourt			
Client/Case	Case	e: Bl	LA00	1/000	01		Gordo	n T. Black	
Case Diary							RTA W	alkinstown Cro	issroads, G. Black
Document Manager	WAF	RNIN	IG : I	nvoic	es ou	tstanding over 3 \	/ears 6 Mon	ths 1 Days .	
Surrent Client Details		_					_		
Surrent Case Details		S	Sea	rch					
🎒 Other Case Details	Action	C	A	P	D	A Date	Time	Handler	Synopsis
🕸 Associates	9		9	1		15 Mar 2015	17:00	BS	Statute of Limitations Date = 25/03/2015
Critical Information				1		13 Mar 2015	17:17	BS	Review File
🚔 Know Your Client		Ħ				04 Mar 2015	10:11	CN	Prepare Papers for Counsel.
		•	0	1		28 Oct 2015	11:51	CN	provide proof of ID
A/c Ledger		•				i 07 Sep 2015	15:33	CN	Email From:no-reply@accounts.google.com - New sign-in from Chrome on Win
😺 Time Ledger 😺 Debt Ledger		•	٢			ii 07 Sep 2015	15:29	CN	Email To:Shaun Dwyer - [BLA001/0001] Gordon T. Black
Debt Ledger Reserve Ledger		•				01 Sep 2015	12:15	CN	Letter to Client ?
Undertakings		•				04 Aug 2015	12:35	CN	Email To:'training.keyhouse.ie@gmail.co - Test Email
•••••••••••••••••••••••••••••••••••••••		•				04 Aug 2015	12:31	CN	Email To:Brenda Hartley - [BLA001/0001] Gordon T. Black
Strong Room		•	۲			i 28 Jul 2015	15:05	CN	Email To: - [BLA001/0001] Gordon T. Black
		۷				03 Mar 2015	17:23	BS	test
		•				03 Mar 2015	17:17	BS	Letter to Client
		•				# 16 Jan 2014	09:37	BS	Email To:brian@keyhousedemo.ie - Draft Pleadings from Counsel

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

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

8										Keyhouse Case Management (CN - Carol Noian - 0
Home Case Rep	orts	Part	ners	Pł	hone	e Log	Maintain Se	tup Help		
	A	R	8		10	5	<b>`</b>	Ö		
	U	Ш	ĕ,		1	9		•		
New Item  Print  Ca Actions	pture 6		rate Xocum		plet	e Acti	on Start Timer P Account			
		ara		001/	000			Cordo	n T. Black	
Client/Case	-	.012.								issroads. G. Black
📕 Case Diary										
Document Manager	- P	NARI	AIING	i : inv	/0101	tuo 25	standing over 4 1	/ears 28 Daj	S.	
Se Current Client Details			an L	lient			6	6		
Surrent Case Details										
Extra case Details Associates		Action		A F	P		. Date	Time	Handler	Synopsis
Critical Information		ă I	Ħ\$				12 Feb 2016	11:49	CN	Letter to Client
w Know Your Client			1¢			<b>P</b> - 1	12 Feb 2016	09:51	CN	Letter to Client
			Hł.				12 Feb 2016	09:46	CN	Letter to Client
👪 A/c Ledger			#				12 Feb 2016	09:39	CN	Letter to Client
🙀 Time Ledger			•				24 May 2016	17:27	CN	Letter to Client
Debt Ledger			•			-	12 Feb 2016	11:58	CN	Letter to Client
Undertakings			•				01 Sep 2015	12:15	CN	Letter to Client ?
Cincertakings			•				03 Mar 2015	17:17	RS	Letter to Client
Strong Room			e				09 Dec 2010	22:12	BS	Ask Client to call to sign Application form PIAB
			e			1	18 Nov 2010	22:08	BS	Has Clent confirmed appointment ?
			6							
		- 1	<b>S</b>				12 Nov 2010	22:06	BS	Send Client for own medical exam.

- 5. Click **cancel** to reset.
  - Tip to refresh the Case Diary click on refresh tool located next to the search box on the search bar.

#### How to sort and filter the Case Diary Columns

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

## How to filter Case Diary Columns

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

Case	: BL(	0001/0	0027	•	Þ.	Joe Blogg Road Tra	gs ffic Accident V	Valkinstown	round abo	ut			Cas	e: BL	000	1/0027		٩).		IS ffic Accident V	Valkinstown	ound about
WAR																			Road Ina	ine Accident v	VUINITSCONTE	ound about
	8	Search			Ø	1							WA	RNIN	G : I	Please ch	neck (	AML				
Acti				Date	*	Time	Handler	Team	Synopsis					3	Cool	-ala		$\otimes$				
9	•			18 Apr 20	19	15:56	BH	1	1	Select Ha	undles/c)			~	Sear	cn		0				
	•			18 Apr 20	19	15:56	BH	. 🛈		Select Ha	indier(s)		Action					Date 💌	Time	Handler <sup>9</sup>	Team	Synopsis
	•	25		07 Mar 2	019	12:19	SKE	Search:					ion		A			18 Apr 2019	15:56	вн	TRA	Lease Agreement
	•	25		07 Mar 2	019	12:19	SKE	se Se	lected	Code	Name	^										-
	•	۲	8	06 Mar 2	019	17:37	BH	-	~	BH	Brenda Hartley			•				18 Apr 2019	15:56	BH	TRA	Word Document?
	•		1	28 Feb 20	19	09:39	SKE			DVDL	Darina Galvin			•	1			06 Mar 2019	17:37	BH	TRA	Email From:Gerry Murray < gmurray@
	•		1	28 Feb 20	19	09:39	SKE			DH	David Hussey Gerry Murray	_			۵		8	18 Dec 2018	17:18	BH	TRA	Letter from Barrister
	•	۲	1	26 Feb 20	19	15:34	KA			GMU	Jiby Jacob	blogg	5]		0							
	•		8	25 Feb 20	19	16:45	KA	-		KA	Ken Allen							17 Dec 2018	17:11	BH	TRA	Lettter from Accountant
	•		8	14 Feb 20	19	12:45	KA			MW	Martina Winters			•	۵		8	14 Dec 2018	17:30	BH	TRA	Letter from Accountant
	•	0	1	18 Dec 20	18	17:18	BH															
	•	٩	1	17 Dec 20	18	17:11	BH			Ok	Cancel											
	•	0	8	14 Dec 20	18	17:30	BH	-				.el										
	•		18	12 Dec 20	18	16:30	KA	CAS	Letter to	Solicitor												

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

Home Case Reports	Phone L	og Maintain Setup Help			Key	house Case Management	(CN - Carol Nolan -	00.01 / 07:29)				Quick Search (Ctrl + Q)	
ew Item - Print Export 1		ö ö 🚺 😽 🔌	ompile Brief	Use Adobe PD		MS Word Workshare							
Client/Case	Case: BLA	001/0001 Gordon T. Black RTA Walkinstown	n Crossroads, G	i. Black									el: 01 476 /e: BS
Case Diary Document Manager	Search	Search text									Standard View	Letter to Client	
Current Client Details Current Case Details	Type	Document Name     Letter to Client		Date •	Version	Document Class	Source	From	То	Subject Letter to Client	File	BLA001/0001/BS/A	м
Extra Case Details Associates Critical Information		Letter to Client Attendance Sheet		12 Feb 2016		1 Client Letters 1 Instruction Sheets	Case Case			Letter to Client Initial Attendance	t\k t\k	12 February 2016	
Know Your Client	6	Letter to Client	12 Feb 2016	12 Feb 2016		1 Client Letters	Case			Letter to Client	t:\k		
A/c Ledger	12	Letter to Client		12 Feb 2016		1 Client Letters	Case			Letter to Client	t:\k	Gordon T. Black	
Time Ledger	R	Letter to Client		12 Feb 2016		1 Client Letters	Case			Letter to Client	t:\k	23 Ellis Park Rathmines	
Debt Ledger Reserve Ledger		Letter to Client		12 Feb 2016		1 Client Letters 1 Client Letters	Case			Letter to Client	t:\k t:\k	Dublin 6	
Undertakings		down_arrow		07 Sep 2015		1 General		no-renly@acc	keyhousetest.	New sign-in from Chrome on Windo			
Strong Room	6	windows		07 Sep 2015		1 General				New sign-in from Chrome on Windo			
at ony room	6	google_logo	07 Sep 2015	07 Sep 2015		1 General	Received E-m	no-reply@acc	keyhousetest	New sign-in from Chrome on Windo	ws t\k		
		profilephoto	07 Sep 2015	07 Sep 2015		1 General	Received E-m	no-reply@acc	keyhousetest	New sign-in from Chrome on Windo	ws t:\k	Re: RTA Walkinstown Cros	

# 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.

		RTA Walkinsto	wn Crossroads, G	Black						
💾 Case Diary										
ប Document Manager	S pleadin	igs 💿 😒 🖂 Search text								Standard View
🗞 Current Client Details	Type 🖉	Document Name	Diary Date	Version	Date 🔻	Document Class	Source	From	То	Subject
Current Case Details	•	blac01-0001	16 Jan 2014	1	21 Jan 2014	Correspondance	Sent E-mail	brian@keyho	brian@keyho	Draft Pleadings from Counsel
Other Case Details	1	Draft Pleadings from Counsel	16 Jan 2014	1	21 Jan 2014	Correspondance	Sent E-mail	brian@keyho	brian@keyho	Draft Pleadings from Counsel
Associates	E.	Draft Civil Bill	22 Nov 2011	1	22 Nov 2011	Pleadings	Received E-m			Draft Pleadings
Critical Information	1 1	Draft Pleadings	22 Nov 2011	1	22 Nov 2011	Correspondance	Received E-m			Draft Pleadings
Your Client	E .	Special Damages	09 Dec 2010	1	19 Oct 2011	Pleadings	Case			Ask Client to call to sign Application form PIA
A/c Ledger		PIAB Application Form - 1 Defendant	09 Dec 2010	1	19 Oct 2011	Pleadings	Case			Ask Client to call to sign Application form PIA
Time Ledger	E .	Civil Bill (CC) RTA_132	10 Nov 2010	1	10 Nov 2010	Pleadings	Received E-m	Brian Sweeney	brian@keyho	Draft Civil Bill
Debt Ledger										
Reserve Ledger										
Undertakings										

- 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.

Document File Name Re	quired
Matter:	BLA001/0001 Gordon T. Black RTA Walkinstown Crossroads, G. Black
Document Name: <u>C</u> lass/Category:	Letter to Client ? Ok Cancel

- 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.

A Document Selection	A 50 (1-4) (01 (1-5) (20)		X
Tag document for pr	ocessing.		
Search		Go	Clear
AUCLT	Letter to Auctioneer?		Ν
✓ GENG02A	Letter to Client ?		N
14 44 4 2 5 55	71 4		
<u>T</u> ag/UnTag	Can	.cel	<u>O</u> k

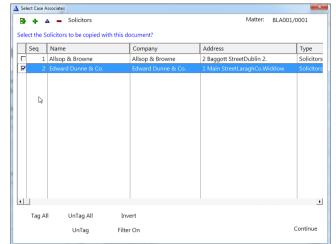
#### Adding Case Associates when generating a document

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.
- There are two solicitors assigned to this case, you can tag the solicitor provided then click on the **amend** button <a>Change</a> 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.



						e Associate					
neral	Associate Cont	act Details	Other details	Other Types	Notes	Other Case Involvem	ents	Bank Details	Sequence	1	
Details	s										
Type *	G	arda			¥.	Code *	JOOO	01			
full Na	ame * St	illorgan Stati	on			Phone Number	28334	445			
First Na	lame E	nter first nam	e			Fax Number	Enter	fax number			
Suman	me El	ter surname				Home	Enter	home number			
alutat	tion G	arda Jones				Mobile Number	Enter	mobile numb	er		
Compa	any St	illorgan Gard	a Station			E-Mail	Enter	email			
itle		ter title				DX Reference	Enter	DX reference			
		Main Street,				Nominated					
\ddres		illorgan, 5. Dublin				County		Enter county			
toores	33					Postal Code Enter postal code					
pecifi	ic Information Fo	r Case									
Othe	er Side Details					Insurance Details					
Our	Code	Enter	our code			Our Code		Enter our coo	le		
Othe	er Reference	NAN/	DC80007/1234		1	Insurance Reference		Enter insuran	ce reference		
		-									
Assoc	ciate for the othe	r side	Publish								
										QK	Cano

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

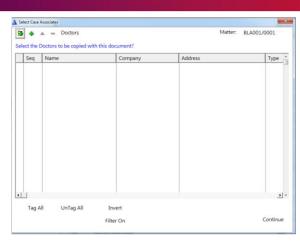
**Note** If you tag two solicitors two documents will be generated.

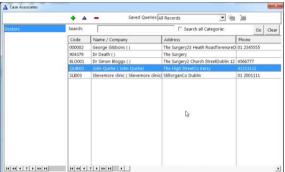
- 7. Click Continue.
- 8. Word will open displaying the letter to solicitor.
- 9. Edit the document in Word as normal as required.
- 10. Save any changes and Print as required.
- 11. The action/task and document will then be present in the **Case Diary** for future review.

# 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
   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 **Select**. The following screen will reappear listing the doctor assigned to the case.
- 8. Using the tick boxes provided **tag** the required Doctor and click **Continue**.
- 9. Word will open showing the letter to doctor
- 10. Edit the document in Word as normal as required.
- 11. Save any changes and Print as required.
- 12. The task and document will then be available in the Keyhouse Case Diary for further review.





Select

International Other Dr. Type: Code Full Nam First Nar Sumanne Salutatio Compan Title: Address	Doctors	tes   Other cases involven	Phone No Fax No Home: E-Mail County: Postal Code:		
A = Relationship	Search: Name	Phone	<u>Go</u>	Clear Ernail	Address



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

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

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

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

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

Messag	e
	The Second Defendant is not assigned to this case do you wish to assign one now.
?	CAM001/0002 Tony & Marie Campbell Tony & Marie Campbell
	Yes No Ignore

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.
- To amend click on the extra case details shortcut Extra Case Details available on the case diary navigation panel. The following screen will appear.

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

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.

🛕 Update User V	ariable			<b>X</b>
General Prope	artion	-		
BLA001/0002	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Dublin 6			
Secretary's Re	eference			
,				
				<< >>
		N/a	OK	Cancel
Client/Case	Case: [RL4001/0082 4 ]			
Document Manager	Form (Default View) v Search			
S Current Case Details Cher Case Details Associates	Detail I tist the Contents passing with the house (if any).	Value None		
Critical Information	Contents NOT parsing with property 2 of any) Sale Price of property (eg. 100,000,00) Deposit Amount in Nal (eg. 10,000,00) 7	N/A 200,000.00 20,000.00		
A/c Ledger	Description of the property for the Contract. This genesis to be light includence of the Contract.	in the property know		
Carline and an	Maintain Other Case Details	Concidente	A A AMA	X
General Prope				~
BLA001/0002				
	Sale of 2 Trinity Close, Rathgar, Dublin 6			
Contents NC	OT passing with property ? (if any)			
Curtains in s	itting room			
			Ok	Cancel
			JK	tencer
				<u> </u>

		Maintain Associate Other Detail	×
General	Properties		
Associat	e Code:	904391	
Name:		Simon Shaw	
Type:		Defendant	
Case Co	de:	GRE002/0002	
Associat	e Sequence:	1	
Date of	demand		
08 Jar	n 2019	V	
		OK Cance	

# **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.

		Select the Documents you want to Generate			×
Matter	GRE002/0002 -	Roger Greene			L.
	Personal Injury				40
earch		0			
ML.	Document	Name			Pie
	CCL03A	Personal Injuries Summons		📂 N	LICAICIA
	CCL03B	Affidavit of Verification		📂 N	1
	CCL03C	Letter to Client end draft Proceedings		p N	
			Ok	Cancel	]

#### Naming and classifying a Document

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

- 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.

	Rename and/or Reclassify the document(s) you are about to Generate	
Matter GRE002/00 Personal Ir	002 - Roger Greene njury	
Document Name	Letter to Client ?	
Document Class Preview	Client Letters v 🚺	
		Ok Canc

- 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.

Matter GRE002/0002 - Roger Greene

Personal Injury

- 1. The following dialog box has appeared requesting the user to select a Solicitor for this letter.
- If the solicitor displayed is not the solicitor, you want to write to click on the Add/Maintain button Add/Maintain and add the new case associate as previous outlined in the section on "How to Add a new Case Associate".
- Search Add/Maintain 4

Select Case Associate(s)

- 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.

- 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.
- Click on the Add/Maintain button
   Add/Maintain Add/Maintain and the following screen will appear.

Î		Select Case Associate(s)			×
Matter G	GRE002/0002 - Roger Greene				6
P	ersonal Injury				-
Search	1			Add/Maintain 🙅	
Na	ime	Company	Type		Pre
					Preview
			Ok	Skip Cancel	

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

Plus 槽

- 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.

ompany Please ent tle Please ent	Other types rs name name ter salutation ter company ter title	Schitth Anter Davide gode	star times thappy The Sara (Quika) The Trigt	ase Associate ents Bank Deta	Enter a code Please enter p Please enter l Please enter l	phone number ax number		ACCOR ACCOR ACCOR ACCOR ACCOR
etails etails pe * GP Doctor ill name * Enter full r rst name Enter first urname Enter sum lutation Please ent Please ent Please ent Please ent	Other types rs name name ter salutation ter company ter title	Anter Davide (pute	Add C Case Involveme	ase Associate ents Bank Deta Code * Phone no Fax no Home	annu iis Extra Deta Enter a code Please enter I Please enter I Please enter I	phone number ax number		DOCTORS
etails etails pe * GP Doctor ill name * Enter full r rst name Enter first urname Enter sum lutation Please ent Please ent Please ent Please ent	Conter types of the second sec		Add C Case Involveme	ase Associate ents Bank Deta Code * Phone no Fax no Home	ils Extra Deta Enter a code Please enter f Please enter f Please enter f	phone number ax number		
etails etails pe * GP Doctor ill name * Enter full r rst name Enter first urname Enter sum lutation Please ent Please ent Please ent Please ent	rs name name ter salutation ter company ter title	Notes Other	Case Involveme	ents Bank Deta	Enter a code Please enter p Please enter l Please enter l	phone number ax number		245 [Feld and Glose
etails etails pe * GP Doctor ill name * Enter full r rst name Enter first urname Enter sum lutation Please ent Please ent Please ent Please ent	rs name name ter salutation ter company ter title	Notes Other	Case Involveme	ents Bank Deta	Enter a code Please enter p Please enter l Please enter l	phone number ax number		[ Juli ] [Feld and Close
etails pe * GP Doctor ill name * Enter full r rst name Enter first urname Enter sum lutation Please ent Please ent Please ent Please ent	rs name name ter salutation ter company ter title	Notes Other	Case Involveme	ents Bank Deta	Enter a code Please enter p Please enter l Please enter l	phone number ax number		
etails pe * GP Doctor ill name * Enter full r rst name Enter first urname Enter sum lutation Please ent Please ent Please ent Please ent	rs name name ter salutation ter company ter title	Notes Other	Case Involveme	ents Bank Deta	Enter a code Please enter p Please enter l Please enter l	phone number ax number		
etails pe * GP Doctor ill name * Enter full r rst name Enter first urname Enter sum lutation Please ent Please ent Please ent Please ent	rs name name ter salutation ter company ter title	Notes Other	Case Involveme	ents Bank Deta	Enter a code Please enter p Please enter l Please enter l	phone number ax number		
etails pe * GP Doctor ill name * Enter full r rst name Enter first urname Enter sum lutation Please ent Please ent Please ent Please ent	rs name name ter salutation ter company ter title	Notes Other		Code * Phone no Fax no Home	Enter a code Please enter p Please enter l Please enter l	phone number ax number		
GP Doctor           Ill name *         Enter full r           Irst name         Enter full r           Irrname         Enter sum           Iultation         Please ent           Opparate         Please ent           Please ent         Please ent	name name ter salutation ter company ter title		V	Phone no Fax no Home	Please enter p Please enter t Please enter t	ax number		
Ill name * Enter full r rst name Enter first irmame Enter sum Ilutation Please ent Please ent Please ent	name name ter salutation ter company ter title			Phone no Fax no Home	Please enter p Please enter t Please enter t	ax number		
rst name Enter first urname Enter sum Ilutation Please ent Please ent the Please ent	name name ter salutation ter company ter title			Fax no Home	Please enter f	ax number		
Internation Please ent pompany Please ent Please ent Please ent	aame ter salutation ter company ter title			Home	Please enter l			
Ilutation Please ent pmpany Please ent tle Please ent	ter salutation ter company ter title					nome number		
pompany Please ent tle Please ent	ter company ter title			Mobile no				
tle Please ent	ter title				Please enter mobile number			
					Please enter I	-Mail id		
ddress Please ent	ter address			DX ref	Pleae enter D	X ref		
	Please enter address			County	Please enter of	county		
				Postal Code	Please enter	oostal code		
					Retired			
				_			-	2 ×
earch							New	dit Delete
Relationship N	Name	Phone	Email		Addre	55		

	Select Case Associate(s)		n ×
Matter GRE002/0002 - Roger Greene			C
Personal Injury			-
Search	1	Add/Maintain 着	4
Name	Company	Type	Preview
Dr Tom Crowe		GP Doctors	VIEV
<			>
		Ok Skip Cance	
			đ

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

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

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

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

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

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

	Please provide some missing information	
Matter CA	M001/0002 - Tony & Marie Campbell	
Pu	irchase 66 Archer Park Drive	-
PLEASE N	NOTE:	
	not enough " <b>Defendant</b> " contacts assigned to this Case and the document you are generating requires at least <b>2</b> int" contacts.	
Would yo	u like to add a new "Defendant" contact now?	
	Ves - Create New "Defendant" now No - Leave blank this time Never - Ignore, don't prompt in future	

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

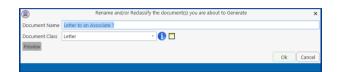
Click **Ignore** if you do not have a second defendant on this case and do not want to add one in the future. In this case, all future actions/tasks generated will not request this information.

- 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.

۲		Select Case Associate(s)					Select Case Associ	iate(s)		
Search		1	Add/Maintain	<u>e</u> .	Search		1		Add/Maintai	in 🙁
	Name	Company	Type	210	20	Name	0	ompany	Type	
	Hugh Jackman		Defendant	viev	<b>V</b>	Hugh Jackman			Defendant	
	Tom Cruise		Defendant			Tom Cruise			Defendant	
	Russell Smyth		Defendant			Russell Smyth			Defendant	
	Bloggs & Co		Solicitors		1	Bloggs & Co			Solicitors	
					<					>
			Ok Skip Cance	ы					Ok Skip Ca	ancel
			Ok Skip Cance	ы					Ok Skip C	

- 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.
- To amend click on the extra case details shortcut Extra Case Details available on the case diary navigation panel. The following screen will appear.

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

	Maintain Other Case Details	
General Properties		
GRE002/0002 Roger Greene		
Personal Injury		
Enter Secretary's Reference		
Enter a value		
Linter a value		
		OK Canc



General Properties	Maintain Other Case Details	>
BLA001/0002	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Dublin 6	
Contents NOT pa	assing with property ? (if any)	1
Curtains in sittin	g room	
	Ok Cano	el
	🔶 🔶	4

# 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).

Action 🔍	٠	s									
Injuries Board (PIAR)				¥.,	D.	٨.	Date	Time	Handler	Synops	
Initial Consultation		-				÷.	04 Mar 2015	1001	CN .		
PIAB commencement Letters to all Parties		•	0	1			28 Oct 201	Add Lot		•	proof of D
Chase Letters		•				ł.	07 Sep 20	Delete			rommo-reply@accounts.google.com - Ne
Pay for Medical Report		•	3			ł.	07 Sep 20	FMail Artis	0		Plan File Artion
Draft Form A and contact Client to review Med	ical	•					01 Sep 20	Copy			EMail Action (using Template)
Client appointment to review Medical Report a	nd	•	3			ł.	04 Aug 20 🚺	Pusite		- 1	oftraining keyhouse Jedligmail.co - Test Er
Issue PIA8 application		•				i.	64 Aug 20 🌓	Copy to an			oßrenda Hartley - (8LA001/0001) Gordon
Check on PAU admosfedgement (5.50)		•	\$			÷	28 Jul 201: 🏪	Mans te ar			o: + (BLA001/0001) Gordon T. Block
Renew PI48 application		•				i.	03 Mar 20	Generate I			
Send Special Damages schedule to FIA3		•				ł.	03 Mar 20 鶯	Complete Complete			o Clert
PIAB Assessment and Brist		•	\$				16 Jan 201	Cuesta Cue			obrian@keyhousedemo.ie - Draft Pleadin
Error in Medical Report		•	٩			ł.	28 Aug 20	Shew Artis	in Anigoments		a Report
Chase Barrister		•	٥				29 Nov 20 👗	Annigo Act			e Finance
Contact Client re PI48 Barrister Opinion		•	3			i.	22 Nov 20 🖻	Take Artic			oc - Draft Pleadings
Client appointment to decide on Assessment		•	٢,				11 Aug 20 🔜	Mile Stone	Action		Black
Accepting PIAB Assessment		•					12 May 20 👪				No218
Take instructions on legal proceedings		•				÷	19 Jan 201 🧕	Alarm Cas			pettiement
Review whether Monies received		•	٥			ł.	13 Jan 201	Output Ge	diletito	•	a' Statement
Close Re		•				1	05 Jan 2011	22:21	85	Replys	o 7443 Queries

- 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.

Keyhouse Outlook Add-in Settings											
Keyhouse Outlook Add-in Version 5.8.1.2 For .NET Framework 4.6.2											
Restore Question Prompts and items flagged as Do Not Show Again											
Saving of Assigned Sent Items											
<ul> <li>✓ - Ignore Image Attachments</li> <li>✓ - Hide Images when selecting Attachments</li> <li> that are less than 1000 pixels wide or 1000 pixels tall.</li> <li>✓ Only if Embedded</li> </ul>											
Case Information Options Case Code Reprocess Items Periodically Store Client Name											
✓ Store Case Description											
Email Options Remove Email Reply Chain Don't check internal mail addresses											
Convert Attachments to PDF Include Track Changes											
Use Email date for all attachments Don't check any mail addresses											
□ Navigate to Case Diary											
Show potentially missing assignments in <b>red</b>											
Uncomplete Emails with Follow On Actions											
Do not store Appointments as Completed Actions											
Subject Line Subject line Append to existing subject line											
Prefix:											
Subject Line: MAT:Code CNT:Name											
Ok Cancel											

# Working with Documents already processed

#### Marking a Task as Complete

Tasks having been generated for 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.
- 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

i)				What	s Next?		×
Remind Client to return signed A	uth	orit	y is complete.	Check the	box('s) provided to choose what you w	ould like to do next?	
			Decision	Code	Next Action Description	On	
	Þ		Do	PSL02	Remind Client to return signed Authority	Wednesday, 05 Feb 2020	Ŷ
			Do	PSL03	Get Title from Lender and/or Land Reg	Friday, 31 Jan 2020	
is for							~

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

Home Case Reports	Phone Log Ma	iintain Se	tup Help			Keyhouse Case Management (CN - Carol Holan - 0001 / 0728)			Quick Search (Ctrl + Q)
Vitem - Actions	re Generate Complet Documents	e Action St	tart Timer Po Account						
Client/Case	Case: BLA001/000	1	• •		T. Black	rroads, G. Black			Tel: 01 4 F/e: BS
ase Diary	WARNING : Invoice	is outstandi	ing over 3 V			iroada, G. biatik			Ignore Sho
ocument Manager Current Client Details			ing orer or		15 15 00,51			_	1
urrent Case Details	Search						Standard	View	Preview
dra Case Details ssociates	Actio C A P I	D A Dat	te	Time	Handler	Synopsis	Action Co		Warning Letter to Defendant
ritical Information	ă 🛗	# 21	Jan 2016	17:13	CN	PIAB commencement Letters to all Parties	PI802	^ م	Preview Document
ow Your Client	01	08	Jan 2016	11:59	CN	provide proof of ID	ADMUD	P	BLA001/0001/BS
Ledger	9	01	Sep 2015	09:42	CN	Critical Date	G23	P	511001/0001/55
: Ledger ne Ledger	1	01	Sep 2015	09:42	CN	Review File	G16	P	
bt Ledger	9 !		Mar 2015	17:00	BS	Statute of Limitations Date = 25/03/2015	ADMSD	P	David Green
serve Ledger	1		Mar 2015	17:17	BS	Review File	G16	P	66 Florence Parade Terenure
dertakings	<b>#</b>		Mar 2015	10:11	BS	Prepare Papers for Counsel.		<b>P</b>	Dublin 6
ong Room	S 😒		Sep 2015	15:33	CN	Email From:no-reply@accounts.google.com - New sign-in from Chrome on Win	EMI	9	21 January 20
	S 🗢		Sep 2015	15:29	CN	Email To:Shaun Dwyer - [BLA001/0001] Gordon T. Black	EMI	9	
	6		Sep 2015	12:15	CN	Letter to Client ?	G02	9	Re: RTA Walkinstown
	S 🗢		Aug 2015	12:35	CN	Email To:'training.keyhouse.ie@gmail.co - Test Email	EMI	P	Crossroads, G. Black Our Client: Gordon T. Black
	S 🔊		Aug 2015	12:31	CN	Email To:Brenda Hartley - [BLA001/0001] Gordon T. Black	EMI	P	Our Client: Gordon 1. Black
	S 🗢		Jul 2015	15:05	CN	Email To: - [BLA001/0001] Gordon T. Black	EMI	P	Dear Mr Green,
	S 📒		Mar 2015	17:23	BS	test	G13	P	We act for the above named who has
	6		Mar 2015	17:17	BS	Letter to Client	G02	P	suffered personal injuries as a result of
	S 🗢		Jan 2014	09:37	BS	Email To:brian@keyhousedemo.ie - Draft Pleadings from Counsel	EMI	P	accident on the above date.
	<b>0</b>		Aug 2012	12:33	BS	Medical Report	G13	P	We are satisfied from our instructions that
	S (0) S (2)		Nov 2011	11:56	BS	Letter re Finance	P00	P	you are responsible for this accident and therefore liable to compensate our client for
	S S		Nov 2011	09:36	MW	Email To: - Draft Pleadings	EMI	9	therefore liable to compensate our client to their personal injury, loss and damage. We
			Aug 2011	11:09	MW	Gordon Black	PHO	P	hereby call upon you to admit liability to o client in an open letter within 10 days from
	S		May 2011	14:33	BS	Invoice No:218	D801 020	P v	the date hereof.
			Jan 2011	22:23	BS	Reject settlement			In the event of it being necessary, our clier
	Attachme	nts Search					Standard View	*	claim for damages will be the subject of a
Tasks	Type Do					Version Date Document Class		_	application to the Personal Injuries Assessment Board ("PIAB").
Search/Open	R Wa	arning Lette	r to Defenda	ant		1 21 Jan 2016 Letters/Interparty Correspondance		^	
									In the event that it becomes necessary to issue proceedings against you, our client w
Client/Case									as part of their claim, seek from you the c

- 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.

Attachments

#### Changing the Name and Class of a Generated Document

- 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.

	Type	Docume	nt			
Þ	(C	Letter to	Lending Instituti	0 0	Properties History	
	)) Details	File Informa	Documer	nt Pro	perties	 ×
	Docume	nt Name:	Letter to Lending I	nstitu	tion2	
	Docum	ent Date:	04 Nov 2014	~		
	Docum	ent Class:	Letters/Interparty	Corre	spondance	¥
	Docum	ent Type:	Document			
	È.		Ok		Cancel	

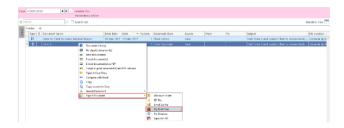
# **Exporting and Importing Documents**

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

	Preference	×
Main Application User Preferences	Other User Preferences Views	
Remember Sync Document Name V My Briefcase	Vith Subject Line Browse For Folder	
Show Case Associative Contact Det Retain Last Matter Search My Overview Settings Budget Daily Hours (HH-MM) (2) OS Invoice Limit Choose what to show first on the p SDLT XML path Allow focus to the top after complete	> Brenda       > Brenda       > Monta       > Starters       > Starters	— ОК Салсе!

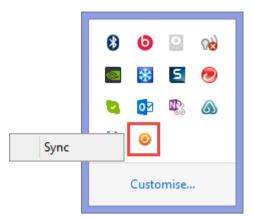
- 5. Click on the Browse Button to the right of My Briefcase.
- 6. Locate the folder you created to hold the exported files, click OK and click OK again
- 7. Open to the required matter and then open the Document Manager
- 8. Select the documents to be exported. Use the <Ctrl> button if you need to select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

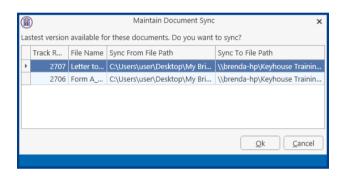


15. Right click on the Keyhouse Framework Sync Button and click Sync

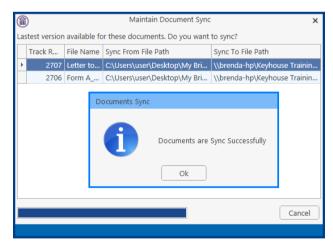


**NOTE**: This icon can be added to the Task Bar by clicking on Customise and setting the Icon to Show Icon and Notifications

16. The following Dialog Box will appear.

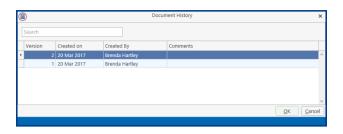


17. Click OK. Only documents that have been changed will be updated by creating a new version of the document. (For information on Version Control see the Word and Outlook Add In Manual)



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.

Case	BLO003/0001	Jack Flynn Road Traffic Accident at Juntion	on M50			
Old	Reference:					
S S	earch	$\otimes$				
5	Folder: All					
Folder	۹ 📂	Document Name	Diary Date 🔻	Track Referen	Version	Document Class
	R	Document Properties	9	453011	1	Document
		Document Text	Э	453012	1	Correspondence
	1 (R)	L Document History		446241	1	Correspondence
		L 🛃 Import New Version		446238	1	Correspondence
	<b>1</b>	L 🚭 Re-classify document(s)		446236	1	Correspondence
		L 🛎 Print document(s)		446233	1	Correspondence
		L Print document(s) as PDF		446232	1	Correspondence
		Convert document(s) to PDF		446231	1	Correspondence
		E-mail document(s)		446230	1	Correspondence
		L E-mail original document(s) as PDF	ins	446229	1	General
		L E-mail document(s) as Password Protected		446228	1	General
		L 📂 Open in Case Diary		446227	1	General
		L 🖆 Copy		446225	1	General
		Copy to another Case		446224	1	General
		Copy path to Clipboard		446223	1	General
		Import Document	•	446222	1	General
		Export Document Letter to Molly Malone	22 Jan 2019	446237		General

3. Locate the document, select and click Open.

1		Open	File					>
€ 🤄 ד ↑ ]	Inis PC → Desktop → Client Documents				~ C	Search Client Docume	ents	P
Organize 🔻 Ne	ew folder					8== -		0
🛞 ShareFile ^	Name	Date modified	Туре	Size				
	Last Will and Testiment for Jack Flynn.pdf	24/02/2020 15:35	Adobe Acrobat D	Ĩ	19 KB			
	File name: Last Will and Testiment for Jack Flyn	n.pdf			~	All Files (*.*)		~
						Open	Cancel	

- 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.

?	1	C	ocument Nan	ne		Diary Date 🔻	Track Referen	Version	Document Class	Source		
		ι	ast Will and T	estiment of Jack Fly	nn	29 Mar 2019	453012		Document	Sent E-mail		
8		(	0			Docum	ent History					
1			9									
			Search									
1		Ŀ	Version	Created on	Created By <sup>9</sup>		Comments					
12				24 Feb 2020	Brenda Hartl		Modified By BH					
1				29 Mar 2019	Darina Galvir							
1												
6		1										
<b>1</b>												
1										OK Cancel		

# 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.

												Keyhouse Case Management (CN - Carol Nolan - 0001 / 07:29)
Home	Case	Report	ts Ph	hone	Lo	g I	Main	tain	Setup Help			
Ľ	#	0		R		ollo-		5	١	Ö		
New Item - Actions	Print 👻	Capti	ure Gei		ite ( cumi		lete	Actio	n Start Timer Po Accounts			
<u> C</u> lient/0	Case		Cas	e: A	BAG	001/0	001		••.	. David Abr Family Lav		
📘 Case Diary										runny cu	•	
🖉 Document I				S	S	bearch						
Scurrent Clie			Action	C	. A	P	D	A	Date	Time	Handler	Synopsis
Extra Case			on	Ħ		9 1			19 May 2016	17:16	MW	Title Documents
Associates				•					19 Jun 2014	11:41	BS	Invoice No:230
<ol> <li>Critical Info</li> </ol>	rmation			•					19 May 2014	16:32	BS	Letter from Accountant
촼 Know Your	Client			•					01 May 2014	23:54	BS	Invoice No:229
📓 A/c Ledger				•	1	<u>م</u>			01 May 2014	22:29	BS	Email From:keyhousedemo@gmail.com - Mobile Call to Brian Sweeney
🖉 Time Ledge				•	1	<u>ی</u>			01 May 2014	12:30	BS	Email From:brian@keyhouse.ie - Practice Management Review Age
📓 Debt Ledge	er			•	1	۵			01 May 2014	00:00	BS	Email To: - Financial Trends for the Econo
Reserve Let				•	٢	6			27 Feb 2014	09:01	BS	David Abrahams
Undertakin	gs			•	1				27 Feb 2014	07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for Key Performa
E Strong Roo	om			•					16 Jul 2013	15:54	BS	Letter to Solicitor re title Letter to Allsop & Browne
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	m	~~~		~~~		m		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	mm	m	m	

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

۲				Keyhouse Case Management (CN - Carol Nolar -	0001/0729)	(	Quick Search (Ctrl + Q)	- 8 ×
Home Case Reports	Phone Log	Maintain Setup Help						
Print - Add Edit Delete								
🙏 Client/Case ∎ Case Diary	Case: ABAD	01/0001	David Abrahams Family Law					I: 01-290222 :: AM
Ø Document Manager	Search						Standard Vie	iew 📃
Surrent Client Details Current Case Details	Attn	Date	Туре	Who	Value	Details	Discharge	Prev
Extra Case Details	•							^ IEW
Associates Critical Information								
A/c Ledger Time Ledger Debt Ledger								
Reserve Ledger		_						
muncas Room	1. M	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~			man with the second	man have been have		~~~

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.	General Extra Not	es	Add Uno	Jertaking		×
		Client :			Add as Comme	nt to Ledger	Needs Attention
Date:	This is the actual date	Matter : Date	Landlord Dispute 19 Apr 2016	Y	Diary Warning Date	19 Apr 2016	×
	of the undertaking.	Туре		Given or Received		Commercial or Non-	
		O Financial Authorised Fee Earr	O Documents	Given	O Received	Commercial	O Non-Commercial
	Click the <b>button</b> to	Undertaking To	Select undertaking to		¥ X		
	select a date from the	Who	Enter who				
	calendar.	Details	Enter details				
Diary Warning Date:	This is the date the	Cetans	Enter details				
Dialy warning Date.		Value	0.00		Dealing Number	Enter dealing number	
	Undertaking Action	Status	Select status	V	Category	Select Category	~
	will appear on the Fee	Conditional	Enter condition				
	Earners Task List as a						
	To Do Item. This will						
	default to a system						QK <u>C</u> ancel
	warning date to amend o	lick on t	he <b>down</b>	arrow to	viowa	calondar	and select
	a date.		ne uown		view a	calential	and select
	a uale.						
Туре:	Check the appropriate b	utton foi	r the type	of under	taking i	.e. Finan	<b>cial</b> or
	Documents.				-		
Given or Received:	Select whether the unde	rtaking l	has been <b>g</b>	given by y	ou or I	received	by you.
Commercial:	Select whether the unde	rtaking i	s <b>comme</b> i	r <b>cial</b> or <b>n</b> c	on-com	mercial	
Authorised by FE:	Click on the down arrow	to selec	t the relev	vant Fee B	Earner	against th	ne
	undertaking.						
Undertaking to:	Click on the down arrow	to selec	t the relev	vant Case	to who	om the ur	ndertaking
-	is been given or received	Ι.					-
	-						
Who:	This will <b>default</b> to the se	elected c	case assoc	late.			
Details:	Input a description of the	is undert	aking.				
Value:	Input the amount the un	Idertakir	ng is for.				
Status:	Click on the down arrow	and sele	ect the red	quired sta	itus.		
Dealing Number:	Input the dealing numbe	er					

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

Home Case Reports	Phone Log	Maintain Setup Help		Keyhouse Case Management (CN - Carel Nolan - )	2001 / 07:29)	Quict	k Search (Ctrl + Q) – 🗗
Print - Add Edit Delet	Discharge						
Client/Case	Case: ABA0	01/0001	. David Abrahams Family Law				Tel: 01-2902 F/e: AM
Document Manager	Search						Standard View 📰
Current Client Details Current Case Details	Attn	Date	Туре	Who	Value	Details	Discharge
Extra Case Details	•						^
Associates Critical Information Know Your Client							
A/c Ledger Time Ledger Debt Ledger Reserve Ledger							
Undertakings							

It will also be inserted as a **task** in the case diary assigned to the selected fee earned dated with the warning date set.

	S	Sea	rch				]		
Action	C	A	P	D	A	Date	Time	Handler	Synopsis
on	₽	6				02 Nov 2015	17:22	CN	Photo Id
	<mark>⊪</mark> ¥				0	02 Nov 2015	17:16	CN	Letter to Client
	Ħ	•	1			27 Jun 2014	11:19	CN	Undertaking changed by BRIANS
	•					19 Jun 2014	11:41	BS	Invoice No:230
$\sim$	`~	~~,	~	~	~	marken	where we have	maan	more thank the second

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.

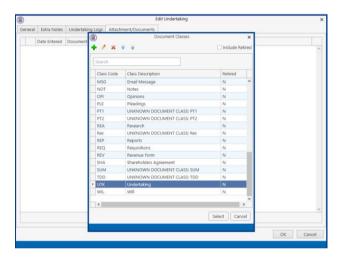
٢			Edi	t Undertaking		×
General	Extra Notes	Undertaking Logs	Attachment/Documents			
Client :				Add as Comme	nt to Ledger	Needs Attention
Matter :		Sale of 10 Rose Lawn	Blanchardstown, Dublin 17			
Date		22 Jun 2016		Diary Warning Date	22 Jun 2016	×
Туре			Commercial or No	n-Commercial	Given or Received	
	O Financial	<ul> <li>Document</li> </ul>	s O Commercial	Non-Commercial	Given	O Received
Authoris	ed Fee Earner	Carol Nolan		~		
Undertak	king To	Liam Jones		▼ X		
Who		Liam Jones				
Details		Forward Deeds				
Value		0.00		Dealing Number	Enter dealing number	
Status		Select status		✓ Category	Select Category	~
Condi	itional	Enter condition				
						<u>O</u> K <u>C</u> ancel

#### 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.

							Edit Unde	rtaking			×
Ger	neral	Extra Notes	Underta	king Logs	Attachn	nent/Docum	ents				
		Date Entered	Documer	nt		Versio	n Doc Class	Track	File Path		
											^
				Add	• 🔹	Attachme					
				Edit	- 6	Link to Fo					
			-	Delete	Ē						
				Cut							
				Сору							
				Paste							
			0	History							
											~
										QK	ancel

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.

dra Notes	the destable states and					
and Notes	Undertaking Logs	Attachment/	Documents			
e Entered	Document		Version	Doc Class	Track	File Path
un 2016	Undertaking to Forw	ard Deeds	1	Undertaking	2674	t:\keyhouse\client documents\FLY001\0001\Undertakin

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

0					Keyhouse Case Management (CN - Car	l Nolan - 00:01 / 07:29 )		Quick Search (Ctrl + Q) - 5
Home Case Reports	s Phone Log	) Maintain Setup H	lelp					
Print - Add Edit Delety Underskings								
Client/Case Case Diary	Case: ABAO	01/0001	David Abrahams Family Law					Tel: 01-2902 F/e: AM
Document Manager	Search							Standard View
Current Client Details Current Case Details	Attn	Date	Type		Who	Value	Details	Discharge
Extra Case Details			Documents		Peter D. Jones & Co.			Discharge ^
Associates Critical Information Know Your Client				Add Edit Delete				
V/c Ledger Time Ledger Debt Ledger				Discharge Output Grid List To	•			
Reserve Ledger Undertakings Strong Room								
-			·····	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	mm	American	man have have	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~

- 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.

0		Discharg	e Undertaking		
General Extra Notes	Undertaking Logs				
Client :			Add as Comme	nt to Ledger	Needs Attentio
Matter :	Family Law				
Date	27 Jun 2014		<ul> <li>Diary Warning Date</li> </ul>	e 19 Apr 2016	
Туре		Given or Received		Commercial or Non-	Commercial
○ Financial	Documents	O Given	Received	Commercial	Non-Commercial
Authorised Fee Earner				]	
Undertaking To	Select undertaking to		× x		
Who	Peter D. Jones & Co.				
Details	Title Documents				
Value	0.00		Dealing Number	Enter dealing number	
Status	Pre Registration		Category	Select Category	
Conditional	Enter condition			Server energery	
Discharge Date	19 Apr 2016		~		
Discharge Description					

- 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.

Add Edit Disch Underskings	10													Standard View 🕇	l nu tu
arch/Open	Search														
itters	Attn	Matter Ref	Client	Matter	Undertaking	Undertaking	Discharge Date	Authorised By			For Who			Discharge Descripti	Description
tters	•	BAR001/0002	Tony Barry		First Active - Undertaking re Sa			Carol Nolan	245400.00		First Active	NA	721 Given	<u>^</u>	The second se
Matters		BIL001/0001	Noel Billing		VHI - Refund medical expenses		21 Sep 2011	Justin Phelan	105000.00			NA	722 Given		Undertaking changed by BRIANS Date: 10/03/2009
5	10	DEV001/0001	Noel Devlin		MBNA - repay credit card debt			Stephen Keogh	15124.26		MBNA credit		723 Given		Type: Financial
tes ed Search		DOH001/0005	Frank Doherty		Employment contract held	17 Sep 2011		Martina Winte	0.00		Stone & Co r	NA	724 Given		Given
ed search sices	-	CAM001/0001	Tony & Marie		NIB - return title deeds if sale n		30 Apr 2010	Carol Nolan	0.00		NIB Sale Proc		725 Given		Authorised By: CN Carol Nolan
ques	-	CAM001/0002	Tony & Marie		Discharge balance of purchase		16 Feb 2012	Justin Phelan	202000.00		ESB Discharg		728 Given		Undertaking to: First Active plc(First
dues	-	CAM001/0001	Tony & Marie		Redeem Mortgage to BOI	08 Apr 2010	16 Feb 2012	Justin Phelan	238342.50		BOI Redeem		729 Given		Active)
dertakings		DEM001/0002			Pay Church & General - Insuran		03 Apr 2009	Brian Sweeney	25500.00		Church & Gen		730 Given		Details: First Active - Undertaking re of 17 Dourlas Road Smithfield Dublin
Room	-	FOX001/0001	Jennifer Fox		AlB personal loan	24 May 2010		Martina Winte	45000.00		AIB personal L.	NA	732 Given		redeem mortgage
nt Search		PUR001/0001	Mick Purcell		To furnish orginal life policy do			Brian Sweeney	0.00		AIB		733 Given		Comment First Active
te Library	1	KEL001/0001	Mary Keller		Contact: €85,000 to be paid fro			Stephen Keogh	85000.00		AIB	NA	734 Given		Value: 245400
		LYN001/0001	Roger Lynch		Redeem credit card debit	15 Jan 2009	22 Mar 2009	Justin Phelan	7891.00		MBNA Credit		760 Given		Status: NA
		LVN001/0001	Roger Lynch		Repay loan out of sale proceeds		22 Mar 2009	Justin Phelan	12134.67		Crumlin & Dis		761 Given		Dealing Number: TB2/98011
		LYN001/0001	Roger Lynch		Pay loan and overdraft from sa		22 Mar 2009	Justin Phelan	3852.65		AIB		762 Given		
	12	LYN001/0001	Roger Lynch		repay car loan out of sale proc		16 May 2009	Justin Phelan	23548.67		GE Money	NA	763 Given		R. L. P. C I
	-	ODW001/0001	Sean O'Dwyer		Discharge stamp duty on remo			Justin Phelan	15000.00		Revenue Com		764 Given		Undertaking Created: Date: 10/03/2009
		ODW001/0001	Sean O'Dwyer	Re-mortgage	Discharge Tax Liability for 2007	25 Nov 2010		Justin Phelan	24000.00	F	Collector Gen		765 Given		Type: Financial
	-	OWE001/0001	Peter Owen	Work Injury	Return Mortgage Document to		22 Dec 2010	Brian Sweeney	0.00		AIB		0 Given		Given
	12	OWE001/0001	Peter Owen	Work Injury	Discharge stamp duty on com	28 Oct 2010	03 Dec 2010	Stephen Keogh	9500.00		Revenue Com		776 Given		Authorised By: CN Carol Nolan
		QUI003/0001	John Quigley	RTA 30th Sept	Return Insurance monies includ	31 Dec 2011		Martina Winte	10525.00	F	Eagle Star		778 Given		Undertaking to:
		TRA001/0001	Ken Traynor	Management	test	04 Oct 2011		Stephen Keogh	0.00	D	AIB		789 Given		Details: First Active - Undertaking re S
		AB8001/0001	George J Abb	Sale 45 Soms	Title Deeds	19 Oct 2011	04 May 2011	Brian Sweeney	600000.00	D	First Active	Pre R	795 Given		of 17 Douglas Road Smithfield Dublin
	12	BUT001/0002	Noel Butler	Lease Agree	Title Deeds	30 Nov 2011		Brian Sweeney	200000.00	D	EBS Bray	Pre R	826 Given		redeem mortgage Comment Problem with title monies in
		KE0003/0002	Sam Keogh	RTA	test	20 Oct 2011		Brian Sweeney	0.00	D	test		849 Given		client a/c
		BEC001/0001	Angela Beck	Sale of 56 Ch	Title Deeds	10 Nov 2010		Brian Sweeney	600000.00	F	First Active	Pre R	889 Given		Value: 245400
		BAR001/0002	Tony Barry	Purchase 23 L	Title Deeds	31 Jan 2012	31 Jan 2012	Justin Phelan	0.00	D	First Active		973 Given		Status: NA
		BES001/0001	Business Time	Lease of Unit	Title Deeds	12 Jul 2011		Brian Sweeney	670000.00	D	First Active	Pre R	1203 Recei		Dealing Number: TB2/98011
		ABA001/0001	David Abraha	Family Law	Title Documents	27 Jun 2014		Martina Winte	0.00	D	Peter D. Jone	Pre R	1388 Recei		
		TOB001/0001	Avril Tobin	Sale of The C	Title Deeds	01 Dec 2011		Brian Sweeney	300000.00	F	Trustee Savin	Pre R	1412 Given		
		LAW001/0001	Liz Lawlor	Advice re Inhe	Tityle Deeds	02 Feb 2012		Brian Sweeney	300000.00	D	EBS Bray	Pre R	1555 Given		
	15	BLO001/0004	Joe Bloggs	Commerical	Title Deeds	14 Feb 2012		Martina Winte	0.00	D	Dun Laoghair		1562 Given		
		CLI001/0001	Bill Clinton	Unfair dismiss	overdraft	15 Mar 2012		Martina Winte	6750.00	F	National Irish		1609 Given		
Tasks		A68001/0001	George J Abb	Sale 45 Soms	Title Deeds	27 Feb 2015		Brian Sweeney	450000.00	D	First Active pl	Pre R	2931 Given		
earch/Open		DEA001/0002	James Deane	Sale 56 Green	Title Deeds	21 Feb 2015		Brian Sweeney	350000.00	D	First Active pl	Pre R.,	2932 Recei		
Client/Case			Count : 39											15	

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.

	Attn	Matter Ref	Client		Matter	Undertaking		
Þ		FLY001/0001	Jack Flynn	0	Add	asdfasd		
				0	Edit			
				0	Discharge			
				<b>1</b>	Add Document			
					Open Action			
					Go To Case Diary			

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.**

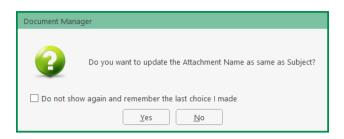
			Search
Τ	Retired	Class Description	Class Code
	N	Instruction Sheets	INS
	N	Letters/Interparty Correspondance	LTR
	N	Medical Reports	MED
	N	Memo	MEM
	N	Motion papers	MOT
	N	Email Message	MSG
	N	Notes	NOT
	N	Opinions	OPI
	N	Pleadings	PLE
	N	Research	REA
	N	Reports	REP
	N	Requisitions	REQ
	N	Revenue Form	REV
	N	Shareholders Agreement	SHA
	N	Undertaking	UTK
	N	Will	WIL

- 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.

tem • form	Partners Generate Co Documen	mplete	5	Start Timer Pi Account					
Client/Case	Case: FLY00	1/0001		• •	Jack Flyn Sale of 1		Blanchardstown, Dublin 17		Tel: 01- F/e: CN
ocument Manager	Sea	rch						Standard	View
urrent Client Details	C A.	P D	. A	Date	Time	Handler	Synopsis	Action Co	o F
urrent Case Details tra Case Details	ion			09 May 2016	15:11	CN	Will of JV Flynn 5 May 2016		P
sociates				09 May 2016	15:08	CN	Will of Jane Hynn dated 6 May 2016		P
tical Information				09 May 2016	15:06	CN	Will of Jack Flynn dated 5 May 2016		P
ow Your Client				09 May 2016	00:00	CN	Accountable Trust Receipt	ADMAT	P
ked Cases	#		÷	06 May 2016	14:08	CN	Salutation	G200	P
Ledger				29 Apr 2016	15:40	CN	Forward funds o Document Properties 🗙	ADMUD	1
ne Ledger		1		30 Mar 2016	10:21	CN	Review File file for	G16	P
ot Ledger				08 Mar 2016	15:16	BS	Ur to Client File Information	TDOC	8
serve Ledger				08 Mar 2016	15:15	BS	Affidavit of Debt Document Name: sharpscanner@keyhouseie_20120224	TDOC	F
dertakings		1		19 Feb 2016	15:41	AM	Review File Document Date: 09 May 2016 V	G16	8
ong Room	۲.			23 Mar 2016	10:21	CN	Letter to Client Document Class: Undertaking	G02	P
	۲.			23 Mar 2016	10:21	CN	Letter to Solicito Document Type: PDF	G03	P
	۲.			12 Feb 2016	16:01	CN	Letter to Lending	G04	P
				12 Feb 2016	15:44	CN	Letter to Client OK Cancel	G02	P
	٢.			08 Feb 2016	15:41	CN	Letter to Solicito	G03	P
	5 25			05 Feb 2016	16:00	CN	Meeting	G27	F
	<b>S</b>			03 Feb 2016	15:38	CN	Letter to Client	G02	P
	۲.			01 Feb 2016	15:50	CN	Letter to Client	G02	P
	S 9			25 Jan 2016	16:00	CN	Court Date	G26	P
	6			18 Jan 2016	16:01	CN	Attendance Sheet7	G20	P
				30 Dec 2015	16:02	CN	Letter to Dodor ?	G08	P
	Ĺ	hmen	_		16:02	CN	Letter to Dodor?	G08 Standard View	
	Type	2 Doc	ument				Version Date Document Class		
Tasks				ner@keyhouse.	ie_20120224		1 09 May 2016 Undertaking		
Search/Open									

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**.

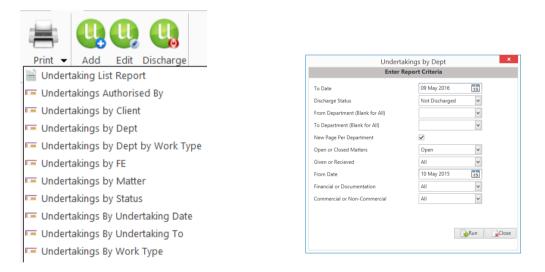


#### **Undertaking Reports**

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.

ree x											
dertakings By Dept						oit & Runne					
						ort By Departm	ent		5/05/2016:17:03 Dept From: : To:		
					n 01/01/2010	: To 09/05/2016		Disc	harge Status: All Matter Status: All		
	Dept	Matter	Undertakin Date	<sup>IG</sup> Type	Auth.By	Dealing Number	Given Rec	Status	Value		
	COM	Commercial									
	BE 5001 BS	Business Time Limited BE\$001/0001 Lease of Unit 33, Eastgate Avenue, D		Document For : First Active	BS	6788F		Pre Registration Not Discharged To: First Active plc	670,000.00		
	BLO001	Joe Bloggs		Title Deeds							
	SK	BL0001/0004 Commerical Work	14/02/2012	Document For : Dun Laogh Title Deeds	MW haire Rathdow	n County Council	Given	Not Discharged To: Dun Laoghaire Rathdown Court	0.00		
	LAW001	Liz Lawlor								1	
	BS	LAW001/0001 Advice re Inheritance tax	02/02/2012	Document For : EBS Bray Tityle Deeds	BS		Given	Pre Registration Not Discharged To: Educational Building Society	300,000.00		
	PUR001 BS	Mick Purcell PUR001/0001	12/05/2010	Document	BS		Given	Not Discharged	0.00		
		Lease renewal - rent review reduction		For : AIB		cuments to be received		To: AIB			
	BUT001	Noel Butler									
	JP	BUT001/0002 Lease Agreement - Unit 2, Green Bus		Document For : EBS Bray Title Deeds	BS	F567777	Given	Pre Registration Not Discharged To: Educational Building Society	200,000.00		
					Phythousa Lagur IT	Specialitist www.kayfocusa.ac			Page 1 of 8		

- 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 *PPF* to open in Adobe.
  - Click on XLS **LizxLs** 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.

Enter Re	
	port Criteria
To Date	09 May 2016
Discharge Status	Not Discharged 🗸
From Client Code (Blank for All)	FLY001 🗸
New Page Per Client	$\checkmark$
Open or Closed Matters	Open 🗸
Given or Recieved	All
From Date	10 May 2015
Financial or Documentation	All
Commercial or Non-Commercial	All
To Client Code (Blank for all)	<b>v</b>

- 7. Set the required **parameters** and run the report.
- 8. Click on **print** or click on one of the following options available on the report toolbar:
  - Click on Doc to open a copy to Word
  - Click on PDF
  - Click on XLS to open a copy in Excel.

# How to view Critical Information and Print Reports

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

Home Case Reports	Phone Log Maintain Setup	Нер		Ke	yhouse Case Mana	gement	(BH - Brenda Har	iwy - 00:00 / 00:00 )				Quick Search (Ctrl	+ Q) -	- ×
Print - Start Timer Post Time														
🙏 Client/Case	Case: BLA001/0001	Gordo RTA W	on T. Black Valkinstown Crossroads, G. Black										Tel: 0 F/e: B	01 4766666 BS
Case Diary Document Manager	No comment is available for th	s matter.												^
🍮 Current Case Details	Show Alert													
Extra Case Details Associates	Account Summary				Current Matter	Details								
Critical Information	Debtors A/c	147.35	4 Years, 6 Months and 1 Da	ay O/s		08 May 2	010 File C	olour						
🔹 Know Your Client	Outlay A/c	3,336.61		rs O/s	Fee Earner	Brian Swe	eney Statut	e Date 25 P	vlar 2015					
A/c Ledger	Outlay Budget	0.00			Case Status		Who	Date	Descriptio	00				
Time Ledger Debt Ledger	Current Outstanding Fees	121.78			Last Action		3H	15 Feb 2017	Letter to Ba					
Reserve Ledger	Client A/c	0.02			Last Milestone									
Undertakings	Client Current	0.02			Next Action		35	04 Mar 2015	Prepare Pa	pers for Counsel.				
Strong Room	Client Deposit	0.00			Last Record Tim		VIK	16 Jul 2014	Attendance	-				
	Current Locked Up Value	8,531.73	Percentage Of Estimated Fee	_										
	Total Work In Progress	5,047.77		6.31%	Outstanding Cri	itical Date	25							
	Write Off Time	0.00			Date V	Vho Sta	tus Descrip	tion						
	Fees Issued To Date	60,635.00		5.79%	14 Mar 2016	CN [	Critical I	Date						
	Fees To Date + WIP	65,682.77		2.10%	He destable as									
	Estimate Fees	80000.00	Section 68 Estimate given	6.31%	Undertakings Description	Valu		Who (	Siven/Received	1				
	Draft Invoices	0.00			provide proof o	_	_		Siven					
	Last Bill Date	02 May 2012			provide proor o		THECHT	P DOBLINE   V	Silvell					- 1
	Expected Bill Date	Y												
	Current Profit/Loss	54,487.23												
	Possible Value To The Client	0.00												
	Anti Money Laundering checked	∠ Approve	l.											
Tasks	Time By F/e	Work in Progra		Total Time										
Search/Open	Stephen Keogh Brian Sweeney	6:41 5:25	1,545.67	6:4			,545.67							
Client/Case	Martina Winters	4:55	1,319.30		5		,919.50							
	Carol Nolan	4:00			0		,000.00							
Time Costing	Carol Nolan	4:00	1,000.00	4:0	0	1	,000.00							

Print 👻

# 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; <b>amend</b> if required <b>Set</b> the <b>date</b> parameters <b>Tick</b> the items you want included e.g. Emails, attachments etc. Click <b>Run</b>	<ul> <li>Activity Report</li> <li>Summary Report</li> <li>Matter Label</li> <li>Client Label</li> </ul>
Summary Report:	Click on Case Summary Report The current case code will appear <b>amend</b> if required. Then click <b>Run.</b>	
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.

Home Case Reports	Partners Phone Log Mattitian Setup Help	Ribbons	Keyh	ouse Case Management	(CN - Carol Nolan -	20:00 / 00:00)				Guick Search (Ctrl + Q)	
ew item - Actions		Case Bo	1	VIS Word Workshi Compare	Column	Headin	gs			Preview Pane	
Client/Case Case Diary Document Manager	Case: ABA001/0001	Search box			7/			) Standard Vi	ew 📼	Tet: 01-290 F/e: CN Letter rem g Lender to	
Surrent Client Details	Type 🕴 Document Name	Diary Date - Version	Date	Document Class	Source	From	To	Subject	Tra		
Current Case Details	B     Letter reminding Lender to send Title	04 May 2016 1	04 May 2016	Correspondance	Case	1		Remind Lender to send Title	^	ABA001/0001/CN/GCU	
Extra Case Details Associates	E Letter to Solicitor re Pleading	04 May 2016 1 0	04 May 2016	Letters/Interparty Corr	Case			Letter to Solicitor re Pleading			
Critical Information	E Letter from Accountant	19 May 2014 1	19 May 2014	Client Letters	Captured			Letter from Accountant		04 May 2016	
Know Your Client	Mobile Call to Brian Sweeney	01 May 2014 1	01 May 2014	General	Received E-m	keyhousedem	stephen@key_	Mobile Call to Brian Sweeney			
A/c Ledger		01 May 2014 1	01 May 2014	General	Received E-m	brian@keyho	'keyhousede	Practice Management Review Agenda		Kilkenny	
Time Ledger	Navigation panel	01 May 2014 1 01 May 2014		General	Received From	heineline	'keyhousede	Practice Management Review Agenda		5 Main Street	
Debt Ledger		01 May 2014 1	01 May 2014	Gen			'keyhousede	Practice Management Review Agenda		Kilkenny	
Reserve Ledger	14101-Trends-Report-Final.docx	01 May 2014 1	01 May 2014	DOC	ument L	.ist		Financial Trends for the Economy	Co. Kilkenny		
Undertakings	image001	01 May 2014 1		General		)		Financial Trends for the Economy			
Strong Room	😰 🕴 Financial Trends for the Economy	01 May 2014 1	01 May 2014	General	Received E-m			Financial Trends for the Economy		10110 Jack 10	
A A CONTRACTOR	Key Performance Indicators	27 Feb 2014 1	27 Feb 2014	General	Sent E-mail	brian@keyho	brian@keyho	Sample Report for Key Performance Indicators		RE: Our Clients David Abrahams Premises: aerrgaert	
	Sample Report for Key Performance Indicators	27 Feb 2014 1	27 Feb 2014	General	Sent E-mail	brian@keyho	brian@keyho	Sample Report for Key Performance Indicators		Loan No. aertaer	
	Letter to Allsop & Browne	16 Jul 2013 1	16 Jul 2013	Correspondance	Case			Letter to Solicitor re title Letter to Allsop & Brow		15-12-2000 m 1200 m 1200 m 1200 m	
	Accountants Letter	09 May 2013 1 0	07 May 2013	Letters/Interparty Corr	Captured			Accountants Letter			

Window area	Description
Case Box	Input the case reference in this box or click the browse button and search for
	the required case.
Column	Click the column headings to sort the list of documents by name, version, diary
Headings	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	Print
<b>I</b> Properties	Show document properties
Reclassify	Reclassify: change the document class
Email	Click to email current document
Capture	Capture documents from a scan folder
Compile Brief	Compile Brief: If no Brief currently exists, this button launches the <b>Brief Wizard</b> . If there is an existing Brief, this button opens the existing Brief in the <b>Brief Maintenance</b> window



Use the down arrow to select the PDF Viewer to be used.

₩ ₩ → ← MS Word → ← Workshare

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.

0							Keyhouse Case Management (CN - Carol Nolan - 0001 / 07.20)			Quick Search (Ctrl + Q)	×
Home Case Reports	Phone Lo	g Main	ntain	Setup Help							
Vew Item • Actions Capture	e Generate Docum			-							
Client/Case	Case: FLYC	01/0001								Tel: 01-56	69 741
Case Diary					Sale of	10 Rose Lawn	Blanchardstown, Dublin 17			F/e: CN	
Document Manager	8	earch						Standard	liew 📃	Preview	
Current Client Details	A C. 4	P D.	. A.,	Date	Time	Handler	Synopsis	Action Co	F	Letter to Client	
Extra Case Details	9	1		19 Feb 2016	15:41	CN	Review File	G16	P	Preview Document	
Associates	3			12 Feb 2016	16:01	CN	Letter to Lending Institution	G04	P	FLY001/0001/CN/AM	
Oritical Information	<b>~</b>		1	12 Feb 2016	15:44	CN	Letter to Client	G02	1	FLY001/0001/CN/AM	- í
👌 Know Your Client	۲.			08 Feb 2016	15:41	CN	Letter to Solicitor	G03	P		
🛱 A/c Ledger	🥑 🛙	5		05 Feb 2016	16:00	CN	Meeting	G27	P	12 February 2015	
Time Ledger	•			03 Feb 2016	15:38	CN	Letter to Client	G02	P		
Debt Ledger	3			01 Feb 2016	15:50	CN	Letter to Client	G02	P	Jack Flynn	
Reserve Ledger	۰ ک	P		25 Jan 2016	16:00	CN	Court Date	G26	P	10 Rose Lawn	
Undertakings	3			18 Jan 2016	16:01	CN	Attendance Sheet?	G20	P	Blanchardstown	
				30 Dec 2015	16:02	CN	Letter to Doctor ?	G08	P	Dublin 17	

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

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

S b	ased AND income 😵										
	Folder: All										
		9		<b>7</b>	Document Name						
	Application for Income Protection										

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

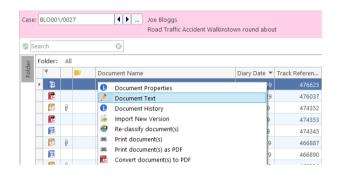
5	bas	ed OR	inco	me	$\otimes$	
	F	older:	All			
		٩		1	Document Name	Diary Date 🔻
	Þ	R			Application for Income Protection	28 Jan 2020
					Protection Plan	28 Jan 2020

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

Document Text	-	$\times$
Below is the text that was previously extracted from and/or entered against this document.		
You can modify this text to enter terms or phrases that will help other people find this document.		
File: Letter to Bloggs _ Co re Medical Report_2765.docx		
	Fetch Text	
	Bloggs & Co	
	1 Main Street,	
	Naas Co Kildare	
	24 January 2020	
	Our ref: FLY001/0001/CN/bh	
	Your ref:	
	Re: Road Traffic Accident at Junction 9 on M50	
Save	•	_

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

Document Text	-	C
Below is the text that was previously extracted from and/or entered against this document.		
You can modify this text to enter terms or phrases that will help other people find this document.		
File: Letter to Bloggs _ Co re Medical Report_2765.docx		
	Fetch Text	
Bloggs & Co 1 Main Street.		
Naas		
Co Kildare	Bloggs & Co	
	1 Main Street, Naas	
24 January 2020	Co Kildare	
Our ref: FLY001/0001/CN/bh Your ref:		
NUM TEN	24 January 2020	
Re: Road Traffic Accident at Junction 9 on M50	Our ref: FLY001/0001/CN/bh	
	Your ref:	
Dear Sirs	Re: Road Traffic Accident at Junction 9 on M50	
		6
		_

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.

(ii) Document Text	- 0
Below is the text that was previously extracted from and/or entered against this document	
You can modify this text to enter terms or phrases that will help other people find this doc	
	ument
ile: Application for Income Protection_2769.PDF	
Application for Income Protection based on an income of €50,000	Fetch Text
	⊖⊕ (auto) % 🛄
	Friends First
	APPET RE Accountry Arrange
	PTGLAS. Zonot Ora
	Hardweller (E. 2000) E. 2010 (2010) Complexities and an excitation of the second se
	*/ ** *
	Parton Tartat P a Available Straight C
	NAME STOCKS MANAGEMENT CONTRACTOR
	March A. Canada H. Sandar
	marries on one of the second s
	Non-constructional properties report and the formation of the last second sector of the sector of th
	SUBJECT MEDICINES
	Monty series - April and and a start of the Advertised of the series
	Namesyn Bacatan is Sprawlar
	Industries No. So. of
	Rest Large Law Last South of a Summer Part
	Pagent Aprilian Ballis Bartis / Bartary Prints

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.

Case: Bl	LA001/0001	Gordon T. Black			Tel: 01 4766666
		RTA Walkinstown Crossr	oads, G.	Black	F/e: BS
Searc	ch	$\bigotimes$			Standard View 🗕 🔲 Preview
	2	Document Name	Vers	View	iew
▶ 12		Letter to Client		Standard View	
		Financial Statement Audit		By Document Class	
				By Document Types	
		Medical Report_2619		Email Received	
		Chase 1st Defendant		Emails	
		Chase letter to Garda		Exclude Dictations	
		Chase Letter to Doctor re medical report		Shared Documents	
		Letter to Lending Institution			
		Letter to Solicitor			
		Letter to Solicitor			

- 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**.

Ca	ase: T.	IF00	1/0001 <b>()</b> TJ Fox								
			Outstanding debt	to PTSB Bank.							
5			🚫 🗌 Search text								Standard View
	Туре	Ŷ	Document Name	Diary Date	Version	Date <	Document Class	Source	From	То	Subject
	2	0	Test Attachment	16 Jul 2015	1	16 Jul 2015	General	Sent E-mail	brenda@keyh	training TT. tr	Test Attachment ^
	P		Precendent Document	14 Jul 2015	1	14 Jul 2015	Pleadings	Case			Precedent Document
₽	(Me		Attendance Log	14 Jul 2015	1	14 Jul 2015	Reports	Case			Attendance Sheet
	P		Vendor Instruction Sheet	14 Jul 2015	1	14 Jul 2015	General	Case			Create Vendor Instruction Sheet
	M		Document2_2661_2662	13 Jul 2015	1	13 Jul 2015	General	Case			Document2_2661_2662
	2	0	Outgoing Email.	13 Jul 2015	1	13 Jul 2015	General	Sent E-mail	training@keyh	Brenda Hartley	Outgoing Email.
	2	0	Outgoing Email with an Attachment	13 Jul 2015	1	13 Jul 2015	General	Sent E-mail	training@keyh	Brenda Hartley	Outgoing Email with an Attachment
	P		Letter to Lending Institution confirming appoint	06 Jul 2015	3	13 Jul 2015	Letters/Interparty Corr	Case			Letter to Lending Institution confirmal
	1		Conflict Search_2639	13 Jul 2015	1	06 Jul 2015	General	Sent E-mail	training@keyh	Brenda Hartley	Outgoing Email.
	P		Attendance for Introductory Meeting_2634	13 Jul 2015	1	06 Jul 2015	General	Sent E-mail	training@keyh	Brenda Hartley	Outgoing Email with an Attachment

#### How to Filter Columns

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

Document Class <sup>9</sup> 📐 🏼 🔺

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

Case:	BLAO	01/0001	4	_	Black town Crossroa	ds, G. Black	k						Tel: 01 476 F/e: BS
Sea	irch		$\otimes$									Stand	dard View 🛛 🖶 📃
		<b>&gt;</b>	Document Name			Version	Diary Date 🔻	Date	Document Class	Sou	irce	From	То
1			Letter to Client			1	24 Jan 2020	21 Jan 2020	Client Letters	Cas	e		^
R			Medical Report_2							□ ×	tured		
F			Civil Bill (CC) RTA	Search:							eived E-m	Brian Sweeney	brian@keyho
	0		Draft Civil Bill	Selected	Code			Descriptio	on		eived E-m	Brian Sweeney	brian@keyho
F			Draft Civil Bill		CLI	Clier	nt Letters				eived E-m		
6	0		Draft Pleadings fr		COS	Corr	respondance				eived E-m		
F			Chase Letter for (		DOC	Doc	uments				2		
E			Chase Ltr for Doc		FRM	Form	n Document				2		
F			Chase 1st Defend		GEN	Gen					2		
F			Chase letter to Ga		LTR		ers/Interparte C	Correspondence	8		2		
F			Chase Letter to D		MED		lical Reports				2		
F			Ltr to Client re M		PLE	Plea	dings				2		
F			Letter to Client				-				2		
F			Letter to Solicitor				Ok Ca	ncel					
ſ			Letter to Solicitor			1	14 Aug 2018	14 Aug 2018	Letters/Interparte C	orr Cas	e		

- 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.

Case	e: BLAO	001/0001	Gordon T. Black RTA Walkinstown Crossroa	ıds, G. Blacl	:						Tel: 01 4 F/e: BS	766666
<b>S</b> S	Search		$\otimes$							Stand	ard View 🛛 🖷 📃	Prev
		<b>2</b>	Document Name	Version	Diary Date 🔻	Date	Document Class 🖣	Ŷ	Clear Filter	ր	То	iew
Þ	12		Letter to Client	1	24 Jan 2020	21 Jan 2020	Client Letters	Ŷ	Clear All Filters			^
	1		Letter to Client	1	14 Aug 2018	14 Aug 2018	Client Letters	-	Case			
	1		Letter to Client re medical appointment	1	03 Mar 2015	04 Jul 2018	Client Letters		Captured			
1	<b>1</b>		Letter re Finance	1	29 Nov 2011	04 Jul 2018	Client Letters		Captured			

#### 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.
- You may amend the Document Name, Date, Document Class or Type. To change the Document Class, select from the dropdown list, which will show the available classes.

Search       Class Code     Class Description       P ATT     Attendance Sheet       CFS     Conflict Search       DOC     Document       ENG     Engagement Letters       GEN     General       LTR     Letters/Interparty Correspondance       MED     Medical Reports       MEM     Memo	×
ATT     Attendance Sheet       CFS     Conflict Search       DOC     Document       ENG     Engagement Letters       GEN     General       LTR     Letters/Interparty Correspondance       MED     Medical Reports       MEM     Memo	
CFS     Conflict Search       DOC     Document       ENG     Engagement Letters       GEN     General       LTR     Letters/Interparty Correspondance       MED     Medical Reports       MEM     Memo	
DOC     Document       ENG     Engagement Letters       GEN     General       LTR     Letters/Interparty Correspondance       MED     Medical Reports       MEM     Memo	^
ENG         Engagement Letters           GEN         General           LTR         Letters/Interparty Correspondance           MED         Medical Reports           MEM         Memo	
GEN     General       LTR     Letters/Interparty Correspondance       MED     Medical Reports       MEM     Memo	
LTR Letters/Interparty Correspondance MED Medical Reports MEM Memo	
MED Medical Reports MEM Memo	
MEM Memo	
Ok Cancel	2

	Document Properties	×
Details File Informa	ation	
Document Name:	letter from hospital consultant	
Document Date:	04 Jul 2011	
Document Class:	Letters/Interparty Correspondance	~
Document Type:	Image	
	Ok Cancel	

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.

0	Document Properties	
<i>!</i>	Document Text	
0	Document History	
<del>@</del>	Re-classify document(s)	
#	Print document(s)	
#	Print document(s) as PDF	
6	Convert document(s) to PDF	
$\bowtie$	E-mail document(s)	
	E-mail document(s) as PDF	
$\bowtie$	E-mail original document(s) and PDF versions	
$\bowtie$	E-mail document(s) as Password Protected PDF	
	Open in Case Diary	
ſ	Сору	
G	Copy to another Case	
ſ	Copy path to Clipboard	
÷	Import Document	۲
<b>F</b>	Export Document	۲

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**.

Case:	FLY	/001/0	001	Jack Flynn Sale of 10 Rose Lawn, B	lanchardstown	, Dublin 17						
Se Se	earch	1		💛 🗌 Search text								Standard View 増 🗾
L.	Fold	der:	All									
Folder	Т	ype	Ø	Document Name	Diary Date	Version	Date 💌	Document Class	Source	From	То	Subject
	F	1		Section 68 Letter	30 Dec 2015	1	24 May 2016	Correspondance	Case			Section 68 Letter
		2		Ltr to Client re serches	30 Mar 2016	1	11 May 2016	Letters/Interparty Corr	Capture			Ltr to Client re serches
		2		Letter to Doctor	10 May 2016	1	10 May 2016	Letters/Interparty Corr	Case			Letter to Doctor
		R		Will of Jack Flynn dated 5 May 2016	30 May 2016	1	09 May 2016	Will	Capture			Will of Jack Flynn dated 5 May 2016
		2		Will of JV Flynn 5 May 2016	09 May 2016	1	09 May 2016	Will	Capture			Will of JV Flynn 5 May 2016
		2		Will of Jane Flynn dated 6 May 2016	09 May 2016	1	09 May 2016	Will	Capture			Will of Jane Flynn dated 6 May 2016
		1		Undertaking to forward funds	29 Apr 2016	1	09 May 2016	Undertaking	Capture			Forward funds on completion of sale.
		8		Letter to Solicitor	23 Mar 2016	1	23 Mar 2016	Letters/Interparty Corr	Case			Letter to Solicitor
		1		Letter to Client	23 Mar 2016	1	23 Mar 2016	Client Letters	Case			Letter to Client
		1		Ltr to Client	08 Mar 2016	1	08 Mar 2016	Letters/Interparty Corr	Capture			Ltr to Client
		1		Affidavit of Debt DMD	08 Mar 2016	1	08 Mar 2016	Documents	Capture			Affidavit of Debt DMD
		R.		Letter to Lending Institution	12 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr	Case			Letter to Lending Institution
		1		Letter to Client	12 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client
		E.		Letter to Solicitor	08 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr	Case			Letter to Solicitor
		1		Letter to Client	03 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client
		E		Letter to Client	01 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client

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

Case: FLY001/0001				Jack Flynn Sale of 10 Rose Lawn, Blanchardstown	, Dublin 17						
Search				😂 🗌 Search text							
Folder 4	Fold	er:	All								
📕 All	T	ype	Ø	Document Name	Diary Date	Version	Date 💌	Document Class	Source	From	То
📕 Documents	F	1		Section 68 Letter	30 Dec 2015	1	24 May 2016	Correspondance	Case		
				Ltr to Client re serches	30 Mar 2016	1	11 May 2016	Letters/Interparty Corr	Capture		
				Letter to Doctor	10 May 2016	1	10 May 2016	Letters/Interparty Corr	Case		
		2		Will of Jack Flynn dated 5 May 2016	30 May 2016	1	09 May 2016	Will	Capture		
		7		Will of JV Flynn 5 May 2016	09 May 2016	1	09 May 2016	Will	Capture		
		1		Will of Jane Flynn dated 6 May 2016	09 May 2016	1	09 May 2016	Will	Capture		
		2		Undertaking to forward funds	29 Apr 2016	1	09 May 2016	Undertaking	Capture		
				Letter to Solicitor	23 Mar 2016	1	23 Mar 2016	Letters/Interparty Corr	Case		
		E.		Letter to Client	23 Mar 2016	1	23 Mar 2016	Client Letters	Case		
				Ltr to Client	08 Mar 2016	1	08 Mar 2016	Letters/Interparty Corr	Capture		
				Affidavit of Debt DMD	08 Mar 2016	1	08 Mar 2016	Documents	Capture		
				Letter to Lending Institution	12 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr	Case		
				Letter to Client	12 Feb 2016	1	12 Feb 2016	Client Letters	Case		
				Letter to Solicitor	08 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr	Case		
		E		Letter to Client	03 Feb 2016	1	12 Feb 2016	Client Letters	Case		
				Letter to Client	01 Feb 2016	1	12 Feb 2016	Client Letters	Case		

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

Case: FLY001/0001	Jack Flynn Sale of 10 Rose Lawn, Blanchardstowr
Search	Search text
Folder #	Folder: Documents
📕 All	Type 🖉 Document Name
Jocuments	
🛨 Add nev	v Sub-folder
🧷 Re-nam	e this folder
📕 Folder C	olour
🗡 Revert to	o the original Case Plan folder structure

- 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.

Fo	lder #	F	older:			
	📕 All		Туре	V	Document Name	Diary Date
4	📕 Documents	)	12		Section 68 Letter	30 Dec 2015
	🔺 📕 Agreements		R		Ltr to Client re serches	30 Mar 2016
	📕 Tennancie	5			Cut and Paste	08 Mar 2016
	📕 Reports		1		Letter to Doctor	10 May 2016
			1		Will of Jack Flynn dated 5 May 2016	30 May 2016
					Will of JV Flynn 5 May 2016	09 May 2016
					Will of Jane Flynn dated 6 May 2016	09 May 2016

# Moving, Linking & Copying Documents in the Folder Structure

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

Alternatively

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

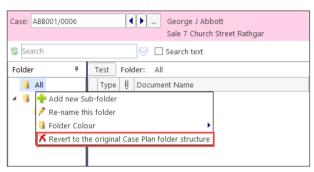
Ca	se:	FLY	001/0001		!		Jack Flynn Sale of 10 Rose Lawn, Blanchardstown, Dubli	n 17		
S	Sea	arch					Bearch text			
Fo	lde	r	4	F	older:	Do	cuments >>> Report			
	1	All			Туре	¥	Document Name	Diary Date	Version	Date
4	1	Do	cuments	Þ			Undertaking to forward funds	29 Apr 2016		09 May 20
	4	h	Agreements		R		Will_of_IV Flynn 5 May 2016	09 May 2016	1	09 May 20
			A Move doc				ane Flynn dated 6 May 2016	09 May 2016	1	09 May 20
		1	Copy docu				ack Flynn dated 5 May 2016	30 May 2016	1	09 May 20
			P Link docum	nent	ts to th	is to	Ider Letter to Solicitor	23 Mar 2016	1	23 Mar 20
					R		Letter to Client	23 Mar 2016	1	23 Mar 20
					R		Ltr to Client	08 Mar 2016	1	08 Mar 201

- 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**

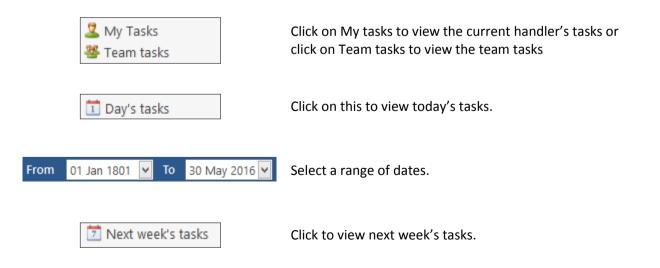
Home Case Reports	5 Phone Log	g Mai	Тоо	lba	r			.ynouse	care management				Call And
w Item - Print Captu Actions Tasks	re Generate C Docume Handler C				Searc	h Bo	ЭХ		]				Preview
My tasks	Search										Standard Vi	ew 🔳	Letter to Lending Institution
Team tasks			Date	Time	Case Code	Handler		From	Client/Case(Matter) Charlie Gleeson	Action	Diary Date	~ 1	×
Day's tasks		: 🗠	04 Nov 2014	19:31	GLE001/0001	CN	сом	CN	Lease of South West Georges Street	Review File	04 Nov 2	P	
vext week's tasks vext month's tasks	<b>B</b>	18-	04 Nov 2014	19:09	GLE001/0001	CN	сом	CN	Charlie Gleeson Lease of South West Georges Street	Letter to Solicitor	04 Nov 2	P	
Overdue tasks	<b>B</b>		04 Nov 2014	19:07	ABA001/0003	CN	сом	CN	David Abrahams Sale of 22 O'Connell Street, Dublin 1	Letter to Lending Institution	04 Nov 2	P	OUR REF YOUR REF DATE
utstanding tasks ast week's tasks		1	04 Nov 2014	18:16	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Review File	04 Nov 2	P	BS.HB.BLA001/0002 04 November 2014
ast month's tasks		1	04 Nov 2014	18:15	BLA001/0002	CN	сом	CN	Gordon T. Black	Review File	04 Nov 2	P	
ll tasks 1y Qverview			04 Nov 2014	17:26	BLA001/0002	CN	сом	CN	Sale of 2 Trinity Close, Rathgar, Du Gordon T. Black	Letter to Lending Institution	04 Nov 2	-	Re: Our Clients - Gordon T. Black Premises - Sale - 2 Trinity Close,
$\square$	B		04 Nov 2014	17:25		CN	сом	CN	Sale of 2 Trinity Close, Rathgar, Du Gordon T. Black	Instruction Received	04 Nov 2		Rathgar, Dublin 6 Loan No 67889990
$ \rightarrow                                   $	***	-			BLA001/0002				Sale of 2 Trinity Close, Rathgar, Du Gordon T. Black			-	Dear Sir/I
Task vie	WC.		04 Nov 2014	17:25	BLA001/0002	CN	сом	CN	Sale of 2 Trinity Close, Rathgar, Du	Letter to Lending Institution	04 Nov 2	P	
Task vie	WS	-	04 Nov 2014	17:24	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Letter to Client ?	04 Nov 2	P	Document
	<b>B6</b>	-	04 Nov 2014	17:24	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Letter to Lending			Preview Pane
	<b>B</b>		04 Nov 2014	17:19	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Initial Letter and Task	list		Preview Palle
	<b>B</b>		04 Nov 2014	17:11	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Letter to Doctor	2		Brian Sweeney Soo Grabbit & Runne
	<b>B</b>		04 Nov 2014	17:03	BLA001/0001	CN	сом	CN	Gordon T. Black RTA Walkinstown Crossroads, G. Bl	Letter to Doctor	04 Nov 2	P	stephen@keyhouse.ie
	<b>B</b>		04 Nov 2014	17:03	BLA001/0001	CN	сом	CN	Gordon T. Black	Letter to Doctor	04 Nov 2	P	
			04 Nov 2014	16:55	BLA001/0001	CN	сом	CN	RTA Walkinstown Crossroads, G. Bl Gordon T. Black	Letter to Solicitor	04 Nov 2		
				16:53				CN	RTA Walkinstown Crossroads, G. Bl Gordon T. Black		04 Nov 2		
			04 Nov 2014		BLA001/0001	CN	сом		RTA Walkinstown Crossroads, G. Bl Gordon T. Black	Letter to Solicitor			
	E C		04 Nov 2014	16:52	BLA001/0001	CN	сом	CN	RTA Walkinstown Crossroads, G. Bl	Letter to John Dunne	04 Nov 2	P	
	<b>B</b>		04 Nov 2014	16:44	BLA001/0001	CN	сом	CN	Gordon T. Black RTA Walkinstown Crossroads, G. Bl	Letter to Client	04 Nov 2	P	
	<b>B</b>		04 Nov 2014	16:35	BLA001/0001	CN	сом	CN	Gordon T. Black RTA Walkinstown Crossroads, G. Bl	Letter to Client	04 Nov 2	P	
Tasks			03 Nov 2014	16:37	ABA001/0003	CN	сом	CN	David Abrahams Sale of 22 O'Connell Street. Dublin 1	Letter to Barrister	03 Nov 2	P	
Search/Open	-		03 Nov 2014	16:23	ABA001/0003	CN	сом	CN	David Abrahams Sale of 22 O'Connell Street, Dublin 1	Letter to Solicitor	03 Nov 2	P	
Client/Case					Count=60				sale of 22 O connell street, Dublin 1				· · · · · · · · · · · · · · · · · · ·

# The Home Tab in Task Manager

New Item - Actions	New	Click on New Item to add any of tasks.	these
Print ~	Printer	Click to print any of the following reports:	Activity Report     Case Summary Report     Matter Label     Client Label
Capture	Capture	Click on capture to launch the d program to import documents o documents or images.	ocument capture
Generate	Generate	Click to generate a document fo	r a selected action.
Complete Action	Complete Action	Click to mark a task as complete	

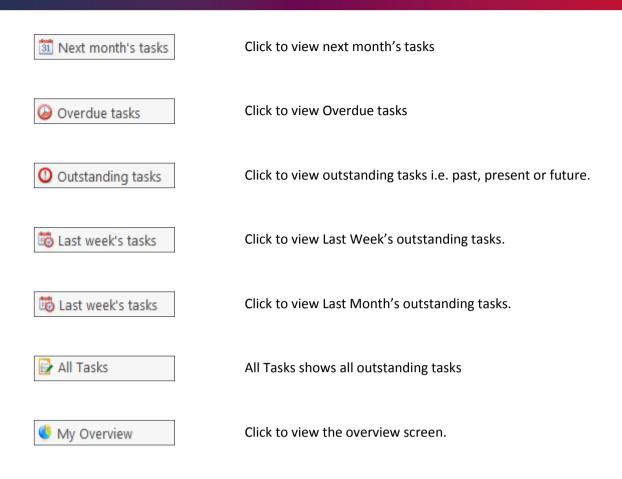
## **Task Views**

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.



Standard View

View



# **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.

Standard View

Critical Dates Delegeted Tasks

Phone Message: Scanned Post

Statute Dates

Dictation High Priority Items Milestone/HighLighted Items

#### 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.

Rev	/iew		6	3							Stand	ard View
			Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action	Diary Date	
	2	10-	04 Nov 2014	19:31	GLE001/0001	CN	сом	CN	Charlie Gleeson Lease of South West Georges Str	Review File	04 Nov 2014	F
	2		04 Nov 2014	18:16	BLA001/0002	CN	СОМ	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D	Review File	04 Nov 2014	F
	2		04 Nov 2014	18:15	BLA001/0002	CN	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D	Review File	04 Nov 2014	F
	2		28 May 2014	08:36	BLA001/0001	CN	COM	CN	Gordon T. Black RTA Walkinstown Crossroads, G	Review all contracts	28 May 2014	F
	2		07 May 2014	11:49	KEL002/0001	CN	сом	CN	Sarah Kelly Purchase of Property	Review File	07 May 2014	F
₽			07 May 2014	11:35	OCO001/0001	CN	сом	CN	John O'Connor John O'Connor V John Smith	File <mark>Review</mark>	07 May 2014	F
	2		26 Dec 2013	12:04	KEL002/0001	CN	сом	CN	Sarah Kelly Purchase of Property	<mark>Review</mark> File	26 Dec 2013	F

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 Case Code<sup>♥</sup> Click on the pin and select the required category. See the following example

	er Car			DutStandi					
			Date	Time	Case Code	A Handler     (Blanks)	To	am	
•	1		04 Nov 2014	18:16	BLA001/000	(Non blanks)		м	
	:		04 Nov 2014	18:15	BLA001/00	AAA001/0001 AAA001/0003		м	
H.			04 Nov 2014	17:26	BLA001/00	ABA001/0001 ABA001/0003		м	
Ħ			04 Nov 2014	17:25	BLA001/000	ABB001/0001 ABB001/0007		м	
H.			04 Nov 2014	17:25	BLA001/000	BIL001/0001 BLA001/0001		м	
		10-	04 Nov 2014	17:24	BLA001/000	BLA001/0002 BLO001/0005		м	
H.			04 Nov 2014	17:24	BLA001/000	CLI001/0001 DEA001/0000		м	
H.			04 Nov 2014	17:19	BLA001/000	FIS001/0001 FIT002/0001		м	
B2			04 Nov 2014	17:11	BLA001/000	GLE001/0001 KEL002/0001		м	

#### 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.

Ha	ndle	er <mark>C</mark> a	arol	No	lan 🔽 🗹 Ou	itStandin	a Onlv				
ŝ	Se	arch									
					Date	Time	Case Cod		Handler Team From	Client/Case(Matter)	T
Þ			:	<b>P</b>	04 Nov 2014	19:31	GLE001/00	Ź↓ Z↓	Sort Ascending Sort Descending	Charlie Gleeson Lease of South West Georges Str	
	<mark>₿</mark> ₿			<b>1</b>	04 Nov 2014	19:09	GLE001/00	2¥	Clear Sorting Group By This Column	Charlie Gleeson Lease of South West Georges Str	
	<b>B</b>				04 Nov 2014	19:07	ABA001/00	_	Show Group Panel	David Abrahams Sale of 22 O'Connell Street, Dubli	
			:		04 Nov 2014	18:16	BLA001/00		Show Column Chooser Best Fit	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D	
			:		04 Nov 2014	18:15	BLA001/00	Ŷ	Best Fit (all columns)	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D	
	<b>f</b>			~	04 Nov 2014	17:26	BLA001/00		Filter Editor CN COM CN	Gordon T. Black مرتبطو of 2 Trjin مناسم المراجع	

- 2. Click on Group By This column. See the following example of a grouping by fee earner
- To expand/collapse a group click on the arrow to the left. See the following example

+		Date	Time	Case Code	<ul> <li>Handler</li> </ul>	ream	From	Client/Case(Matter)	Action	
	Case Code: AAA001/0001									
	Case Code: AAA001/0003									
	✓ Case Code: ABA001/0001									
	ন	25 Jun 2014	12:51	ABA001/0001	CN	сом	CN	David Abrahams Family Law	Court Date	
	ন্দ	07 May 2014	08:36	ABA001/0001	CN	сом	CN	David Abrahams Family Law	Court Date	

- 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

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

#### 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 Open Document 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 ٥ Play Dictation 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 0 Complete Action Action from the pop-up menu to complete an action with today's date. 0 Complete Hold 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.

🖲 🛛 Alarm Case

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

R	Maintain TaskAlarm	×
MatterCode	BLA001/0001	Assign To
Alarm	Letter to Solicitor	Carol Nolan
Date	04 Nov 2014 💌 Time 5:15	All Delegates
	Letter to Solicitor	Delegates
		Carol Nolan
Text		
		OK Cancel

Ø

Alarm Action

#### **View Other Users' Tasks**

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

Handler Carol Nolan 🛛 🗸 OutStanding Only

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

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

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

) Search						
Code	Name	Due Tasks	Outstanding Tasks	Outstanding Phone Calls	Team	
ADM	Admin	4	4	0	сом	^
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.

C	Push Action 🛛 🔓	×		To date
<b>N</b>	Create Outlook Task	7	Plus 7 days	
N	Show Assignments	14	Plus 14 days	
*	Assign Action		31	Plus 31 days

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.

Tag All

**1** 

UnTag All

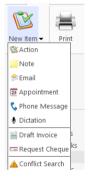
- 1. **Right click** in the task list, to see the pop-up menu.
- 2. Click on Tag All.

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.



1	Add
8	Edit
8	Delete
0	EMail Action
Ð.	Сору
	Paste
Ð.	Copy to another file
а,	Move to another file
H°	Generate Documents
10	Complete Action
٠	Play Dictation
10	Complete Hold Date
<b>1</b>	Create Outlook Task
œ	Push Action
0	Show Action Assignments
2	Assign Action
	Take Action
	Mile Stone Action
1	Alarm Action
۲	Alarm Case
File	Output Grid List To

3. The following window will appear.

			Add Action				<b>-</b> ×
Action							
🛱 Generate Document 🖉 P	ost Time 📒 Note	🚦 High	Take Action	隧 Generate	💕 Save		
	Complete 🔗 Email	Normal	Assign Action				
🖢 Play Dictation 🛛 🗯 P							
	Actions	Priority	Assignment	SDLT			
General Properties Atta	achment/Documents	Action Assignments	Other Notes				
Case ABB002/0003	3	Power O	f Attorney				
Action Code ADMNT		Note					
Date 04 Apr 2017		✓ Due Date	04 Apr 2017		1	<b>~</b>	
Subject							
General Email Appo	intment Phone Mes	isage					
FE/Handler Carol Nolan	, ,		~	]			
Team Commercia			v				
Commercia	•			1			
						0	k Cancel

- 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 Due Date	Click the down arrow and select a date from the calendar. Click the down arrow and select a due date from the calendar.
Subject F/e Handler	Input a subject 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.

Action         Bit Generate Document @Post Time _ Note       I High _ Take Action _ Senerate _ Save _ Post Attachment @ Complete @ Email _ Nomail _ Assign Action _ Sol T         Play Dictation _ # Print _ Email (Template _ Low _ Assign Action _ Sol T       Sol T         General Properties Attachment/Documents Action Assignments Other Notes       Case _ HAR001/0001				(	Change Action ( 3	122 )		-	- ×
Open Attachment Complete Email Norma Assign Action Play Dictation EPrint Email (Template) Low Priority Assignment SDLT General Properties Attachment/Documents Action Assignments Other Notes Case HAR001/0001 IIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Action								
Play Dictation # Print Properties Attachment/Documents Action Assignment SDLT   General Properties Attachment/Documents Action Assignments Other Notes   Case HAR001/0001   Action Code G07   Letter to Barrister re Opinion     General   Enail   Appointment   Phone Message   FE/Handler   Carol Nolan   Team   Commercial   Letter to Barrister re Opinion	🔛 Generate Doc	cument 🕜 Post Time	. Note	🚦 High	Take Action	隧 Generate	隧 Save		
Default Actions Priority Assignment SDLT     General Properties Attachment/Documents Action Assignments Other Notes     Case HAR001/0001	🖄 Open Attachn	nent 🛛 🗹 Complete	< Email	Normal	🕹 Assign Action				
General       Properties       Attachment/Documents       Action Assignments       Other Notes         Case       HAR001/0001	Play Dictation		 Email (Template	) 👎 Low					
Case HAR001/0001 RTA © Dundrum Roundabout Action Code G07 Letter to Barrister ? Date [21 Sep 2016 V Due Date 30 Sep 2016 V Subject Letter to Barrister re Opinion General Email Appointment Phone Message FE/Handler Carol Nolan V Team Commercial V Letter to Barrister re Opinion		Default Actions		Priority	Assignment	SDLT			
Action Code GO7 Letter to Barrister ? Date 21 Sep 2016 V Due Date 30 Sep 2016 V Subject Letter to Barrister re Opinion FE/Handler Carol Nolan V Team Commercial V Letter to Barrister re Opinion	General Prop	perties Attachment/	Documents Action	n Assignments	Other Notes				
Date 12 Sep 2016 V Due Date 30 Sep 2016 V Subject Letter to Barrister re Opinion General Email Appointment Phone Message FE/Handler Carol Nolan V Team Commercial V Letter to Barrister re Opinion	Case	HAR001/0001		RTA @ Du	undrum Roundabo	out			
Subject Letter to Barrister re Opinion  General Email Appointment Phone Message  FE/Handler  Team Commercial  Letter to Barrister re Opinion	Action Code	G07		Letter to I	Barrister ?				
Subject Letter to Barrister re Opinion  General Email Appointment Phone Message  FE/Handler  Team Commercial  Letter to Barrister re Opinion	Date	21 Sep 2016	~	Due Date	30 Sep 2016		•	$\checkmark$	
General Email Appointment Phone Message          FE/Handler       Carol Nolan         Team       Commercial         Letter to Barrister re Opinion       Image: Carol Nolan			) pinion						
FE/Handler       Carol Nolan         Team       Commercial         Letter to Barrister re Opinion									
Team       Commercial         Letter to Barrister re Opinion			Phone Wessage						
Letter to Barrister re Opinion	FE/Handler	Carol Nolan			~				
	Team	Commercial			~				
									$\exists$
Ok Cancel	Letter to Barr	ister re Opinion							
Ok Cancel									
Ok Cancel									
Ok Cancel									
Ok Cancel									
Ok Cancel									
Ok Cancel									
Ok Cancel									
Ok Cancel									
Ok Cancel									
Ok Cancel									
								Ok Can	cel

- 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
1	<b>1</b>	30 Apr 2018	09:29	ABB001/0005	BH	сом	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.
- 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.

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

Select Resource

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 is 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.

								Change	e Action ( 307	(5)						•	- 1
ction																	
Gene	rate Document	🕜 Po	st Time 📒 I	lote		🚦 Hi	igh	📑 Tak	e Action	💕 Save							
Open	Attachment	🗸 Co	mplete 🔗 E	mail		N	ormal	🕹 Assi	ign Action								
Play (	Dictation	🚐 Pri	nt 🔶 E	mail (Te	mplate)	🗸 Lo	w	よ Del	ete Assignme	nts							
	D	efault A	ctions			Pric	ority	A	ssignment								
Senera	al Properties	Attac	hment/Docu	iments	Action	Assign	ments	Othe	r Notes								
	Ву		Action	For			Date Assigr	ned	Time Assigned	Date Returned	Time Returned	Assigned By	Returned By	Delegate	Team	A	
•	Carol Nolan(C	N)	Delegated	Brian S	weeney(	BS)	02 No	w 2015	10:32			CN		CN	сом		^
1	Carol Nolan(C	N)	Processed	Carol 1	volan(CN	)	02 No	v 2015	17:23	02 Nov 2015	17:23	CN	CN	CN			
	Carol Nolan(C	N)	Created	Carol 1	volan(CN	)	02 No	v 2015	17:23			CN		CN	COM		

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

# How to take a Task

- 1. Go to another 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.

🖆 Take Action



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

# **Task List Options**

#### Print your task list

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

er Diary Report		×
er Parameters		
CN	~	
27 Jun 2015	15	
27 Jul 2015	15	
Incomplete	~	
All	~	
Priority	~	
<b>&gt;</b>		
<b>&gt;</b>		
<b>&gt;</b>		
	~	
	Run	Close
	r Parameters CN 27 Jun 2015 27 Jul 2015 Incomplete All Priority V	r Parameters

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.

Run

- 2. Click on **Run** to generate a report.
- 3. You may print the report or open a copy in:

PDF	XLS				
Type th	e text to find	-			6
		Soo Grabbit	& Run	ine	
		Handle	r Diai	v	Data Date : 09/11/2014 : 15:43
		Carol			From Date:02/03/2001 ToDate:09/11/2014 Status: Outstanding
		Carol	Nolan		Action Type: All
Matter	Date	Client Name	From	Diary Code	
Action Id	Time	Description	Status	Item Type	Diary Description
High Priority					
FIT002/0001 1903	19/12/2013	Melinda FitzGerald Sale of lands in wicklow	CN NA	G16 Action	Review File
Not Applicable		Sale of lands in wicklow	INA	Action	
KEL002/0001		Sarah Kelly	CN	G16	Review File
1865	12:04:37	Purchase of Property	NA	Action	
Not Applicable					
KEL002/0001	07/05/2014	Sarah Kelly	CN	G16	Review File
1861	11:49:29	Purchase of Property	NA	Action	
Not Applicable					
BLA001/0001 1817	28/05/2014 08:36:03	Gordon T. Black RTA Walkinstown Crossroads, G. Black	CN NA	G16 Action	Review all contracts
Not Applicable		RTA Walkinstown Crossroads, G. Black	INA	Action	
BLA001/0001		Gordon T. Black	CN	G16	incoming copies doc
1837	17:12:35	RTA Walkinstown Crossroads, G. Black	NA	Action	
Not Applicable	)				
AAA001/0001		AAA Securities Ltd	CN	ADMSD	Statute of Limitations Date =06 Nov
1932	16:08:00	Landlord Dispute	NA	Statute Date	2014
Not Applicable		Neel Dilling	CN	ADMUD	Lindertaking Created:
BIL001/0001 1931	01/11/2014 11:49:41	Noel Billing RTA Brennanstown Valley Roundabout	NA		Undertaking Created: Date: 01 Nov 2014
Not Applicable		TCTA Dreimanstown valley Roundabout	11/2	ondentaking	Type: Financial Given Authorised By: AM Anne Mellon
BLA001/0002		Gordon T. Black	CN	G16	Review File
1961 Not Applicable	18:15:00	Sale of 2 Trinity Close, Rathgar, Dublin 6	NA	Action	
BLA001/0002		Gordon T. Black	CN	G16	Review File
1962	18:16:39	Sale of 2 Trinity Close, Rathgar, Dublin 6	NA	Action	
Not Applicable					

- 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.

Organize 🔻 🛛 New fold	er				(
★ Favorites	Name	Date modified	Туре	Size	
Nesktop	퉬 keyhouse	03/11/2014 16:21	File folder		
🐌 Downloads	) khframework	22/10/2014 10:59	File folder		
🗐 Recent Places	鷆 NEW Sites Blank Database Scripts	22/10/2014 10:44	File folder		
	퉬 PUR	03/11/2014 16:18	File folder		
🥃 Libraries	퉬 SAL	03/11/2014 16:18	File folder		
Documents	퉬 StandardReports	22/10/2014 15:29	File folder		
J Music					
Pictures					
H Videos					
🔞 Homegroup					
🖳 Computer		$\square$			
🕌 Local Disk (C:)					
🚽 Keyhouse (\\helli					
🖬 Network 👻					
File name:					
Save as type: Excel	File (* vlov)				_

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

🔊 Export To 🔪 🕨	6	PDF
5	B	Excel
	E	Text
	P	Rich Text

# **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 Client Contact	Details activity carried out on the all matters (Last 400 actions). Details all client contact information stored for the client.

# **General Tab**

art Timer Post Time Accelum													
Client/Case Case Diary Document Manager Current Client Details		David Abrahams Family Law I Client Records Other Deta Last Client Activity Date 04 M	2016									Tet 0 F/e: J	
Current Case Details Extra Case Details EAssociates Critical Information Know Your Client	No. of open matters this year 0 Last Matter Created 25 Apr 2012	ABA001/0002 HIPS Negligence - October	Client Name	David Abrahams * Select category type	Contact Category Date Category *	Please select date Select category type	×						
A/c Ledger Time Ledger Debt Ledger	Client Category Profile		Extra informatio	n								Standard V	lew
Reserve Ledger Undertakings	Category Type Description Mailing List	Category Description Private Clients List						Field Value 5	Field Value 6	Field Value 7	Field Value 8	Field Value 9	
(Strong Room	kaling bit Achens Soure	XMAS Cards News Letter				(	Çancel						
Tasks Search/Open													
	<												

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.

Туре:	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**.

1	Keyhouse Case Management (CH - Gent Nove - 800 / 600)	) - 8 ×
Home Case Reports	Partners Phone Log Maintain Setup Help	
Start Timer Post Time		
Client/Case	Case: AsADD1 (0001 ) Devid Abrahams Family Law	Tel: 01-290222 F/e: JP
Document Manager	General Anti Money Laundering Financial Client Records Other Details Activity Client Contacts	
Scurrent Client Details Current Case Details	Type Standard Due Diligence V Status In Progress V Last Instruction Recieved 12 Feb 2016 15:28:00	
Associates	Client Type Residential Private Individual 🌱 Introduction By Face to face meeting 👻 🕅 Approve	
<ul> <li>Critical Information</li> <li>Know Your Client</li> </ul>	AML Records	
A/c Ledger	Snach	
Debt Ledger	Type Proof Date Entered Input By Matter Code	
Reserve Ledger Undertakings	Image: Add         Image: Operation of the second seco	^
E Strong Room	Detec     Detec     Or To Case Diay	
	and the second and th	m

- 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.

<ul> <li>(e) → ↑</li> <li>(f) → This PC → Docum</li> <li>Organise → New folder</li> </ul>	nents 🕨 Scan Folder		V 🖒 Sear	ch Scan Folder	Q
-					
				8≡≡ ▼	
🔆 Favourites	^ Name	Date modified	Туре	Size	
Desktop	🔁 Electrical Bill for David Abrahams.pdf	19/05/2014 17:30	Adobe Acrobat D	659 KB	
Downloads					
📃 Recent places					
🜏 Homegroup					
_					
1툪 This PC 鄑 admin (keytrain)					
Desktop					
Documents					
Downloads					
Music					
Pictures Videos					
Windows (C:)					
RECOVERY (D-)	~				
File <u>n</u> ame: Electrical I	Bill for David Abrahams.pdf		✓ All f	iles (*.*)	~
				Open Ca	incel

4. Select the type of ID supplied

Task       Second put to the spectrum       Final y are       Final y are       Final y are       Final y are       Final y are in the spectrum	Home Case Reports	Partners Phon	e Log Maintain Setup Help		Keyhouse (	ase Management (CN - Carol Noian - 00:10 / 02:20)		Quick Search (Ctrl + Q)	67 ×
A Client Ucade       Tanaki Law       Free	rt Timer Post Time								
Karred Level Dealls For carde Level Dealls For card De	Case Diary		Family	Law	ivity Client Contacts			Tel: 01-2 F/e: JP	
Social identification       View Type       Redentified Private Moldulation       View Instruction By Taxe to face meeting       View Instruction         Social identification       Social identification       View Instruction       View Instruction         A t tadger       Instruction       Preod       Date treared       Neput By         Social identification       Preod       Date treared       Neput By       Matter Code         Social Identification       Preod       Date treared       Neput By       Matter Code         Social Identification       Preod       Date treared       Neput By       Matter Code         Social Identification       Preod       Date treared       Neput By       Netter Code         Image: Code       Image: Code       Image: Code       Image: Code       Image: Code         Image: Code       Image: Code       Image: Code       Image: Code       Image: Code       Image: Code         Image: Code <t< td=""><td>Current Client Details Current Case Details</td><td>Туре</td><td>Standard Due Diligence</td><td></td><td>♥ Status</td><td>in Progress</td><td>Last Instruction Recieved 12 Feb 2016 15:28:00</td><td></td><td></td></t<>	Current Client Details Current Case Details	Туре	Standard Due Diligence		♥ Status	in Progress	Last Instruction Recieved 12 Feb 2016 15:28:00		
An C kdger Imit kdger On Ki kdger On Ki kdger       Imit kdger Imit kdger       Imit kdger         Strong Ricon       Imit kdger       Imit kdger         Strong Ricon       Imit kdger       Imit kdger         Strong Ricon       Imit kdger       Imit kdger         Tarka       Imit kdger       Imit kdger         Strong Ricon       Imit kdger       Imit kdger         Tarka       Imit kdger       Imit kdger         Strong Ricon       Imit kdger       Imit kdger         Imit kdger       Imi	Associates	Client Type	Residential Private Individual		Introduction By	Face to face meeting	V Approve		
Trace Leight       Reserve Leight       130rong Room       Tasks       Search/Open		AML Recon	ds						
Tasis         Tasis	Time Ledger Debt Ledger Reserve Ledger Undertakings		Proof	Date Entered	Input By	Matter Code			^
Search/Opin						Description     Observation     Observati			
Client/Case									
circlin case	Client/Case								

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

Home Case Reports	Partners P	Phone Log	Maintain Se	tup Help		Keyhor	ise Ca	ase Management (C	N - Carol Nolan - 00:10 / 07:20 )				Quick Search (Ctrl +	0)	- 6	×
Start Timer Post Time																
Client/Case Case Diary	Case: ABADO1	1/0001	••	David A Family L											l: 01-290 1: JP	32222
Document Manager	General A	nti Money L	aundering Fin	ancial Clier	nt Records	Other Details Activity Client Contact	s									
Scurrent Client Details	Туре	Standa	ard Due Diligence			✓ Status	In	n Progress		>	Last In	struction Recieved 12 Feb 2016 15:28:00				
Extra Case Details											🗹 Ap					
Associates Critical Information	Client Type		ntial Private Indi	nduar		* introduction	sy Fa	face to face meeting			∏ ⊠ Ap	prove				
A/c Ledger	Search	corus														
Time Ledger	Туре		Proof		Date Enter	ed Input By			vlatter Code							- 1
<ul> <li>Debt Ledger</li> <li>Reserve Ledger</li> </ul>	Non Pho	oto ID	Utility bills	(including t.	23 May 20	16 CN			IBA001/0001							^
Undertakings																
Home Case Reports	Dartmann	hone Log	Maintain Se	tup Help		Keyhos	ise Ca	ase Management (C	N - Carol Nolan - 00:10 / 07:20)				Quick Search (Ctrl +	۵)	- 8	×
	Partners P	none Log														
않 📥 A	<b>**</b>	574	à	à												
A CT 1/C	Case: ABADO1	1/0001		David A	brahams									Те	1: 01-290	02222
Client/Case 🛯 🗮 Case Diary				Family L										F/4	e: BS	
Document Manager	WARNING : In		tanding over 1 Y											Ignore	Show	me
Surrent Client Details	Searc	sh											Sta	ndard View	•	
🎒 Extra Case Details	A	P D A	Date	Time	Handler	Synopsis								Action Co	F	Pro
Associates Critical Information	tion		23 May 2016	15:32	CN										P ^	Preview
🗳 Know Your Client			23 May 2016	15:31	CN										9	
$\phi^{\rho}$ Linked Cases	151		04 May 2016 04 May 2016	16:40	CN	Draft Bill Draft Bill No: 274 Letter to Solicitor re Pleading								D801 G03	8	
📓 A/c Ledger	₩ ()		27 Jun 2014	14:59	CN	Undertaking To AIB Longford								ADMUD	P	
Time Ledger			23 May 2016	15:33	CN	Utility bills (including those printed fro	m the	e internet)						nomoo		
Reserve Ledger	3	1	04 May 2016	15:53	CN	Remind Lender to send Title								PSL04	P	
Undertakings	3		19 Jun 2014	11:41	BS	Invoice No:230								D801	P	
E Strong Room	S 📒		19 May 2014	16:32	BS	Letter from Accountant								G26	9	
	S S 2		01 May 2014 01 May 2014	23:54 22:29	BS BS	Invoice No:229 Email Fromkeyhousedemo@gmail.com		tabile Call to Baian Com						DB01 EMI	22	
	S 2		01 May 2014	12:30	BS	Email Frombrian@keyhouse.ie - Pract								EMI	8	
	5		01 May 2014	00:00	BS	Email To: - Financial Trends for the Ec								EMI	8	
	5 5		27 Feb 2014	09:01	BS	David Abrahams								PHE	P	
	🍯 🛸	1	27 Feb 2014	07:08	BS	Email To:brian@keyhousedemo.ie - Si	imple	Report for Key Perfor	mance Indicators					EMI	P	
	•		16 Jul 2013	15:54	BS	Letter to Solicitor re title Letter to Alls	op & E	Browne						G03	P	
	S 0	1	09 May 2013	08:47	BS	Accountants Letter								G13	9	
	2 D		17 Apr 2013 17 Apr 2013	11:24	BS	Brian Email To: - Copy Land Folio								EMI	20	
	5 5		21 Mar 2013	08:43	BS	David								PHO	P	
	00		12 Feb 2013	22:29	BS	Innovation Ad								G13	8	
						La cara a conc									m Y	4
	Attach	ments Se	arch										Stan	dard View		
		Document								Version Date		Document Class				1
Tasks	<ul> <li>10</li> </ul>	Electricity	Bill							1 23 May :	2016	General			^	
Search/Open																
Client/Case																
Time Costing															~	

# Adding Existing Documents to AML Screen

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

1							Keyhouse Case Management (CN - Cerol Holen - 0000 / 0730)	earch (Ctrl + Q)	
Home Case Report	ts Partn	iers Phone	Log M	aintain Setu	up Help				
Vew Item - Print - Capt		ate Complete	-	-					
Client/Case	Case:	TEG001/0001		٩►	Peter Teg RTA on N				el: 01-5698 'e: CN
Case Diary Document Manager	WARN	ING: Only co	ntact by e	mail				Ignore	Show m
Current Client Details									_
S Current Case Details	1	Search Search						Standard View	. 4 📰
🕽 Extra Case Details	_	Search	A Da	ate	Time	Handler	Synopsis	Standard View Action Co	
) Extra Case Details Associates	_				Time 12:05		Synopsis Statute of Limitations Date = 31 Jan 2018		
<ul> <li>Extra Case Details</li> <li>Associates</li> <li>Critical Information</li> </ul>	_	A P D	21	Jan 2018				Action Co	. F
Extra Case Details Associates Critical Information Know Your Client	_	A P D	21 8 09	Jan 2018 Aug 2016	12:05	CN	Statute of Limitations Date =31 Jan 2018	Action Co ADMSD	F
Extra Case Details Associates Critical Information Know Your Client	_	C A P D	21 9 09	Jan 2018 Aug 2016 Mar 2016	12:05 16:30	CN CN CN	Statute of Limitations Date =31 Jan 2018 Forward Funds	Action Co ADMSD ADMUD	F P2 ^ P2
Extra Case Details Associates Critical Information Know Your Client A/c Ledger Time Ledger	_	C A P D	21 9 09 11 8 09	Jan 2018 Aug 2016 Mar 2016 Mar 2016	12:05 16:30 12:42	CN CN CN	Status of Limitations Date = 31 Jan 2018 Forward Funds Cincil Date = Statement conference Cincil Date = Statement conference	Action Co ADMSD ADMUD G23	- F 
	_	C A P D	21 8 09 11 8 09 8 09 8 09	Jan 2018 Aug 2016 Mar 2016 Mar 2016 Mar 2016	12:05 16:30 12:42 10:07	CN CN CN CN CN CN	Statute of Limitations Date = 31 Jan 2018 Forward funds Oricital Date - Stelmenett conference Letter to Client	Action Co ADMSD ADMUD G23 G02	- E

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

		Change Action ( 30	)67)				<b>-</b> ×
Action							
🚼 Generate Document 🛛 🖉 Post Time 📒 Note	🚦 High	Take Action	隧 Save				
🚵 Open Attachment 🛛 🖋 Complete  😒 Email	Normal	Assign Action					
🖢 Play Dictation 🛛 🚔 Print 🔶 Email (T	emplate) 👎 Low						
Default Actions	Priority	Assignment				 	
General Properties Attachment/Documents	Action Assignments	Other Notes					
Action Status Please select a status		N	1				
Flag 🕞 Clear Flag							
Publish Priority		Category					
			0.0				
None     High     Normal		<ul> <li>Action</li> </ul>		tatute Date			
Publish Only     Normal     Low		○ Fixed Dated Action	on O C	ritical Date			
O Export Only		○ Note	00	ourt Date			
		<ul> <li>Appointment</li> </ul>	⊖ Se	canned Post/Mai	l		
		O Reminder	OC	heque Request			
		🔿 Email	OP	hoto ID			
		O Phone Message	⊚ N	on Photo ID			
Publish Status Other Prope	rties	<ul> <li>Dictation</li> </ul>	0.0	orporate Entities			
Communication Sent Mileston	ne	O Undertaking					
Comple	te	Ordertaking					
Billable							
	ents Processed						
Know Ye	our Client						
						Ok	Cancel

5. Complete the action.

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

Home Case Reports	Partners Ph	one Log Maintain Setup Help		Keyhouse Ca	se Management 🛛 🤇	(N - Carol Nolan - 00.00 / 07.30)		Quick Search (Ctrl + Q)	) - • ×
Start Timer Post Time									
Client/Case	Case: TEG001/		14 at Lucan	Client Contacts					Tel: 01-5698741 F/e: CN
Corcentent Vientagin     Current Client Details     Current Case Details     Data Case Details     Associates	Type Client Type	Standard Due Diligence Residential Private Individual		Status     Introduction By	In Progress Face to face meeting	9	V Approve		
Critical Information     Know Your Client     A/c Ledger     Time Ledger	AML Reco	Proof	Date Entered	Insuit Du		Matter Code			
<ul> <li>Debt Ledger</li> <li>Reserve Ledger</li> <li>Undertakings</li> </ul>	Non Phote			Input By CN		TEG001/0001			^

# **Client Records**

Documents related to the client rather than to a specific matter can be added here e.g. a Service Level 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.

Generate Document	I High         I Take Action         Save           Normal         ♣ Assign Action         I Save           Ite)         ♣ Low         Assignment	
Ceneral Properties Attachment/Documents Act Action Status NA v Flag P Clear Flag v		
Publish  i None  publish Only  publish Only  publish Only  publish Only  All	Priority     High     Normal     Low     Other Properties     Milestone	Catagory Action Section Act
Publish Status	Complete Billable Documents Processed Know Your Client	Undertaking Statute Date Critical Date Conficial Date Sanned Port/Nall Chege Request Photo ID Nor Photo ID

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

۲			Keyhouse Case Manag	ement (CN - Carol Nolan - 00:02 / 07:28)		Quick Search (Ctrl + Q)
Home Case Reports	Phone Log Maintain Setup Help					
ö ö 🛉	s 🗙 🔶					
Start Timer Post Time Add Accounts	Clear All Delete All Import Other Case Details					
🙏 Client/Case	Case: ABA001/0001					Tel: 01-2902222
Case Diary	Family Law					F/e: CN
Document Manager	General Anti Money Laundering Financial Client Record	S Other Details Activi	ty			
Securrent Client Details	Search					Standard View
Current Case Details Other Case Details	Other Documents	Matter	Date Entered	Fe	Handler	2
Associates	Call from: David Abrahams Phone No: +353-87-8768108	0001	27 Feb 2014	CN	BS	* ***********************************
Critical Information						-
🚔 Know Your Client						
Alexiner A					~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

# **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.

Case: FLY	001/0001	Ja	ck Flynn						
		Sa	ale of 10 Rose Lav	n, Blanchardsto	wn, Dublin	17			
General	Anti Money Laundering	Financial	Client Records	Other Details	Activity	Client Contacts			
Form (	Credit Check	~							
Enter	the Client's Credit Rating								
							~		
Enter	the Risk								
							~		

# **Client Contacts**

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

۱							Keyhouse Case	e Management	(CN - Carol Nolan - 00	0.01 / 07.29)					Quick	Search (Ctrl + Q	) - • ×
Home Case Reports	Phone Lo	g Maintain	Setup Help														
Start Timer Post Time																	
🙏 Client/Case	Case: BOIB	US/0002	<b>4 F</b>	Bing Oil Industrie	s Business Banki	g											Tel: 01-6653480
Case Diary				Advice re Agreer	nent												F/e: BS
Document Manager	General	Anti Money La	undering Financia	I Client Record	S Other Detail	Activity Clie	ent Contacts										
& Current Client Details	Search																Standard View 📰
Extra Case Details	Initials	Full Name	Home Phone	Work Phone	Mobile	First Name	Surname	Salutation	PPS Number	Title	Address	Email Address	DOB	Marriage Date	Occupation	Dateof Death	Marital Status
🙅 Associates	▶ Mr	Fred Ryan		01-665-8700		Fred	Ryan	Fred		FR		Fred.Jones@b					^
<ol> <li>Critical Information</li> </ol>	Ms	Cathy Tyler		01-665-7801		Cathy	Tyler	Cathy		CT		cathy.tyler@b					
Know Your Client  A/C Ledger  Time Ledger  Debt Ledger  Reserve Ledger  Undertakings  Strong Room																	
Tasks																	
Search/Open	- c																~
Client/Case	. c															Insert	
Time Costing																	Change Delete

# **Chapter 8: Keyhouse Capture**

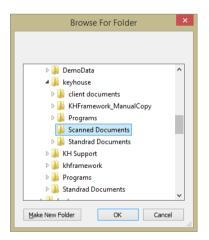
# How to Capture a Folder

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.



)   <del>-</del>			Keyhouse - Cap	ure Documents	_ = ×
Options					^ 🔗 🖴 🧏 🍸
2 🖬 🤷 🍸 😢 🕷					
	New Case	C:\Users\Brenda\D	ocuments		
File Folder Docs Docs filter Shortcut					
Capture Document Options			Last Sele	ed Folder Path	
Select documents to capture				Preview Pane	
Search					
File Name	Class	Туре	Modified		
🔺 🗌 🗁 Add-in Express			13 Jul 2015 🔺		
adxloader		.LOG	04 May 2		
adxregistrator		.LOG	25 Nov 2		
🔺 🗌 🗁 Camtasia Studio			06 Nov 2		
Custom Production Presets 8.0			16 Sep 20		
🗌 🛅 Media			16 Sep 20		
test		.TREC	06 Nov 2		
🔺 🗌 🗁 Creating Clients & Matters - iSpr			01 Oct 20		
audio			01 Oct 20		
🗌 🛅 bgaudio			01 Oct 20		
interactions			01 Oct 20		
🕨 🔲 quiz			01 Oct 20		
🗌 🛅 video			01 Oct 20		
presentations		.XML	01 Oct 20		
			01 Oct 20		
Custom Office Templates			22 Apr 20		
Knowledge Articles - Template		.DOTX	16 Sep 20		
Sprinttrainingtemplate		.DOTX	11 Aug 2		
4 🗌 🗁 CyberLink			01 May 2		
I oralStorage V2			01 May 2		

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.

I ▼		Keyhouse - Capture Docume	ents	- = ×
	lew Case	Last Selected Folder Pa	ath Preview Panel	4
Search File Name C Search File Name C Search File Name C Search C	lass Type PDF PDF PDF PDF PDF PDF PDF PDF PDF PDF	Modified 0 44 May 2 ^ 19 May 2 19 Jun 20 19 Jun 20 19 Jun 20 19 Jun 20 19 Jun 20 19 May 2 16 Feb 20 29 May 2 19 May 2 16 Feb 20 19 May 2 19 May 2 19 May 2 19 Jun 20		

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.

1	' 💼 🐚 🍸 👩 🍈	<u> </u>			
ielec	t Select Assign Filtered Remove Create	New Case	C:\Keyhouse\keyh	ouse\Scanned Do	
File	Folder Docs Docs filter Shortcut	Wizard			✓ ×
	Capture Document Options			Last S	ected Folder Path
Sel	ect documents to capture				Preview Panel *
					Cr\Keyhouse\keyhouse\Scanned Documents\Sharpscanner-2237.pdf
	le Name	Class	Type	Modified	
1	Scanned Documents			30 May 2	🖺 🖶   〇 🕀   入 🛛
	20090720sharpscanner@key		.PDF	19 May 2	
	20090sharpscanner@keyhou		.PDF	16 Feb 20	or hit Law tocaty
Τ	Report from the Law Society		.PDF	18 Jun 20	
	harpscanner@keyhouse.ie		.PDF	16 Feb 20	
	sharpscanner@keyhouse.ie		.PDF	19 May 2	
	sharpscanner@keyhouse.ie		.PDF	16 Feb 20	14th Annual Report
	sharpscanner@keyhouse.ie		.PDF	29 May 2	
	sharpscanner@keyhouse.ie		PDF	19 May 2 16 Feb 20	of the
			PDF	18 Feb 20	Independent Adjudicator
	sharpscanner@keyhouse.ie		PDF	19 Jun 20	
	sharpscanner@keynouse.ae		PUF	19 Jun 20	of the
					Law Society of Ireland
					Law Society of Ireland

**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.



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.

	Assign checked documents to Case/Matter		×
Case/Matter	BLA001/0001 Gordon T. Black / RTA Walkinstown Crossroads, G. Black		
Handler	Carol Nolan		
Action Code	G22 Scanned Post/Mail		
Document Class	Letters/Interparte Correspondence		
Diary Date	20/03/2019 [OR] 🗹 Use file date as Diary date 🗹 Use file date as Document date		
Diary Description			
	Note: Leave description blank to use document name as the description		
Capture Settings	Convert captured documents to PDF		
	Remove captured documents from original location		
	Set captured document as complete		
Save Settings		Ok	ncel

Case:	The Case will default to the current case. To select a diff browse button; this will bring up a matter list. Select the						
Handler:	The Handler will default to the current handler; select an drop-down list, if required.	n alternative from					
Action:	Click the browse button for a list of incoming actions wil required action.	ll appear. <b>Select</b> t					
Document Class:	Input the correct document classification for the docum	ent being importe					
Diary Date:	Enables the user to select the dates to appear in the Cas Manager. There are different options in relation to usin	•					
	<b>Diary Date</b> - 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.						
	Search						
	File Name Class Type Document Da						
	Canned Documents     O6 Mar 2019						
	Image: Second						
Description:	<ul> <li>the document(s) which can be edited as above and also different date e.g. the document(s) date and the date th received.</li> <li>Input a <b>description</b> in the Description box; if you leave t name will become the description. This is used primarily</li> </ul>	he document was					
	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:						
	<ul> <li>convert documents to PDF if capturing documents scanned in;</li> <li>delete the Captured documents from original locat</li> <li>import documents to a single action (the alternativ document will get its individual action in the case d</li> <li>mark as complete the action into which the docum</li> </ul>	ion; e is that each liary);					

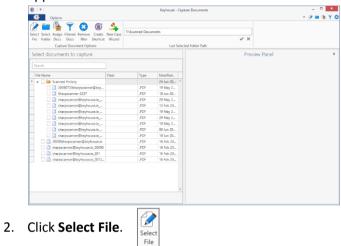
mark the document as having been generated.

 $\overset{\text{W}}{\longrightarrow}$  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

- 0
- 1. Click **Capture** on the Home tab in either the Case Diary or Task List. The following screen will appear.



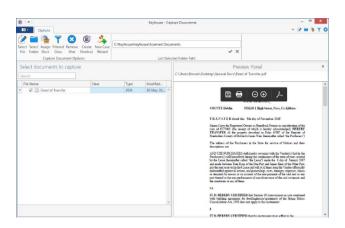
3. A Windows **Open** dialog box will appear. Browse and locate the file that is to be captured.

🔄 🏵 👻 🕆 🔳 Desktop 🔸					🗸 🖒 Search D	esktop	,P																		
Organise 🔻 New folder						l⊞ ▼ [	. 0																		
E Desktop	^	Name	Size	Item type	Date modified																				
Downloads Downloads Recent places This PC Desktop Documents Documents Documents		Brenda		File folder	05/03/2016 10:13																				
		CFI - Demo Workflow		File folder	19/10/2015 16:23																				
			Client Docs		File folder	05/05/2016 11:03																			
		🔒 Current Videos		File folder	05/05/2016 11:07																				
	l	l	l	l	l	🗼 Data Protection		File folder	13/05/2016 15:47																
						🎍 General Docs		File folder	30/05/2016 16:10																
Music						🌲 iSpring Analysis		File folder	05/10/2015 11:40																
Pictures							ł													🎍 Jira Issues		File folder	27/05/2016 11:04		
Videos								🎉 Keyhouse Training		File folder	25/06/2015 12:07														
Windows (C:)		🎉 Letters for Attachment for Tr		File folder	17/12/2015 15:35																				
RECOVERY (D:)		Scanned Documents		File folder	30/05/2016 15:07																				
development (\\khdata) (H:)		🎍 Snagit		File folder	01/07/2015 15:59																				
ntusers (\\khdata) (N:)		Version Control		File folder	05/05/2016 11:04																				
Reyhouse (\\brendapc) (T:)		Videos		File folder	23/11/2015 14:54																				
-	~	This PC																							
File name: Deed o		Till I illumine																							

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.

0	Open				
€ 🕘 ≖ 🕇 퉬 > General Docs			v ♂ Searc	h General Docs	,P
Organise 👻 New folder				80 ·	
Desktop	^ Name	Date modified	Туре	Size	
Covvnleads	<ul> <li>Case Importaisx</li> <li>Data Protection Questions.docx</li> </ul>	19/04/2016 17:04 01/10/2015 09:59	Microsoft Excel W Microsoft Word D	9 KB 12 KB	
	Deed of Transfer.docx     Deed of Transfer.pdf     Electricity BilLdoc	01/12/2015 14:18 30/05/2016 15:16 21/01/2016 11:47	Microsoft Word D Adobe Acrobat D Microsoft Word 9	17 KB 194 KB 102 KB	
	List of Exhibits.docx	27/01/2016 15:41 27/01/2016 15:42	Microsoft Word D Microsoft Word D	13 KB 13 KB 13 KB	
Pictures Videos Windows (C:)	<ul> <li>Statement of Charges.docx</li> <li>Statement of Evidence.docx</li> <li>Will of Jack Flynn.docx</li> </ul>	27/01/2016 15:41 27/01/2016 15:41 14/04/2016 12:56	/2016 15:41 Microsoft Word D		
RECOVERY (D:)     Gevelopment (\\khdata) (H:)     musers (\\khdata) (N:)     koyhouse (\\break tota) (N:)					
File name: Deed of Tr	v ansfer.pdf				Ŷ
				<u>O</u> pen	Cancel

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.

		Assign checked documents to Case/Matter	×
	Case/Matter	BLA001/0002	
	Handler	Admin	
	Action Code		
3	Document Class	Please select a document class	
	Assign Date	Please select a date [OR] Vise file date	
	Diary Description		
		Note: Leave description blank to use document name as the description	
	Capture settings	Remove captured documents from original location	o a single action
		Set captured document as complete	ited
	Save Settings	Ok	Cancel

## Provide the following information:

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

 $\checkmark$  Tip: Click Save Settings to keep these settings for future documents captured.

# 7. When finished click **OK**.

8. The following Dialog box opens.

Document Text			- c	) ×
MultiMedia Files, Dictations and Scanned PDFs do not contain text that your com	puter can read.			
You can enter relevant text (certain phrases, names or keywords) here that will be	stored against this document			
File: sharpscanner@keyhouse.ie_20100.pdf				
Options Do not show this dialog again Ignore all files with the PDF extension				
ghore all files with the PDF extension			(auto) %	
		00		
		Friends First begin former for and filter	COME PROTECTION PLAN	
		AGENCYUSE: Agency Number:	Agrice/Kens.	
		Antersenting and approximate an antice of the section of the secti		015 04
		H: 1 Hs Hs		
		REARING TOSEPH		
		Summe BLOGCS	and a second of the second sec	
		KOMME L CHUNCH STEPPT TERBY Co. LONCHARGO	Contact Markow at	
		Desistbilità COL COL 1930	and have to Brack and	-Samp-L.
		rieve ywaarscheitary styrestias, styre, plans or ideaso in techn 4 juur, fere wan yn sterdar?	d ka mamfuat Nea Ha	
		SECTION 2 PRODUCT DETAILS		
		Weekly benefit for all with benefit will	and: 55 Co y/ 65 Deferred period: 13 yd 53 y	/ vesto
		President type: Scatterident, or Specie Indexative: Yes: modeward by Scattering of Scattering Scattering by Scattering Scattering Scattering Scattering Scattering Scattering	Nter /	
Save	No Text Ignore			

- 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.

Home Case Reports	s Phone Log Maintain Setup H	lelp			
New Case Copy Case Move		GoTo			
🔍 Search/Open	letter				
All Matters     My Matters	Work Flow	Document Code	Document Name	Document Class	Document Description
Recent Matters	Circuit Court Civil Bill Procedure	CCBC101B	Letter informing Appellant of adjourned date	LTR	Letters/Interparty Correspondance
Contacts	Circuit Court Civil Bill Procedure	CCBC101C	Letter informing Witness of adjourned date	LTR	Letters/Interparty Correspondance
Associates	Circuit Court Civil Bill Procedure	CCBC102AB	Letter to Counsel enclosing fees	LTR	Letters/Interparty Correspondance
Advanced Search	Circuit Court Civil Bill Procedure	CCBC103F	Letter enclosing request for Judgement by Default of Defence	LTR	Letters/Interparty Correspondance
My Invoices	Circuit Court	LIT088E	Letter to County Registrar to stamp Motion & Affidavit	LTR	Letters/Interparty Correspondance
	Circuit Court	LIT090	Ltr Serving Motion on Def	LTR	Letters/Interparty Correspondance
My Cheques	Circuit Court	LIT091	Ltr Filing Affidavit of Service	LTR	Letters/Interparty Correspondance
Phone Log	Circuit Court	LIT092	Ltr Serving CB on Def Solr (CC)	LTR	Letters/Interparty Correspondance
Firm Undertakings	Circuit Court	LIT093	Ltr Chase Def Solicitors	LTR	Letters/Interparty Correspondance
Strong Room	Circuit Court	LIT094	Ltr to Client encl Notice of Part	LTR	Letters/Interparty Correspondance
Document Search	Circuit Court	LIT095	Ltr Consenting to Defence by Def (CC)	LTR	Letters/Interparty Correspondance
Template Library	Circuit Court	LIT096	Ltr to Solrs encl Reply Partic (CC)	LTR	Letters/Interparty Correspondance
	Circuit Court	LIT103	Ltr Barrister encl Brief	LTR	Letters/Interparty Correspondance

Work Flow 9

- 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

- 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

 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.

Work Flow 9	
	$\nabla^{\bullet}$
	45

Work Flow	9	Document
	(Blanks)	
System Act	(Non bla	inks)
-	General	Office Work
System Act	Sale	
Sale	System A	Actions
Sale		

- 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).

2	Clear Filter	N
I X	crear rincer	

# **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.

Home Case Reports	Phone Log Mai	ntain Setup Help			
New Case Copy Case Move Case maintenance		Conflict Search Case related GoTo			
Search/Open	Search				
All Matters	Code	Last Accessed	File Colour	Name	Description
My Matters	FLY001/0001	27 Jul 2015 14:35:20		Jack Flynn	Sale of House at: 4 The Mews, Rathfarn
Recent Matters	FLY001/0002	27 Jul 2015 14:35:15		Jack Flynn	Purchase of 16 The Haywain, Terenure,
•	ABA001/0002	27 Jul 2015 14:34:55		David Abraha	HIPS Negligence - October 2010
Contacts	TJF001/0001	27 Jul 2015 14:28:45		TJ Fox	Outstanding debt to PTSB Bank.
La Associates	BLA001/0001	27 Jul 2015 14:24:39		Gordon T. Bla	RTA Walkinstown Crossroads, G. Black
💐 Advanced Search	BLA001/0002	27 Jul 2015 14:24:32		Gordon T. Bla	2 Trinity Close, Rathgar, Dublin 6
🌐 My Invoices	BRE001/0001	27 Jul 2015 14:18:02		Mike Breeze	Broken left leg.
🖙 My Cheques	BES001/0001	21 Jul 2015 16:31:54		Business Time	Lease of Unit 33, Eastgate Avenue, Dubli
🌆 Phone Log	AAA001/0001	21 Jul 2015 12:55:18		AAA Securitie	Landlord Dispute
🇰 Firm Undertakings	ABA001/0001	21 Jul 2015 11:52:18		David Abraha	Family Law
📄 Strong Room	SIM001/0001	21 Jul 2015 09:53:43		Bart Simpson	Sale of House at: 4 The Mews, Rathfarnh
👩 Document Search	BRO001/0001	21 Jul 2015 08:44:21		Kevin Browne	Sale of 78 Somerset Road, Ealing, Lond
👘 Template Library	TJF001/0000	16 Jul 2015 16:23:06		TJ Fox	Document matter
	the sale and a second		~~~~~	~~~~ CV-~~	man and a mark and and

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.

1	Conflict of Interest Search	□ ×
	Conflict of Interest Search	
Case: ZAC001/0001 - Divorce		
In order for an item to appear in you	Criteria and up to 3 Search Criteria in each line. Search results, its details must match at least one line of Search Criteria rch Criteria in a line it must match all the Search Criteria in that line Conflict of Interest Search Add Criterion New Line Search Reset Cancel	
		al.

- 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.

		Conflict of Interest Search	□ ×
		Conflict of Interest Search	
Case: FLY001/	0001 - Road Traffic Acci	dent at Junction 9 on M50	
In order for an	item to appear in your Se	iteria and up to 3 Search forthrå in each line. each results, is de atal of criteria in each line. I criteria in a line it must match all the Search Criteria in that line Conflict of Interest Search	ria
	Jack Flynn	AND 9871235N	Criterion
<u></u>	← New Line	Search Reset Cancel	

- 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.

		Conflict of Interest Search	
ase: ZAC001/0001	- Divorce		Save Results to Case G Change Criti C Dutput Results to PDF
Capacity	Name	Details	
Client	Jack Flynn	Address: 10 Rose Lawns Blanchardstown Dublin 15 Salutation: Mr Flynn	
Matter	FLY001/0000 - Document matter	Address: 10 Rose Lawns Blanchardstown Dublin 15 Name: Jack Rynn	
Matter	FU/001/0001 - Road Traffic Acci	Address: 10 Rose Lawns Blanchardstown Dublin 15 Names Jack Rynn	

- 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.

c	ase: DOH001/0004 - Clai	im v Advance Automobiles		🔡 Save Results to Case	🔇 Change Criteria
	Capacity	Name	Details		
F	Matter		Address: 23 Green Street Drimnagh Dublin 12 Name: Frank Doherty		
	Matter	DOH001/0002 - Separation - D	Address: 23 Green Street Drimnagh Dublin 12 Name: Frank Doherty		
	Matter	DOH001/0003 - Purchase 55 Gr	Address: 23 Green Street Drimnagh Dublin 12 Name: Frank Doherty		
	Matter	DOH001/0005 - Employment L	Address: 23 Green Street Drimnagh Dublin 12 Name: Frank Doherty		

Search/Open 🧃 All Matters

📜 My Matters b Recent Matters Contacts

🕹 Associates

# **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

🔍 Search/Oper My Matte

- 1. Click on Search/Open on the Navigation panel. (The Strong Room for the current case may be accessed via the Nav
- 2. Click on Strong Room on the Nav listing all items in your strong roo

or second property

(	<ul> <li>Advanced Search</li> <li>My Invoices</li> <li>My Cheques</li> </ul>					
om	<ul> <li>Phone Log</li> <li>Firm Undertakings</li> <li>Strong Room</li> </ul>					
	🔞 Document Search 🎓 Template Library					
			Standard View			
	Status	Open/Closed	Destroy Date			
t to PTSB Bank.	1	0		^		
or Commerical Premises	1	0	30 Jun 2014	- 1		
h included additions for beneficaries	1		18 Jun 2014	-11		
for Section 23 Property	1	0	30 Jun 2014	- 11		
use at 4 The Mews, Rathfarnham. I for Flynn & Co	1	0	31 Dec 2015	- 11-		
ii tor Hýnh & Co		0	31 Dec 2015 18 Jun 2014	- H		
rrporation/Leasehold Agreeement for Turf Rights	1	0	18 Jun 2014	11		
por anony season and agreement of the roughs	1	-	30 Aug 2014	11		
eeds - Code CDA 1111	1	0	08 Aug 2014	11		

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

George	2	٨					Standard View
Item C	Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date
ABC00	00	ABB001/0001	PAP	George J Abbott/Personal Papers	1		
DEE		TAR001/0001	DEE	George Tarrant/Deeds for Commerical Premises	1	0	30 Jun 2014
ABBOO	010001	ABB001/0001	DEE	George J Abbott/Title Deeds for second property	1	0	18 Jun 2014
CDA11	111	ABB001/0004	DEE	George J Abbott/Title Deeds - Code CDA 1111	1	0	08 Aug 2014

- 4. Click **Cancel** to clear the search results. 3
  - ✤ Tip: You can sort column headings by click on the heading.

 $^{rac{M}{2}}$  Tip: Additional fields can be added to the Header Row to improve the search feature. See Pg 224Error! 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.
- Click on the Add File icon on the Home tab. A screen with the title Strong room Add new File will 3. appear.

Fields marked with an asterisk are required.

Noode Attention:	Tick if the item needs to be		Strong room	- Add new File		×
Neeus Allention.		General Item Dia				
	checked.		Needs Attention			IN
Item Type:	Select the Item Type from the	Item Type *	Select Item Type	Item Code *	Enter item code	
	drop-down list.	Client Code Client Name	ABA001	Matter Code Description		⊻ x
Item Code:	Input an item Code or if left	Item Description *	David Abrahams Deeds to Family Home at 1 High Street, Kells,		Family Law	
	blank, the system will					
	generate a code.	Location	Select Item location	Box No	Enter box number	
Client Code:	See also Matter Code below.	Search Code	Enter search code	Fee Earner	Select fee earner	~
Matter Code:	If the code of the current	Entry & Destroy		estroy Date	Please select date	<b>v</b>
	matter is not displayed, or	Open O C	Closed			
	you wish to select a different					
	matter, use the browse					
	button to browse the matter					OK Cancel
	list.					
Client Name:	If the name of the Client is not di	isplayed,	, or you wish to se	lect a	different cli	ient,
	use the browse button to browse	e the clie	ent list.			
Description:	Uses the Matter Description					
Description:	Input a description of the item.					
Location:	Select a storage location from the	e drop-d	lown list.			
Box No:	Likewise, select a Box number fro	om the d	lrop-down list.			
Search Code:	Input a search code					
Fee Earner:	Use the drop-down list to select	the Fee	Earner with respo	nsibilit	ty for the ite	em.
Entry Date:	The date on which the item was		•		•	
Destroy Date:	The date, if any, on which the ite		•	-	,,	
Open/Closed:	This will <b>default</b> to open.					
openy closed.	ing win <b>uclaur</b> to open.					

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

	Strong room - Add new File		× (	1	Strong	room - Add new File		×
Genera Deeds Dem Diary Client Info				General Wills	IPm Diary Client Info			
Item Type * Deeds	✓ Item Code *	Enter item code		Item Type * 🤇	Wills 🗸	Item Code *	Enter item code	
Client Code Select client code	Matter Code	Select matter code		Client Code	Select client code	Matter Code	Select matter code	~
Client Name Client Name	Description	Matter description		Client Name	Client Name	Description	Matter description	

**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.

	Strong room - Add new File	×
General Deeds	Item Diary Client Info	
Deeds Address	Enter the address	Accountable Trust Receipt
Date *	Please select date V Due Date Please select date V	
Comment	Enter the comment	
Property Owner	Enter the property's Owner	
From Whom	Select From Whom	
	Enter From Whom	
To Whom	Select To Whom	
	Enter To Whom	
		2
		OK Cancel

- 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.

			Strong room ·	om - Add new File						
General Will	s Item Diary	Client Info								
Testator	Enter the test	ator		Executor 1	Enter the executor 1					
Enter the testa	ator address			Enter the e	executor 1 address					
Will Date	Please select (	date	~	Executor 2	Enter the executor 2					
Est Estate	0.00			Enter the e	xecutor 2 address					
Date of death	Please select (	late	~							
					Enter the executor 3	-1				
						-1				
				Enter the e	executor 3 address					
				Executor 4	Enter the executor 4	-1				
				Enter the e	xecutor 4 address					
					QK	ancel				

- 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.

٢	Strong room - Change File info										
General	Wills Item	History	Item Diary	Client Info	Attachment/Documents						
	Date Entered	Docum	ent		Version	Doc Class	Track	File Path			
										^	
<										>	
									<u><u>o</u>k</u>	Cancel	
										· · · · ·	

5. Right click and select Add and then select Attachment

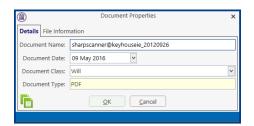
	Strong room - Change File info											×			
General	Wills	Item	History	Item Diary	Cli	ent I	nfo	Attachment/Documents							
	Date Ent	ered	Docume	nt				Version	Doc Clas	s Track	File Path				
				Add		×á		chment						^	
			8	Edit				to Folder							
				Delete	- 1	~									
			*	Cut											
			Her.	Сору											
				Paste											
			0	History											
														~	
<														>	
												0	ж	Cancel	
					-										

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

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

)	Document Classes	
/ × ·	P +	Include Retir
Search		
Class Code	Class Description	Retired
GEN	General	N
INS	Instruction Sheets	N
LTR	Letters/Interparty Correspondance	N
MED	Medical Reports	N
MEM	Memo	N
MOT	Motion papers	N
MSG	Email Message	N
NOT	Notes	N
OPI	Opinions	N
PLE	Pleadings	N
REA	Research	N
REP	Reports	N
REQ	Requisitions	N
REV	Revenue Form	N
SHA	Shareholders Agreement	N
WIL	Will	N
<		>
		Select Cancel

- 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.

Document Mana	Document Manager							
•	Do you want to update the Attachment Name as same as Subject?							
Do not sho	w again and remember the last choice I made							
	<u>Y</u> es <u>N</u> o							

- 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 ot be possible to replace the do will need to be created.

w Permanently it will no cument. A new entry

if you	Confirm below, this item will be SIGNED OUT TO YOU!	
For Who*		~
	□ Withdraw Permanently □ Final Receipt	
Comments*		^
		~
	Confirm Withdraw Cance	2
	Strong Room - Withdraw File	
	Strong Room - Withdraw File	×
You wi	II find Will of Kenneth Bunson at File Room, Box No: 4	
	Q Ok	

Strong Room - Withdraw File

### **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.

		5	Strong Room - Replace File			×				
Item Code	0	0000123131								
Description	G	ordon T.	Black/RTA Walkinstown Crossroad	5, G	. Black					
Client Code	BI	A001								
Location	Fi	le Room				~				
Box No	ſ			7						
	Ľ	_			Cancel					
		Code	Location		Januer					
		BOX1	Box 1	$\sim$						
		BOX2	Box 2							
		DUB	Dublin							
	_	OFF	Offsite							
	Þ	STR	File Room							
				~						
	_									

**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

	Strong Room - Replace File 🗙
Item Code	0000123131
Description	Gordon T. Black/RTA Walkinstown Crossroads, G. Black
Client Code	BLA001
Location	File Room
Box No	4
	<u>Q</u> K <u>C</u> ancel
	Strong Room - Replace File 🗙
Pleas	se replace the item Will of Kenneth Bunson to BOX2, Box No.4
	Ok

- 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.

Print Add File Char	<u>)</u> (	ete File	ain Setup He Vithdraw File F Item Enge	Request File Hist	ory Diary					
Search/Open	Search									Standard View
	Attn	ATR	Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date	
All Matters			ABC000	A88001/0001	Papers	George J Abbott/				
My Matters		~	DEE	TAR001/0001	Deeds	George Tarrant/	1	0	30 Jun 2014	
Recent Matters			ABB0010001	A88001/0001	Deeds	George J Abbott/	1	0	18 Jun 2014	
Contacts			12345		Backup T	Friday 1 Backup	1	0	01 Jan 2020	
Associates			AAA0010001	AAA001/0001	Wills	AAA Securities Lt	1	0	31 Oct 2014	
Advanced Search			AAA0010001	AAA001/0001	Wills	AAA Securities Lt	1	0	31 Oct 2014	
My Invoices			123123	AAA001/0001	Wills	AAA Securities Lt	0	0		
My Cheques			test	OWE001/0001	Deeds	Peter Owen/Test	1	0	30 Jun 2014	
Phone Log			LEA1811	EVE001/0003		Ever Green Insur	1	0	18 Jun 2014	
Firm Undertakings			0000123124	AAA002/0002	Compan	AAA Worldwide	1		18 Jun 2014	
Strong Room	- A		0000123125	AAA002/0002	Papers	AAA Worldwide	1		18 Jun 2014	
Document Search			0000123126	FEN001/0001	Wills	Richard Fennell/	1		18 Jun 2014	
Template Library			0000123127		Backup T	Year End Backup	1		18 Jun 2014	
			D1234	CUL001/0001	Deeds	Ann Marie Cullen	1		30 Aug 2014	
			0000123128	RYA002/0001	Wills	Margaret Ryan/	1		18 Jun 2014	
			0000123129	AAA001/0001					19 Jun 2014	
			0000123130		Backup T	Year end backup	1		19 Jun 2014	
			CDA1111			George J Abbott/		0	08 Aug 2014	
			0000123131	BLA001/0001	Deeds	Gordon T. Black/	1	0		
	• 🔥	1	0000123133	BAR002/0001	Deeds	Kevin Barrett/Sal	1	0		
		~	0000123134			Jane Doe - Deeds		0		
			0000123135		Wills	Will for Jane Doe	1	0		

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.



🕒 Strong Room

				Strong roo	om - History				
Ite	em History Atta	chment/Documen	ts						
Search									
F	By Who	For Who	Out Date	Out Time	In Date	In Time	Comment	Item Code	
•	Brian Sweeney	Brian Sweeney	18 Jun 2014	17:05:06	18 Jun 2014	17:09:50	Work on the file	0000123125	^
	Brian Sweeney	Martina Wint	18 Jun 2014	17:07:06	18 Jun 2014	17:09:50	Working on the file	0000123125	
Γ	Brian Sweeney	Brian Sweeney	18 Jun 2014	17:09:29	18 Jun 2014	17:09:50	working on the file	0000123125	
	Brian Sweeney	Brian Sweeney	18 Jun 2014	17:10:13			today	0000123125	

5. Click Cancel to exit this screen.

### 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

He	ome Case	Reports Pho	ne Log Mair	ntain Setup	Help		
#				2			
Print	Add File	Change File Maintain Items	Delete File	Withdraw File Item E		History Item H	Diary listory

# 3. The following dialog box appears.

			Strong room -	Add new File			×
General	Item Dia	ry					
		Needs Attention					IN
Item Type	e *	Select Item Type	~	Item Code *	Enter item code		
Client Co	de	Select code		Matter Code	Select code	~	x
Client Na	me	Name		Description	description		
Item Des	cription *	Enter Item Description					
Location		Select Item location	~	Box No	Enter box number		
Search Co	ode	Enter search code		Fee Earner	Select Fee Earner		~
Entry 8	Destroy I	Date					
Entry D	Date plea	se select date	V De	stroy Date	Please select date		~
Ope	n O C	losed					
						<u>o</u> k <u>c</u>	ancel

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

earch	New						
Code	Name	Last Accessed	Address	Phone	Fax	Email	
FLY001	Jack Flynn	30 Apr 2018	10 Rose Lawns Blanchardstown D	+35315647		jack@flynn.com	
KEO003	Sam Keogh	27 Apr 2018	Main Street Bray	+353123424	+35312343	sam@keyhouse.ie	
MCG001	Julie McGuire	27 Apr 2018	12 Esker Manor Lucan Co. Dublin	+35316789			
ABA001	David Abrahams	27 Apr 2018	123 Mayfair Street Dublin 2	+35312902	+35312921	d.abrahams@gmail.com	
ABB001	George J Abbott	27 Apr 2018	60 Somerset Road, Ranelagh, Dub	+35315656	+35315777	gabbott@iol.ie	
BLA001	Gordon T. Black	27 Apr 2018	23 Ellis Park Rathmines Dublin 6	+35314766	+35317788	g.black@iol.ie	
QUI001	Alan Quinn	27 Apr 2018	45 Herbert Park, Donnybrook, Du	+35316677		alan.quinn@home.ie	
WAL001	Margaret Walsh and Dolores Walsh	27 Apr 2018	23 Main Street Cork	+35321665			
WOR001	Workflow Services Limited	27 Apr 2018	103 Baker Street Ranelagh Dublin 6	+35314556		info@worflowservices.ie	
BEC001	Angela Beck	27 Apr 2018	26 Church Street Rathgar Dublin 6.	+35312339		a.bacon@iol.ie	
AAA001	AAA Securities Ltd	17 Apr 2018	44 Main Street Dun Laoghaire Co	+3531 +353	2339999 2	tday@kkk.ei	
WEI001	James Weis	28 Mar 2018	22 Nutley Lane Donnybrook Dubli			james.weis@gmail.com	
ZHA001	Chow Ming Zhang	28 Mar 2018	25 Willow Park Drive Blackrock Co			C.Zhang@info.net	
DEM001	John Demoman	28 Mar 2018	23 Fleet Street Milltown Dublin 6	+35316766		jdemoman@hotmail.com	
FEN001	Richard Fennell	28 Mar 2018	Roslyn Torquay Road Foxrock Du				

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

Î	Maintair	n New Client	×
	e new Client's details below		
Client Code *	000001		
Client Name *	Enter name		
Salutation	Enter salutation	PPS NO	Enter PPS number
Address	Enter address		
Telephone		Fax	
	Enter telephone		Enter fax number
Mobile	Enter mobile number	Email	Enter email ID
Fee Earners *	Select Fee Earner	Secondary Email	Enter secondary email ID
	Anti money laundering checked		
			Create Cancel

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.

	Strong	g room - ,	Add new File		×
General Wills I	tem Diary Client Info				
	Needs Attention				IN
Item Type *	Wills	~	Item Code *	Enter item code	
Client Code	MUR003		Matter Code	Select code	▼ X
Client Name	Alan Murphy		Description	description	
Item Description *	Will for Alan Murphy date 5 April 2018	3			
Location	File Room	~	Box No	4	
Search Code	Enter search code		Fee Earner	Brenda Hartley	~
Entry & Destroy	Date				
Entry Date 03 M	Иау 2018	✓ Des	troy Date	Please select date	~
🖲 Open 🛛 C	losed				
					OK Cancel

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

e	arch									
	Attn	ATR	ltem Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date	Fee Earner
۶			0000123133		Wills	Alan Murphy/Will	1	0		Brenda Hartle
			0000123132	ABB001/0005	Deeds	George J Abbott/	1	0		Brian Sweeney
			0000123131	BLA001/0001	Deeds	Gordon T. Black/	1	0		Brian Sweeney
			CDA1111	ABB001/0004	Deeds	George J Abbott/	1	0	08 Aug 2014	Mark Kelly
			0000123130		Backup T	Year end backup	1		19 Jun 2014	Brian Sweene
			0000123129	AAA001/0001	Compan	AAA Securities Lt	1		19 Jun 2014	Brian Sweene
			0000123128	RYA002/0001	Wills	Margaret Ryan/	1		18 Jun 2014	Brian Sweene
			D1234	CUL001/0001	Deeds	Ann Marie Cullen	1		30 Aug 2014	Brian Sweene
			0000123127		Backup T	Year End Backup	I.		18 Jun 2014	
			0000123126	FEN001/0001	Wills	Richard Fennell/	I		18 Jun 2014	Brian Sweene
			0000123125	AAA002/0002	Papers	AAA Worldwide	I.		18 Jun 2014	Brian Sweene
			0000123124	AAA002/0002	Compan	AAA Worldwide	I.		18 Jun 2014	Brian Sweene
			LEA1811	EVE001/0003	Lease A	Ever Green Insur	1	0	18 Jun 2014	Brian Sweene
			test	OWE001/0001	Deeds	Peter Owen/Test	I.	0	30 Jun 2014	Brian Sweene
			123123	AAA001/0001	Wills	AAA Securities Lt	0	0		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.

0						Keyh	ouse Case M	anagement (BH - Bienda Hartiey - 0000 / 0600)	ch (Ctrl + Q)	- 🗆
Home Case Report	s Phone Log Maintain Setup Help				_					
🖹 🚔 🛈	🙀 🔞 🗊 🕯	Ö (	Š.	Ö	5					
ew Item  Print  Captu	are Generate Complete Action Test Doc Assist Sta Documents	rt Timer New T	ime Slip Accounts	Start Blani	k Timer					
Client/Case		ack Flynn								el: 01-564
Case Diary	-	Road Traffic Ac	cident at	Junction 9	9 on M50				F/	/e: CN
Document Manager	Action 🔍	a 😒 Searc	ch						Standard Viev	w + 📩
Current Client Details	General Office Work	~		Date		Time	Handler	Synopsis	Action Co.	-
Extra Case Details	Initial Attendance	▲ <b>#</b>		16 M	lar 2018	16:53	BH	Letter to Client	G02	P ^
Associates	Letter to Client ?			# 24 N	ov 2017	09:31	CN	Letter to Client	G02	P
Critical Information	Letter to Solicitor ?	6		05 M	lar 2018	00:00	CN	Receipt created, BATCH NO : 3340	PR01	P
Y Know Your Client	Letter to Barrister ?	<b>S</b>		05 M	lar 2018	00:00	CN	Receipt created, BATCH NO: 3339	PR01	P
A/c Ledger		. 🥑		8 31 M	lay 2017	16:15	CN	Letter to Barrister encl Medical Report	G07	P
Time Ledger	Letter to Lending Institution ?	6		8 31 M	lay 2017	16:13	CN	Letter to Barrister requesting Opinion	G07	P
Debt Ledger	Letter to Local Authority ?	6		8 31 M	ay 2017	11:39	CN	AUTHORISATION	G22	P
Reserve Ledger	Letter to Doctor ?	<b>S</b>		8 31 M	lay 2017	11:28	CN	Exibits to Affidavit of Enda Kenny	G22	P
Undertakings	Letter to insurance Company ?	6		8 31 M	lay 2017	11:22	CN	Email to Chief State Solicitor	G22	P
Strong Room	Letter to Client Contact?	6		8 31 M	lay 2017	11:14	CN	Email from Chief State Solicitor	G22	P
		. 🥑		8 31 M	ay 2017	11:03	CN	Letter to Chief State Solr	G22	P
	Memo?	۲.		8 31 M	lay 2017	10:57	CN	Letter to Garda Ombudsman	G22	P
	Attendance Sheet?	6		8 31 M	ay 2017	10:46	CN	Letter to Garda Commissioner	G22	P
	Distant		~	L RIM	lay 2017	marco	in	Sump of Valueskan Annual Contraction of Contraction		man

### 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.
FLY001/0001 00:00:04	Current Clock Details – Matter Code and amount of time spent.
Α	Auto post timer – Ensures user post details before moving to a new matter.
$\checkmark$	Syncs timer with current matter – Timer will follow as user moves from matter to matter.
<u></u>	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.
<b>—</b>	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.

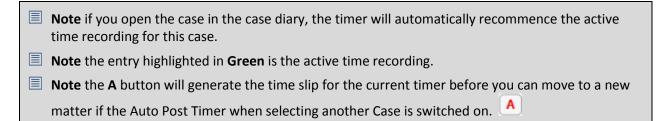


- 3. The clock will **automatically** start recording. By having the box ticked the clock will follow you as you move from case to case.
- 4. To pause the timer, click on the **clock** at the left of the timer. The clock will stop, and an orange symbol will appear next to it.



- 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 entry already listed in your timer click on lease code.



🕞 BEC001/0003 01:34:21 🗛 🗸 🗧							
Matter Code		Time	Client Name	Matter Details	Comment	Date	
FLY001/0001	🕓	00:02	Jack Flynn	Jack Flynn Road Traffic Ac		03 May 2018	
FLY001/0001	🕓	00:03	Jack Flynn	Jack Flynn Road Traffic Ac		03 May 2018	
MCG001/0001	🕓	00:10	Julie McGuire	Julie McGuire Sale of 2 Cl	Dictation	03 May 2018	
WAL001/0001	🕓	00:30	Margaret Walsł	Margaret Walsh and Dolo	Demand & Dr	03 May 2018	
KEO003/0001	🕓	00:45	Sam Keogh	Sam Keogh Sale of Plot 21		03 May 2018	
BEC001/0003		01:34	Angela Beck	Angela Beck Sale of 3 Mai		03 May 2018	

### **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.

	Post Time 🗖 🗙
FLY001/0001	Select Matter
Jack Flynn Road Traffic Accident Administration Time	t at Junction 9 on M50
Time Recorder	B Hartley 🔽 Retain selected Time Recorder
Date	12 Jun 2018
Time	Minutes     O     O     Units     O
Time/Charge	Time     O Charge
	Hours Rate Charge
	0.0000 X 300.00 = 0.00 V Is Chargeable
Task	Document Drafting Suggested Narrative
Document Drafting	
	Save And New     Save & Post     Save & Einish     Cancel

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.

G FLY001/00	01			00	0:02:02 A 🗸	) 🛉 🕂 🔍 – ×
Matter Code		Time	Client Name	Matter Details	Comment	Date
FLY001/0001	🕓	00:02	Jack Flynn	Jack Flynn Road Traffic Ac		03 May 2018
FLY001/0001	🕓	00:03	Jack Flynn	Jack Flynn Road Traffic Ac		03 May 2018
MCG001/0001	🕓	00:10	Julie McGuire	Julie McGuire Sale of 2 Ck	Dictation	03 May 2018
WAL001/0001	🕓	00:30	Margaret Walsł	Margaret Walsh and Dolo	Demand & Dr	03 May 2018
KEO003/0001	🕓	00:45	Sam Keogh	Sam Keogh Sale of Plot 21		03 May 2018
BEC001/0003	🕓	01:45	Angela Beck	Angela Beck Sale of 3 Mai		03 May 2018

- 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 cas button to bring up the matter list and select a different case if required.	<b>FLY001/0001</b> Jack Flynn	Domatically displayed. Click the Select Matter				
Date:	By default, the date the time was recorded will be shown. <b>Change</b> if required.	Time Time/Charge Task	• Minutes         0 (2)         Units         0.00 (2)         Hours         0.00 (2)           • Time         Charge           Hours         Rate         Charge           0.0000         X         300.00         =         0.00         V is Chargeable           Document Drafting         V         Suggested Narralive				
Time/Charge:	Use the <b>option buttons</b> to select whether this entry should be charged on the basis of time spent or as a set charge.		Save And New Save & Post Save & Enish Cancel				
Minutes/Hours/Days:	This will show the time rec	orded a	nd can be amended if required.				
Hourly Rate:	The hourly rate will display	the <b>def</b>	ault rate for this handler and case.				
Chargeable:	Check the box if this time is as a default setting by the S	-	able or uncheck it if it is not. This can be set Administrator.				
Task:	Use the <b>drop-down</b> arrow	Use the <b>drop-down</b> arrow to select from a list of tasks.					
Comment:	Input a narrative to describ	oe the ti	me 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.

۱	Post Time 🗖 🛪
FLY001/0001	Select Matter
Jack Flynn Road Traffic Accident	at Junction 9 on M50
Administration Time	
Time Recorder	Barbara Brennan 💌 🗹 Retain selected Time Recorder
Date	18 Jun 2018 🗸
Time	Minutes     20     O     Units     3.33     O     Hours     0:20     O     Days     0.04     O
Time/Charge	Time     O Charge
	Hours Rate Charge
	0.3333 X 350.00 = 116.66 🗹 Is Chargeable
Task	Document Drafting Suggested Narrative
Document Drafting	
Client is n	ot approved for AML Save And New Save & Post Save & Save & Finish Cancel

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.

	Home Case Reports Phone Log Maintain Setup	
	🚔 🏟 🍯	(Blank Timer) 00:00:19 (A) 🗹 🖢 🛖 💽 — X
	Print New Time Slip Start Timer Start Blank Timer Post Day Book Day book	
2.	To pause the timer, click on the clock.	(Blank Timer) 00:28:39 A 🗹 🛓 💠 🔍 – X
	1 ,	
	<b>NOTE:</b> It is also possible to start a new timer in	n an existing case.
3.	Click on the Start timer tool on the Home tab. T	The current case
	will automatically be selected. This may have to	
4.	Click on the <b>Green Plus</b> to add an empty timer.	
	ener en enere en een naer to dad un empty unien	
_		

- 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.

		Post Time	□ ×
Click here to selec	ct matter		Select Matter
Administration Time			
Time Recorder	Carol Nolan	Retain selected Time Recorder	
Date	22 Jun 2016	~	

7. Input/Amend the following details as required:

Matter:	No case code will be displayed. Click the <b>Select Matter</b> 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 <b>option buttons</b> 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 <b>default rate</b> 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.

			Ρ	ost Time					□ ×
Click here to selec	t Matter							Sele	ct Matter
Administration Time									
Time Recorder	Carol Nolan		~	🗌 Retain sel	ected Time R	ecorder			
Date	12 Jun 2018		*						
Time	Minutes	0 🗘	⊖ Units	0.00 🗘	⊖ Hours	0:00	○ Days	0.00	0
Time/Charge	<ul> <li>Time</li> </ul>	0	Charge						
	Hours	]	Rate		Charge				
	0.0000	<b>X</b> 150.0	0	=	0.0	Is Charge	able		
Task	Select a task		~					Suggested	Narrative
Task not s	pecified			Save	And New	Save & Post	Save	ave & Finish	Cancel

### 3. Input or Amend the following details

Matter:	The case code will default to the current matter; to change the case, use the <b>select matter</b> 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	<b>Using</b> the <b>option buttons</b> provided, set if the time recording is to be charged by time or a set charge.
Hourly Rate:	The hourly rate will display the <b>default rate</b> 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 <b>drop-down arrow</b> to reveal a list of tasks. <b>Click</b> 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:

	Post Time 🗖 🗸	c
Administration Time Non Chargeable Code	Select non chargeable code	
Time Recorder	B Hartley 🗸 Retain selected Time Recorder	
Date	12 Jun 2018	
Time	Minutes     O     O     Units     O	
	Suggested Narrative	
Task not sp	Decified     Save And New     Save & Post     Save & Einish     Cancel	

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

		Po	ost Time 🗖 🛛	×
Administration Time				
Non Chargeable Code	Office Work	*		
Time Recorder	B Hartley	~	☑ Retain selected Time Recorder	
Date	12 Jun 2018	¥		
Time	● Minutes -75 🗘	OUnits	-12.50 OHours -1:15 ODays -0.17 O	
			Suggested Narrative	)
Office Work				
				_
			Save And New         Save & Post         Save         Save & Einish         Cancel	J

4. Add an additional narrative, if required and click Save.

<b>NOTE:</b>	It is not possible to restart a negative timer. The following error message will appear.
	Cannot Restart a Timer with Negative Time
	The Timer you are trying to restart has a negative Time value. You cannot restart a Timer with a negative Time value. You can delete this timer or you change this timer to give it a positive Time value before restarting it.

### **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

())) FLY001/0001	Post Time	Select Matter
Jack Flynn	at Junction 9 on M50	Select Matter
Administration Time		
Time Recorder	Brenda Hartley	
Date	28 Feb 2018	
Time	Minutes     25      Units     4.17      Hours     0:25     Days	0.06 🗘
Time/Charge	Time     Charge	
	Hours Rate Charge	
	0.4167 X 200.00 = 83.30 S Is Chargeable	
Task	Document Drafting	Suggested Narrative
Document Drafting	Search	
	DESCRIPTION	
	Letter to Solicitor ?	
	Letter to Doctor ?	
	Meeting	
L	Save Phone Call	
	Jave	

- 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

		F	ost Time	□ ×
FLY001/0001				Select Matter
Jack Flynn Road Traffic Accident	t at Junction 9 on M	50		
Administration Time				
Time Recorder	B Hartley	~	Retain se	elected Time Recorder
Date	12 Jun 2018	~		
Time	Minutes	10 🗘 🔿 Units	1.67 🗘	O Hours 0:10 Days 0.02
Time/Charge	<ul> <li>Time</li> </ul>	○ Charge		
	Hours	Rate		Charge
	0.1667	300.00	=	50.00 🗹 Is Chargeable
Task	Document Drafting	•		Suggested Narrative
Document Drafting	- Drafted Affidavit	No Suggestions		
		Add to Narrative		
		Cut	Ctrl+X	
		Сору	Ctrl+C	
		Paste	Ctrl+V	
		Delete	Del	
		Select All	Ctrl+A	
			Save	And New Save & Post Save Save & Finish Cancel

- 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.

	Post Time	□ ×
FLY001/0001		Select Matter
Jack Flynn Road Traffic Accident Administration Time	at Junction 9 on M50	
Time Recorder	B Hartley	
Date	12 Jun 2018	
Time	Minutes     10     O     Units     1.67     O     Hours     0:10     O     Days	0.02 🗘
Time/Charge	Time     Charge	
	Hours Rate Charge	
	0.1667 X 300.00 = 50.00 ✓ Is Chargeable	
Task	Document Drafting	Suggested Narrative
Document Drafting		
	Drafted Motion for Discovery	
	Drafted Affidavit of Means	
	Drafted Letter to Client	
	Drafted Letter to Opposition Solicitor	
	Save And New Save & Post Save Save	ve & Finish Cancel

6. Continue until all required narratives are entered.

7. Alternatively, start typing the entry and once the list appears, select the required entry.

	Post Time	□ ×
FLY001/0001		Select Matter
Jack Flynn Road Traffic Accident	nt at Junction 9 on M50	
Administration Time		
Time Recorder	B Hartley Retain selected Time Recorder	
Date	12 Jun 2018	
Time	Minutes     10     O     Units     1.67     O     Hours     0:10     O     Days	0.02 🗘
Time/Charge	Time     Charge	
	Hours Rate Charge	
	0.1667 X 300.00 = 50.00 V Is Chargeable	
Task	Document Drafting 🗸	gested Narrative
Document Drafting	- Drafted Moti	
	Drafted Motion for Discovery	
	e And <u>N</u> ew Save & Post Save &	inish <u>C</u> ancel

8. Repeat until all required narratives are entered

# How to View the Day Book

- 1. From the **Timer c**lick on **View All** on the timer tool bar.
- 2. Alternatively click the Time Costing option from the navigation buttons

Tasks
Search/Open
Client/Case
Time Costing

3. The Day book will appear.

Home Case Rep	orts Phone Log M	Asintain Setun	Help	Keyhouse Case Management (CN - Carol Nolun - 0000 / 0000)		Quick Search (Ctrl + Q)	) - [
			net.				
<b>_</b>	• •						
New Time Slip St	art Timer Start Blank T Day book	imer Post Day Book					
ime Costing	Day Book Summ	hary					
Day Book	Chargeable 0	06 Non-Chargeab	le 00:00 Total 09:06	Remaining 00:00		Handler Carol Nolan	
Report	Date	Matter Code	Client Name	Matter Details	Comment	Case Time	Charge
WIP by Bill Date	Date 27 Jul 2015		TJ Fox	TJ Fox. Outstanding debt to PTSB Bank.	Demand & Draft Proceedings	00:01	charge
op WIP	27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox Outstanding debt to PTS8 Bank.	General Advice	00:30	7
board	27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox Outstanding debt to PTS8 Bank.	Court Attendance	01:00	150
	27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox Outstanding debt to PTSB Bank.	Dictation	00:30	75
	27 Jul 2015	TJF001/0001	TJ FOX	TJ Fox Outstanding debt to PTSB Bank.	General Advice	02:00	300
	31 Jul 2015					00:01	
	31 Jul 2015					00:01	0
	31 Jul 2015					05:03	
Tasks							
Tasks							
Search/Open							

# 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

- 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.

Accou		Suide Write-Off me Ledger									
Client/Case	Case: BLA001/0001	Gordon T. Black RTA Walkinstown Crossroads, G. Black									rel: 01 4 7e: BS
ase Diary locument Manager	Search	HUR HERALDONI CLUB OKAS, G. DECK									ndard V
urrent Client Details urrent Case Details	Date	Comment	Time or Charge	Time	C/N-C	Charged	Billed Amount	Invoice No	Task	T/R	
xtra Case Details	03 Aug 2010	Billed Fees: 60000	Bill		0 Chargeable	(60,000.00)	0.00		0 BILLED	Brian Sweener	
ssociates	09 Nov 2010	For taking initial instructions and memoing the same.	Time		4 Chargeable	57.50			0 Document Drafting	Brian Sweeney	
itical Information	14 Mar 2011	General	Time		8 Chargeable	75.00			218 General Advice	Brian Sweeney	
now Your Client	17 Apr 2011	Attendance	Time		6 Chargeable	107.50			218 Attendance	Brian Sweeney	
	20 Apr 2011	Advice	Time		0 Chargeable	250.00			218 Advice	Brian Sweener	
/c Ledger	24 Apr 2011	Letter	Time		0 Chargeable	42.50			218 Letter Drafting	Brian Sweener	
me Ledger ebt Ledger	30 Apr 2011	Photocopying	Time		0 Chargeable	125.00			218 Photocopying	Brian Sweener	
eor Ledger	12 May 2011	Billed Fees: 600.00	Bill		0 Chargeable	(600.00)	0.00		218 BILLED	Brian Sweener	
ndertakings	12 May 2011	Billed Fees: 600.00	Bill		0 Chargeable	(600.00)	0.00		218 BILLED	Brian Sweener	
internationality a	15 May 2011	Review medical report of GP for PIAB application	Time		0 Chargeable	207.50			0 Document Drafting	Brian Sweener	
trong Room	17 May 2011	Phone call with client updating him of the status	Time		3 Chargeable	15.00	0.00		0 General Advice	Martina Winte	
	21 May 2011	Client Meeting to clear up issue in medical report	Time		5 Chargeable	145.00			0 Client Meeting	Brian Sweener	
	30 May 2011	Advice client of possible next action and agree next step.	Time		0 Chargeable	125.00	0.00		0 Advice	Brian Sweener	
	10 Jun 2011	Completed PIAB Application and draft form for approval	Time		0 Chargeable	250.00	0.00		0 General Advice	Brian Sweener	
	19 Jun 2011	Telephone call with client regardind gueries on PIAB form.			0 Chargeable	42.50	0.00		0 Telephone Attendance	Brian Sweener	
	23 Aug 2011	Amending Letters/Document	Time		0 Chargeable	51.00			0 Phone Call	Martina Winte	
	01 Sep 2011	Finalise PIAB application and lodge same with PIAB	Time		5 Chargeable	12.00	0.00		0 Phone Call	Martina Winte	ers
	08 Sep 2011	Letter informing client of costs to date	Time		5 Chargeable	24.00	0.00		0 Phone Call	Martina Winte	ers
	29 Sep 2011	Draft Letter to Garda requesting technical information	Time		9 Chargeable	30.00	0.00		0 Phone Call	Martina Winte	ers
	11 Oct 2011	Review File and Draft Letter to client re status	Time	1	5 Chargeable	25.00	0.00		0 General Advice	Stephen Keog	ąh
	11 Oct 2011	Phone call with client re more queries	Time	1	0 Chargeable	17.00	0.00		0 General Advice	Stephen Keog	gh
	11 Oct 2011	Client Meeting re special damages	Time	2	5 Chargeable	42.00	0.00		0 Client Meeting	Stephen Keod	ąh
	21 Nov 2011	Phone Call re Medical Report	Time	1	5 Chargeable	75.00	0.00		0 Phone Call	Martina Winte	ers
	22 Nov 2011	Client Meeting	Time	1	5 Chargeable	62.50	0.00		0 General Arbice	Stenhen Kenr	ah
	Summary Total WIP (Hrs:Mins):	22:05								WIP Value:	5,0
	Total Recorded (Hrsd									Recorded Value:	6,
Tasks	Total Chargeable (Hr:									Chargeable Value:	5,6
	Total Non-chargeable									Non-chargeable Value:	
Search/Open	Write Off (Hrs:Mins):	0:00								Write Off Value:	
Client/Case										Billed: Current Profit/Loss:	60,6 54,4

 ${}^{{}^{{}^{{}^{{}^{{}^{{}}}}}}}$  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.

	<u> (</u>	Add
	٩	Edit
	۹	Delete
	٢	Start Timer
	•	Go To Case Diary
L		GO TO Case Dialy

**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.

<b>(</b>			Draft Invoice				□ ×	
V Ok	Message:							
Cancel	Request Type: O	Credit Note	Oper	n Invoice	Bill Sent	Invoid	ce / Bill No: (not invoiced)	
Cancel	– Matter Details —							
	Matt	ter: FLY001/0002		Jack Flynn			Bills: 0.00	
	Fee Earn	er: Carol Nolan	¥				Outlay: 0.00	
	Descriptio	on: Purchase of 16 The Hay	wain, Terenur	e, Dublin 6			Client: 0.00 Charges: 1,102.50	
Choose report	Da	te: 07 Aug 2015	✓ □ Transfe	er To Pay			Time (HH:MM): 7:21	
Bill Layout	Bill To:	Jack Flynn 4 The Mews				L		
Print Copy	Client	Rathfarnham						
	Our R		Your Ref:					
			v					
	Invoice Details F	Fee Earner Breakdown		Net	VAT Value	Fee Ea	arner	
Release	Type Marrai	uve		Net	VAT Value	ree ta	A	
Notify Release Inv								
Create FNL								
		R	kight-C	lick for (	Options			
Billing Guide								
							~	
Matter Ledger		y: 0.00 Miscellaneous Fees	0.00 VAT:	0.00			Bill Total: 0.00	
Requested By: Carol Nola	n Draft Number: (new	v)						
Message:		Input a messa	ge for	the acco	ount depar	tment	(optional)	
			.80.01		sant acpai		(operorial)	
<b>.</b>				ام ما ام .				
Гуре:		Invoice will be	e check	tea by d	erault. Sele	ect <b>Cre</b>	eait Note if red	quirea.
Open Invoice	e:	To create an o	ppen in	voice, c	heck the <b>O</b>	pen Ir	<b>voice</b> box.	
•			•			-		
Bill Sent:		Check when t	ha hill i	ic actual	ly cont			
JII Jeilt.				is actud	iy sellt.			
Matter:		This will show	the cu	irrent ca	ise by defa	ult; to	change, click	on the browse bu
		to bring up th	e matt	er list ar	nd select a	differe	ent case.	
			الاحققار				• h a au waa a t	
<b>Description</b> :			lit to th	he matte	er descripti	ion of	the current ca	ise but may be
		amended.						
Date:		The date will	default	to toda	v's date bu	ıt mav	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 <b>Client button</b> to revert to the client details.
Our Ref:	This will default to the Fee Earner's initials, but may be amended if required.
Your Ref:	Input a reference if applicable.
Write down time to:	Today's date will be shown by default. You may choose a different date.

- 4. The time and outlay to be included in the bill may be input using the **Billing Guide Wizard** or manually.
  - a. Using the **Bill Guide Wizard** 
    - i) Click on **Billing Guide** at the bottom left corner to start the Billing Guide Wizard.





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

The options for grouping time are:

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

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

The options for grouping outlay are similar:

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

		Soo Grabi	oit & Runne			
		VAT No:	8746675DD			
				D	ate:	07/08/2015
				-	voice No :	0
Jack Flynn				0	ur Ref:	FLY001/0002
4 The Mews Rathfarnham Dublin 6a						
Date	Billing Description		Time	Net Fees	VAT Amour @ 23	
Date						
DurRef	YourRef	of 16 The Haywain, Te	erenure, Dublin 6			·
DurRef FLY001/0002	Purchase	of 16 The Haywain, Te	erenure, Dublin 6 00 : 50	125.00	28.7	
DurRef FLY001/0002		e of 16 The Haywain, Te		125.00 75.00	28.7 17.2	/6
DurRef FLY001/0002 03/07/2015 03/07/2015	Purchase Demand & Draft Proceedings		00:50			76 25
DurR ef FL Y001/0002 03/07/2015 03/07/2015 03/07/2015 03/07/2015	Purchase Demand & Draft Proceedings Attendance Demand & Draft Proceedings Court Attendance		00:50 00:30	75.00	17.2	76 25 18
OurRef FLY001/0002 03/07/2015 03/07/2015 03/07/2015 03/07/2015	Purchase Demand & Draft Proceedings Attendance Demand & Draft Proceedings		00 : 50 00 : 30 03 : 01	75.00 452.50	17.2 104.0	75 25 18 10

Time to: Tuesd	ay 25 Octobe	r 2016 Out	ay to: Tuesday 25 October	2016	Draft No: 2	.75
* Action	* Type	* Matter	<sup>®</sup> Handler <sup>®</sup> Outlay	* Description	<sup>†</sup> Outstanding	* BillNow
🗋 Bill in Full	F	FLY001/0002	вн	Total Fees	1,900.00	1,900.00
(						,
1					Total Fees;	1,900.0

- 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.

				Matter: FLY001/0002 - Jack Flynn/Pur		
'ime to: Friday ems	31 July 2015	S Out	ay to: Monday 01	January 1900	Draft No:	287
Action	° Type	* Matter	<sup>6</sup> Handler <sup>6</sup> O	utlay <sup>©</sup> Description	* Outstanding	<sup>6</sup> BillNow
Bill in Full	F	FLY001/0002	CN	Demand & Draft Proceeding	gs 125.0	0 125.00
Bill in Full	F	FLY001/0002	CN	Demand & Draft Proceeding	s 452.5	0 452.50
Bill in Full	F	FLY001/0002	CN	Court Attendance	300.0	0 300.00
Bill in Full	F	FLY001/0002	CN	Attendance	75.0	0 75.00
Don't Bill	F	FLY001/0002	CN	Court Attendance	150.0	0.00
						•
					Total Fees: Total Outlay:	952.5
					Grand Total:	952.5
					Granu Iotai.	752.5
					Refresh Ok	Add to Invoice
Billing Gui	de Winned					
Back	ue mizaru					
- Fack				Matter: FLY001/0002 - Jack Flynn/Pun	cnase of 4 The Haywain, Ter	rrenure, Dubli
- Back			Total Fees			

- 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

Ungroup All Items Ungroup Selected Items Group all Fees and Outlays Group All Ees Group All Qutlay Group Outlay by Outlay Type Group Selected Narrative(s) Group Selected Items Bill Selected Items Bill All Items Do not bill Selected Items Do not bill Selected Items mon all Bills Exclude All Items from all Bills

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.

	tems							
1	<sup>‡</sup> Ac	tion	* Туре	* Matter	<sup>‡</sup> Handler <sup>‡</sup> Outla	ay <sup>+</sup> Description	<sup>‡</sup> Outstanding	<sup>‡</sup> BillNow
	🗋 Bill I	Bill in Full	-	^LE001/0001	BS	Total Fees	925.00	625.00
	🖹 Bill i	Don't Bill		LE001/0001	JP	Pd Registered Post - letter to La	ndlord 5.60	5.60
		Exclude from	m all bills					
		Drill throug	h 💦					

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

	ck					
				Matter: GLE001/0001 - Charlie Gleeson/Lease of	f South West Geor	ges Street
			g Group: Total Fees			
Items						
<sup>‡</sup> Action	🕈 Туре	* Matter	<sup>‡</sup> Handler <sup>‡</sup> Outlay	<sup>‡</sup> Description	* Outstanding	* BillNow
Bill in Full	F	GLE001/0001	BS	File Review re counsels fees and our fees	42.50	42.50
Bill in Full	F	GLE001/0001	BS	Letter to client re instructions and section	n 95.00	95.00
Bill in Full	F	GLE001/0001	BS	Letter to Noel Common SC	187.50	187.50
Bill Partially	F	GLE001/0001	BS	Attendance on client	600.00	300.00

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

## OR

Click the Add to Invoice button when you are ready to update the invoice. A message will ask whether you want to recalculate the *Fee Earner Breakdown* based on the changes to the Billing Guide. Click **Yes** to recalculate or **No** if you do not wish to recalculate.

).	Adding a Line	to the bill ma	nually			
(			Draft Invoice			
	V Ok	Message:				
		Request Type:	Invoice Open Invoice B	ill Sent	I	Invoice / Bill No: (not invoiced)
	Cancel	Matter Details				
		Matter:	Bills: 0.00			
		Fee Earner:	Carol Nolan Y			Outlay: 0.00
		Description:	Sale of House at:			Client: 0.00
		beschpaon	4 The Mews			Charges: 282.50
	Choose report		Rathfarnham Dublin 6			Time (HH:MM): 1:53
	Bill Layout	Date:	03 Jul 2015 Transfer	То Рау		
	Print Copy	Bill To:	Jack Flynn 4 The Mews Rathfarnham Dublin 6a			
		Our Ref:				
		Write down Time to:	03 Jul 2015			
	Release	Invoice Details Fee	Earner Breakdown			
	Notify Release Inv	Type Narrative		Net	VAT Value F	ee Earner
	Create FNL	F Documer	nt Drafting	150.00	34.50 C	Carol Nolan
		F Phone Ca		27.50		Carol Nolan
		F Advice or	n Contract	400.00	92.00	Carol Nolan

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

	Add or edit Bill Detail Line	×
Jack Flynn		
Sale of Hou:	e at: 4 The Mews, Rathfarnham, Dublin 6	
Fees	Outlays O Miscellaneous Outlays	
Fee Earner:	Carol Nolan	*
Nominal:	Fees Issued - Carol Nolan	¥
Narrative:	V 🕂 Add narrativ	e
Net:	0.00 VAT Code: U VAT Value: 0.00 Override VAT	
	Ok Cancel	
Line No: (ne	w)	al

- iv) Click **OK** to add to the invoice. Repeat the process for each additional line required.
- c. How to amend the Fee Earner Breakdown
  - i) Click the Fee Earner Breakdown Tab.

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

٠	Add a Bill Detail Line
	Clear Bill Detail Lines

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

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

Edit Breakdown by: Percentages O Values           Fee Earner         Percentage         Value           Carol Nolan         65.36797         867.76           Brian Sweeney         34.63203         459.74	Edit Edit	Fee Earner Breakdowr	ı	×
Carol Nolan         65.36797         867.76           Brian Sweeney         34.63203         459.74	Edit Breakdown by: O Percentages	O Values		
Brian Sweeney 34.63203 459.74	Fee Earner		Percentage	Value
	Carol Nolan		65.36797	867.76
Ok	Brian Sweeney		34.63203	459.74
		Ok Cancel		

- 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 doubleclicking.
- 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.



- 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

(1)			Keyhouse Case Management (CN - Carol Notan - 09:58 / 00:00)			Quick Search (Ctrl + (	a) – 🗆 ×
Home Case Reports	Phone Log Maintain Setup Help						
Add Edit Delete A/c Ledger Bil Requisitors	r						
Search/Open	Carol Nolan						
All Matters	Search						Draft Invoices 🔲
📜 My Matters	Matter Code	Bill Date	Addressee	Address	Туре	Total	Draft No.
🚯 Recent Matters	FLY001/0001	03 Jul 2015	Jack Flynn	4 The Mews Rathfarnham Dublin 6a	1	710.3	3 280 ^
Contacts							_
💐 Advanced Search							
() My Invoices	man		and a set of the set of the set	at an and the second and the second s		-	ma part and

### **Change the Billing Layout**

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

	Draft Invoice				□ ×
Ok Message:					
Cancel Request Type:	Invoice      Open Invoice      Bill Sent      In	voice / Bill No: (not	invoiced)		
Matter Detai	ils				
	Matter: FLY001/0001	Jack Flynn		Bills:	0.00
	Handler: Carol Nolan Y			Outlay:	0.00
Choose report Des	cription: Road Traffic Accident at Junction 9 on	M50		Client: Charges:	0.00
Bill Layout	Date: 18 Oct 2016 V 🗌 Transf	er To Pay		Time (HH:MM):	1:45
name ▶ Bill Layout	Jack Flynn 10 Rose Lawns				
Bill Layout Version 2	Blanchardstown				
	Our Ref: CN Your Ref:				
Write down					
Release Invoice Detai	ls Fee Earner Breakdown				
Notify Polooso Inv	Narrative	Net	VAT Value	Fee Earner	
Create FNL F T	Fotal Fees	525.00	120.75	Brenda Hartley	^
Billing Guide					
Matter Ledger Fees: 525.00 Requested By: Brenda Hartley Draft Number:	Outlay: 0.00 Miscellaneous Fees: 0.00 VAT:	120.75		Bill Total:	↓ 645.75

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.

169

Billin	ng Guide Report ×
En	ter Parameters
Matter code	FLY001/0001
To Date	10 Aug 2015
	Run

- 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.



FLY001/000	1	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	РНО	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
	Sur	nmary WIP Fee Earn			1 : 53				
		mmary WIP Fee Earn	<u>.</u>		1.55	Charge			
	Fee E		- Tim (Hrs:		1.55	Charge 282.50			
	Fee E	arner		min)	1.93				
	Fee E Carol	Earner Nolan		min) 53	1.93	282.50	UnBilled	Cut	nulative
	Fee E Carol	Totals billed Outlay		min) 53	1.93	282.50	UnBilled Outlay		nulative d Outlay

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

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

# The Time Report

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

Time Costing  My Day Book  Time Report	Enter Para	CN V
	Handler Code	CN ¥
My WIP by Bill Date My Top WIP Dashboard	From Date To Date Chargeable or NonChargeable Items	01 Jul 2015 13 31 Jul 2015 13 All ¥

**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.

				oit & Runne				
		Time Entry For FE	Betweel		Report		Data Date : 1008/2015 9:00 From Date: 01/07/2015 To Date: 31/07/2015	
Matter	Client	Matter Description	Hrs:min	Rate	Charge	Task	Comment	
	y Date : 03/07/2015			0.000				
Admin Tir	18		0:10 3:00	€0.00	€0.00 €0.00		Golf Tournament	
			3:00	€0.00	€0.00		Golf Tournament	
AIG001/0		Garry Barlow -v- Hired Talent	2:00			DIC : Dictation	Dictation	
BLA001/0	Group Gordon T. Black	Services RTA Walkinstown Crossroads, G. Black	0:30	€150.00	€75.00	ATT : Attendance	Attendance	
BL0001/0		Advice File	0:00	€0.00	€570.00		ob9byby;y	
BRE001/0	001 Mike Breeze	Broken left leg.	1:00	€150.00	€150.00	ADV : Advice	Talked with Mike re options for settlement	
			1:00	€150.00	€150.00	DIC : Dictation	Dictation to Doctor and	
			0:30	€150.00	€75.00	REV: File Review	Opposing Council Review Medical Report	
			1:00	€150.00	€150.00	INS : Instructions	Instructions received - Meeting	
			1:00	€150.00	6150 00	received COU: Court Attendance	with Client Court Attendance	
FLY001/0	01 Jack Flynn	Sale of House at: 4 The Mews,	0:11			PHO: Phone Call	Phone Call	
		Rathfamham, Dublin 6	1:00	€150.00		DRA: Document Drafting		
			0:10	€150.00 €150.00		PHO: Phone Call DRA: Document Drafting	Phone Call	
			0:02	€150.00	65.00	ATT: Attendance	Attendance	
FLY001/0	02 Jack Flynn	Purchase of 16 The Haywain, Terenure, Dublin 6	0:50	€150.00	€125.00	DEM : Demand & Draft	Demand & Draft Proceedings	
		Terenure, Dublin 6	1:00	€150.00	£150.00	Proceedings COU : Court Attendance	Court Attendance	
			0:30	€150.00	€75.00	ATT: Attendance	Attendance	
			3:01	€150.00	€452.50	DEM : Demand & Draft Proceedings	Demand & Draft Proceedings	
			2:00	€150.00	€300.00	COU : Court Attendance	Court Attendance	
	03/07/2015							
		Daily Time Daily Value	9					
	Daily Recorded Mins			Admin (Hrs):		33 : 11		
	Chargeable (Hrs): Non-Chargable (Hrs):	16:14 €3,005.00 0:00 €0.00		Unassigned (H Write Offs (Hrs		0:00		
	non-chargable (ms).		· · · ·	write Oils (his	ŀ-	0.00		
		€3,005.00						
		€3,005.00						

# 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

		WIP for Fee E	Data Date : 1	10/08/2015: 9:08			
	Started	Last Bill Date	Matter	Client Name	Description	Client A/C	WIP
CN		Carol N	olan				
	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			Business Time Limited	Lease of Unit 33, Eastgate Avenue, Dublin 12,	0.00	301.20
	03/07/2015		BRE001/0001		Broken left lea.	0.00	675.00
	29/09/2011			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		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			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
Decem	ber						
2000		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							
Janua							
	02/05/2012	31/01/2012	2 LOW001/0002	Lowery Developments	Receivership - Nama Properties No 2 Sandyford Estate	(925.00)	225.00
March							
	10/11/2011	06/03/2012	2 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

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.

DC	PDF	XLS					
•	Type the tex	t to find	-	5			
					Soo Grabbit & Runne		
				WIP for Fee E	arner by Last Bill Date	Data Date : 1	2/11/2014:21:14
	Started	Last Bill Date	Matter	Client Name	Description	Client A/C	WIP
CN		Carol N	olan				
	08/05/2004		ABB001/0001	George J Abbott	Sale 45 Somserset Road. Dublin 6	(345.000.00)	437.50
	31/01/2012			Abbey & Procter	Share Holding Agreement	0.00	300.00
	02/12/2005			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		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	9 QUI001/0005	Alan Quinn	Sale of 12 Main Street, Bray, Co. Wicklow	0.00	600.00
May							
	14/01/2011	30/05/2009	9 FIT001/0001	Scott Fitzpatrick	Estate of Joan Fitzpatrick	(480.75)	3.00
						Chargeable WIP Non-Chargeable WIP	2,358.70
						Report WIP Totals :	2.358.70
							n-Chargeable Time
							-

## **My Top WIP**

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

	To	op Work In Progre	ess By Fee Earner	Data Date : 10/0 F nargeable and nonc	ee Earner : CN
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		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		Lowery Developments	Receivership - Nama Properties - South County Dublin - Disputed	(1,000.00)	667.50
QUI001/0005		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
BE\$001/0001		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		Lowery Developments	Receivership - Nama Properties No 2 Sandyford Estate	(925.00)	225.00
LOW001/0004		Lowery Developments	Receivership - Nama Properties - No 81 Sandyford Business Park	(925.00)	192.00
LAW001/0001		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		Deirdre Talbot	Drunk Driving Arrest - 6th September 2009	0.00	42.50
SIM001/0001		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		David Abrahams	Family Law	(7,737.17)	4.00
FIT001/0001	06/06/2010	Scott Fitzpatrick	Estate of Joan Fitzpatrick	(480.75)	3.00

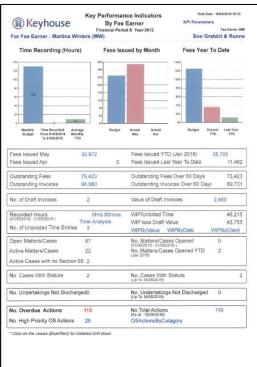
 The same options are available for printing, export and searching as in the case of the *Time Report* and *Billing Guide* report.

### **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.

BOU001/0001	Claire Bourke Personal Injury at work								Tel: 01 204 F/e: CN
ch									Standard Vie
Date	Comment	Time or Charge	Time	C/N-C	Charged	Billed Amount	Invoice No	Task	T/R
11 Mar 2010	General	Time	35	Chargeable	145.00	145.00	204	General Advice	Carol Nolan
17 Apr 2010	Telephone Attendance	Time	65	Chargeable	270.00	270.00	204	Telephone Attendance	Carol Nolan
18 Apr 2010	Research	Time	85	Chargeable	355.00	355.00	204	Research	Justin Phelan
22 Apr 2010	File Review - Letter to client	Time	100	Chargeable	417.50	417.50	204	File Review	Carol Nolan
22 Dec 2010	Billed Fees: 4900.50	Bill	0	Chargeable	(4,900.50)	0.00	204	BILLED	Carol Nolan
03 Feb 2012	Phone Call re issue with cou council	Time	16	Chargeable	81.00	0.00	0	Phone Call	Martina Winters
23 Aug 2011	File Review - next review stage 12 Sept			Chargeable		36.00		File Review	Martina Winters
08 Sep 2011	Charge for Letter	Time	7	Chargeable	36.00	0.00	0	CHG	Martina Winters
14 Sep 2011	Phone Call re outlays incurred	Time	21	Chargeable	105.00	0.00	0	Phone Call	Martina Winters
15 Sep 2011	Phone Call re medical report	Time		Chargeable		17.00		Phone Call	Martina Winters
29 Aug 2012	Phone Call re medical report	Time	31	Chargeable	130.00	0.00	0	Phone Call	Brian Sweeney

- 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.

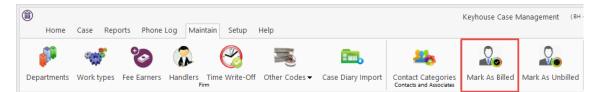
ice Number	×
204	
ок	

- 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

<b>(</b>	Mark Time As Billed By Client
Client Code	Select code
Invoice No	Enter the invoice number
Date	Please select date
	OK Cancel

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.

	Mark Time As Billed By Client 🗙
Client Code	DEM001
Invoice No	22
Date	28 Feb 2018
	OK Cancel

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

<b>(</b>	Unmark Time As Billed By Client	×
Client Code	DEM001	)
Invoice No	22	
	OK Cancel	)

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.

Home Case Reports	Phone Log Maintain Setup Help		Keyhouse Case Management (8H - Brinda Hurley - 0425 / 0135)	Quick Search (Ctrl + Q)	) - • ×
🚔 🍅 🏟	e Slip Start Blank Timer @Payment Receipt Accounts		Image: State with - Off         Image: State with - Off         Image: State with - Off         Create FNL         Curren FNL         Curren FNL		
Client/Case		iness Services Ltd ns Property Management plc			Tel: 01-66778 F/e: SK
Document Manager	Search				Standard View 👖
& Current Client Details Current Case Details	Date	Ref	Narrative	Billing A/c Outlay A/c Client C	ur 🔺 Deposit A/c
Extra Case Details Associates	> 30 Jun 2011		Pd Registered Post	5.50	
Oritical Information	03 Jul 2011 12 Jul 2011		Pd Brady & Co Search Fees Pd Commissioner for Oaths swearing affidavit of debt	57.50	
A/CLedger  A/CLedger  Time Ledger  Debt Ledger  Reserve Ledger  Undertakings	]				
Strong Room			and and an and a second a second		

**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.

Client Balance Report								
Enter Rep	Enter Report Criteria							
From Client Code (Blank for all)	~							
To Client Code (Blank for all)	~							
As At Date	04 May 2016 15							
Minimum Value (0 for All)	0							
Open or Closed Matters	Open 🗸							
Show Details	$\checkmark$							
	Run	Close						

5. A report will appear listing all matter balances for this client.

Type the text to find	5					
(Last Posting: 06/09/2012 )		tte	& Runne r List			
HAL002 Hire Banking Ltd			Billing A/c	Outlay A/c	Client Cur.	Client Dep.
0000 0000 Matter	GEN /	AD	0.00	0.00	0.00	0.00
0001 Debt Recovery - Jack Johnston	LIT I	MV	1,968.42	0.00	0.00	0.00
0002 Debt Recovery - Mary Ascond	DEB I	MV	4,650.96	0.00	0.00	0.00
Total Matters: 3 * = Billed	Total Balanc	ces:	6,619.38	0.00	0.00	0.00

#### 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.

١	Set Client A/C Reserve	×
Reserve		
6,000.00		
Comment for Ledger		
Reduced amount		
-		Ok Cancel

- 4. Input an amount and a comment.
- 5. Click **OK**; the reserve amount will then appear on the matter ledger.

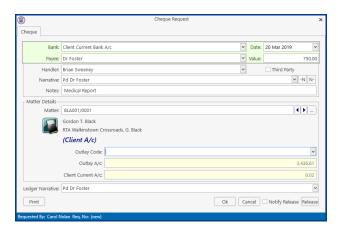
### How to add a comment

- 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.

	Add Comment	×
Date	15 Nov 2014	
Paying in I	Part Payments	
	Ok	el

#### 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 dropdown 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<br/>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.

Client

#### 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.
- 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.

٢			Draft Invoice					Ξ×
V Ok	Message:							
Cancel	Request Type:	Credit Note 💿 Invo	oice 🗌 Open	Invoice 🗌 Bill	Sent	Inv	oice / Bill No: (n	ot invoiced)
<b>~</b>	Matter Details -							
	Mat	tter: ABA001/0001	Image: A state of the state	David Abrahams			Bills:	590.40
	Hand	dler: Carol Nolan	~				Outlay:	0.00
	Descript	ion: Family Law						(7,737.17)
Choose report	D	ate: 04 May 2016	🖌 🗌 Transfe	r To Pay			Charges: Time (HH:MM):	278.50 1:37
Bill Layout	Bill To Clier	123 Mayfair Street					Time (HH:MM):	1:37
- Print Copy	Our	Ref: CN	Your Ref:					
	Write down Time	to: 04 May 2016	~					
	Invoice Details	Fee Earner Breakdown						
	Type Narra	ative		Net	VAT Value	Fee	Earner	
Release								^
Create FNL			Right-Cl	ick for Op	tions			
Matter Ledger								~
Matter Ledger	Fees: 0.00 Outla	ay: 0.00 Miscellaneous F	ees: 0.00 VAT:	0.00			Bill	Total: 0.00

- **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<br/>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.

🕂 🖊 🚺							
Add Edit Delete A/c Lec Bill Requisitions	dger						
Search/Open	Carol Nolan	~					
🔰 All Matters	Search						Draft Invoices
🐉 Recent Matters	Matter Code	Bill Date	Addressee	Address	Type	Total	Draft No.
My Contacts	GLE001/0001	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	0.00	26
🍳 Advanced Search	GOR001/0001	15 Nov 2014	Noreen Gorman	22 North Circular Road Dublin 2	I	178.67	26
💮 My Invoices	GRE002/0002	15 Nov 2014	Roger Greene	33 Main Street Cork	I	774.90	26
🖙 My Cheques	GLE001/0001	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	1,143.36	26
🌆 Phone Log	GLE001/0002	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	4,981.50	26
🕒 Strong Room	BLA001/0001	29 Oct 2014	Gordon T. Black	23 Ellis Park, Rathmines, Dublin 6.	I	0.00	26
🔞 Document Search							

#### 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.

٢			Draft Inv	voice			
🗸 Ok	Message:						
Cancel	Request Type	•	Invoice Open Invoice	Bill Sent		Invoice / Bill No: (n	ot invoice
	- Matter Detai	ils					
		Matter:	ABA001/0001	David Abrahams		Bills	590.4
		Handler:	Carol Nolan *			Outlay:	0.0
	Des	cription:	Family Law			Client:	(7,737.1
Choose report		Date:	04 May 2016 V Tr	ansfer To Pay		Charges:	278.5
-	B	ill To:	David Abrahams			Time (HH:MM):	1:5
Bill Layout 👻			123 Mayfair Street				
Print Copy		Client	Dublin 2				
		Our Ref:	CN Your	Ref:			
	Write down	Time to:	04 May 2016				
	Invoice Deta	ils Fee	Earner Breakdown				
	Type 1	Narrative		Net	VAT Value	Fee Earner	
Release	F F	Profession	nal Fee	500.0	0 115.00	Carol Nolan	
Melease		Search Fe		50.0		Carol Nolan	
	M	Photocop	ying of Brief	45.0	0 10.35	Carol Nolan	
💓 Create FNL							
821							
Billing Guide							

#### How to Delete a Draft Bill

1. Go to My Invoices as described above and select the invoice which is to be deleted.

Choose report

Bill Layout

J

Ok Cancel

Print Copy

Approve

Release Notify Release Inv

Create FNL

Billing Guide

Matter Ledger

۷

- 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

- Go to **My Invoices click** on the bill you want to Print; the draft bill will appear. 1.
- 2. Click on the Print Copy button.

3. Click on **Print** located on the report toolbar to print the draft bill.

iew Report					
DOC DOC	DF XLS				
🔁 🛄   Тур	e the text to find 🔹 📑 🚰				
int		INVOICE			
		DRAFT			
	Charlie Gleeson			15 Nov 2014	
	South West Georges Street Dublin 2				
	Account Ref: GLE001/0001		Our Ref:	ЛР	
	Invoice No: 0		Your Ref:		
	Lease of South West Georges Street		Not Liable	Liable	
			to VAT €	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		
					$\searrow$
	E&OE	SUBTOTALS	5.60	925.00	
	92	25.00 @ 23.00 % VAT		212.76	
	Add tot	al not subject to VAT		5.60	
		INVOICE TOTAL:		1,143.36	
		INVOICE IOTAL:		1,143.30	

## **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.

	C	heque Request					×
			~	EFT	Date:	24 Aug 2016	~
				~	Value:		0.00
Brian Sweeney				~		Third Party	
							~
ABB002/0003						•	• •
Abbie Lynch							
Power Of Attorney							
Once Off Payment							
Outlay Code:							~
Outlay A/c:							0.00
Client Current A/c:							0.00
							•
			Ok	Car		Notify Release	Release
	ABB002/0003 Abbie Lynch Power Of Attorney Once Off Payment Outlay Code: Outlay A/c	Brian Sweeney Brian Sweeney ABB002/0003 Abbic Lynch Power Off Payment Outlay Code: Outlay A/ci	Brian Sweeney  Brian Sweeney  ABB002/0003  Abbie Lynch Power Off Payment  Outlay Code:  Outlay A/ce	Brian Sweeney       A88002/0003       Abbie Lynch       Power Of Altorney       Outlay Code:       Outlay A/c:       Client Current A/c:	Srian Sweeney  Srian Sweeney  Srian Sweeney  ABB002/0003 Abbie Lynch Power Of Attorney  Outlay Code: Outlay Code: Outlay Code: Outlay A/cc Client Current A/cc	Brian Sweeney     v       Brian Sweeney     v       A88002/0003     A8bio Lynch       Power Of Altorney     v       Once Off Payment     Outlay A/c       Outlay A/c     v       Client Current A/c     v	

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:	<b>Input</b> 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 <b>double-click</b> the required case.
Notify Release: Ledger Narrative:	Check this box if you want an email to be sent to the Accounts Department when the cheque has been released. 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.

Home Case Report	s Phone Log Maintai	n Setup Help				(	
🕂 🦯 🗶 🔛							
Add Edit Delete A/c Ledg Cheque Requisitions	jer						
🔍 Search/Open	Carol Nolan	~					
🥡 All Matters	Search						Standard \
🎼 Recent Matters	Requested On	Requested By	Bank	Narrative	Value	Payee	Fee Earner
My Contacts	15 Nov 2014	Carol Nolan	PCASH	Pd O2 Communionations	50.0	0 O2 Communionations	Carol Nolan
💐 Advanced Search	29 Oct 2014	Carol Nolan	CLIENT	Pd Brady & Co	1,000.0	) Brady & Co	Carol Nolan
💮 My Invoices							
🗇 My Cheques							
🜆 Phone Log							
🕒 Strong Room							
🔞 Document Search							
👘 Template Library							

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.



se: BLA001/0001	Gordon T. Black RTA Walkinstown Crossroi	ids, G. Black				Tel: 01 4766 F/e: BS
earch						
Date	Ref	✓ Narrative	Billing A/c		Client	Deposit A/e
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			
9 Jun 2010	5887	Pd Mr Gordon T Black settlement less fees as agreed			12,548.00	
0 Oct 2011	509818	Pd cLIENT			2,036.72	
30 Jul 2010	500178	Pd Gordon T Black balance due to client			375.30	
4 Apr 2010	2390	Pd Dr Simon Young Medical Report		250.00		
5 Mar 2010	2266	Pd PIAB		50.00		
2 May 2011	218	Invoice: Fees:635 Outlay:379 VAT:133.35	1,147.35			
2 May 2011	218	To Invoice 218		(55.00)		
2 May 2011	218	To Invoice 218		(250.00)		
2 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)	
0 Jun 2010	1654	Lodged on a/c fees & vat			(1,210.00)	
0 Oct 2011	123456	Lodged part payment on a/c	(1,000.00)			
6 Oct 2011	1234545	Bill from Airtricity		106.61		
7 Aug 2015		FNL: 500.00 Gordon T. Bl Fees: 500.00 Outlay: 0.00 Vat: 0.00			1	

### **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.

î)			Keyhouse	Case Management (BH - Brenda Hartley -	0.00 / 00.00 )	Quick Search (	Ctrl + Q) – 🗆 🗙
Home Case Reports	s Phone Log Maintain Set	up Help					
	Draft Invoice Request Cheque Payment Receipt Commen	t Set Client Reserve Client Balances De A/c Ledger	btors Ledger	Create FNL Current FNL Details			
Client/Case 🛙 Case Diary	Case: FLY001/0001	Jack Flynn Road Traffic Accident at	Junction 9 on M50				Tel: 01-564 78 F/e: CN
Case Diary Document Manager	Search						Standard View
here the transmission of trans	Date	Ref	Narrative		Bil	lling A/c Outlay A/c	Client Cur 🔺 Deposit A/c

- 2. The following dialog box appears. The bank has been prepopulated with a default setting. This can be changed.
- 3. Enter the details

	)	Payment Receipt			×	:
R	leceipt					
	Bank:	Office Bank A/c	Date:	05 Mar 2018	¥	
	Ref:	5987	Value:		1,000.00	
	Fee Earner:	Carol Nolan			~	
	Narrative:	Payment Received			*	
	Matter Details					
	Matter:	FLY001/0001				
		Jack Flynn				
		Road Traffic Accident at Junction 9 on M50				
	Print			Ok	Cancel	

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.

Case: FLY001/0	0001	• •	Jack Flynn Sale of 10 Rose Lawn, Blanci	ardstown Dubli	in 17											: 01-569 7412 : CN
Original Debt A	Amount	0.00	Sale of to Rose Lawit, Blance	lai ustown, Dubii								Total Colle	ected To-date	0.00		Post Payment
interest To-dat	te	0.00	Post Interest													
Recoverable C	ost To-date	0.00	Post Costs									Outstand	ling	0.00		
Start Date 12	2 Feb 2016		Record No						(	Comments:						
Your ref			Matter Status													
User3			Charge Arrangement NIL													
Matter Code	le	Date	Description	Method	Туре	Payment	Principal Paid	Interest Paid	Cost Paid	Interest Due	Cost Due	Remitted	Held Date	Posting Ref	Reference	
																^

- 3. Input the Original Debt amount.
- 4. Click the check mark we beside the amount to confirm.

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

## How to Post a Payment

1. Click on **Debt Ledger** on the **Case Diary** navigation panel.

## 2. Click Post Payment.

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

3. Input the following information on the **Post Payment** dialog box

				Post p	ayment		×
Payment	Proper	ties	Allocation				
Matter Co	de	IBSO	01/0001				
Date		04 N	/lay 2016	~	Transaction Date	04 May 2016	~
Reference		142	5				
Туре		Dire	ct Payment	~			
Payment I	Method	Che	que	~			
Value		305.	00				
Principal F	Paid	250.	00		Principal Status	Part Payment	*
Costs Paic	ł	50.0	0		Costs Status	Part Payment	~
Interest Pa	aid	5.00			Interest Status	Part Payment	~
Descriptio	n Paid	3 of	5 payments				
						<u>S</u> ave <u>C</u> a	ancel

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

		Post pay	ment		×
Payment Pro	perties Allo	cation			
Entry Date	13 Jun 2016		~		
Enter By	CN				
Posting Ref	45				
Remitted					
Date Remitted	Please select	date	~		
Held Date	Please select	date	¥		
				Save	Cancel
itry Dat	e:	The <b>date</b>	e will defa	Save ult to tod	,,
try Dat ter By:	e:				lay's da

**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**.

	Post Interest 2
Calculate Interest Base	ed On The Following
Mc	ionthly 🗸
Rate at 5.0	00%
From 01	I Jan 2016 🗸 To 31 Mar 2016 🗸
On 17	700.00
Description 1st	it Quarter
Calculate Interest 25	55.00
	Save Cancel

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**.

<b>(</b>	P	ost Costs		×
Matter Code	IBS001/0001			
Date	04 May 2016	Charge Cos	st To Client	
Costs	100.00	Client Charge	50.00	
Description	Fees			
				-
			Save Cancel	

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.

	Debt Costing	J Ledger			×				
	Enter Paran								
Matter	IBS001/0001	L							
			Run		Close				
ener (gener (gen					View Report				
		Matter Original De Recoverabl		18:5001.0 50,000	Costing Le tot internation 100 Detx Internation 100 Collected Cutstand	est to Date		es La	2,652.07 5,500.04 47,112.01
		Date 26/06/2008 26/06/2008 26/06/2008 26/06/2008	Coets Interest Recept	Value 0.00 0.00 0.00 00 0.00 00	Premium Pard 0.00 0.00 0.00 0.00 0.00 0.00	Costs 60.00 0.00 0.00 0.00	0.00	interest 0.00 2,062.05 0.00 0.00	interest Part 6.00 6.00 6.00 6.00

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

# **Chapter 15: The Reserve Ledger**

The reserve ledger is used in 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.

Client/Case	Case: 185001/0020		< ▶ Ir	terim Busine:	s Services Lt	4											Tel: 01-6
ase Diary			G	ary Neville -	Short term lo	an											F/e: BS
ocument Manager																Add	Edit
urrent Client Details urrent Case Details ther Case Details	Date	General Damages	Special Damages	Future Specials	Property Damage	Other Damages	Contributory Negligence	Co Defendant Liability	Costs	General Comment	Special Comment	Future Comment	Property Comment	Other Comment	Contributory Comment	CoDefendant Comment	Costs Comme
ociates	08 Aug 2013	40,000.00	30,000.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000	test							
cal Information	08 Aug 2013	50,000.00	30,000.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000								
	08 Aug 2013	50,000.00	0.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000								
edger Ledger Ledger																	
serve Ledger																	
dertakings																	

### 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.

<b>()</b>	Reserve Le	dger – Insert X
Matter IBS001/0020	Interim Business Services Ltd	Date 10 Aug 2015
General Damage	40,000.00	test
Special Damages	30,000.00	Enter special damage comments
Future Specials	0.00	Enter future specials comments
Property Damage	20,000.00	Enter property damage comments
Other Damage	0.00	Enter other damage comments
Damages Total	90,000.00	
Contributory Negligence	20,000.00	Enter contributory negligence comments
Co Defendant Liability	0.00	Enter co defendant liability comments
Reserve Total	70,000.00	
Costs	10,000.00	Enter costs comments
Estimate Total	80,000.00	
		<u>O</u> K <u>Cancel</u>

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.

Confirm Delete	
	Are you sure, you want to delete?

# 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.

0					Keyhouse C	Case Management (CN - Carol Nolan - 09:06 / 00:00)	(Cuick Search (Ctrl + Q) -
Home Case Reports	Phone	Log Maintain Set	up Help				
hone Log Add Add to C	ase Edi	t Delete					
Search/Open	Search						Standard View
All Matters		Case Code	Date	Name	Who	Message	Description
	14	TJF001/0001	06 Jul 2015	TJ Fox	AM	Caller: PTSB - Branch Manager Branch Manager called to say a payment was recei-	Outstanding debt to PTSB Bank.
My Matters	1	TJF001/0001	06 Jul 2015	TJ Fox	CN	Spoke with solicitors for the Building Society to try and arrange a payment plan. T.,	Outstanding debt to PTSB Bank.
Recent Matters	1	BRE001/0001	03 Jul 2015	Mike Breeze	CN	Caller: Mike Breeze Wants to discuss settlement options with Defendent. Wants to	Broken left leg.
Contacts	1	FLY001/0002	03 Jul 2015	Jack Flynn	CN	Caller: James Bay Draft Contracts are ready for review.	Purchase of 16 The Haywain, Terenure, Dublin 6
Associates		SIM001/0001	02 Jul 2015	Bart Simpson	CN	Called client to remind him to send back the papers	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6
Advanced Search	1	FLY001/0001	02 Jul 2015	Jack Flynn	CN	Called client to remind him to send back the papers	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6
My Invoices		BES001/0002	03 Feb 2015	Business Time Limited	BS	Phone Call	Shareholding Agreement
My Cheques	1	BE5001/0001	03 Dec 2014	Business Time Limited	BS	Phone Call to Harold Worth	Lease of Unit 33, Eastgate Avenue, Dublin 12.
Phone Log	1	NOL001/0001	04 Sep 2014	Paula Nolan	CN	test test	Paula Nolan V Joe Smith
Firm Undertakings	1	A88001/0001	08 Aug 2014	George J Abbott	MK	Telcon with etc etc	Sale 45 Somserset Road, Dublin 6
Strong Room	1	AIG001/0004	29 May 2014	Allied Investment Group	BS	Sean enquired about third party cover. I informed him that the customer had com	Mark Twain -v- Hoover Services
Q Document Search	1	AIG001/0003	29 May 2014	Allied Investment Group	BS	Frank phoned Claims team to follow up on file details	Zara Kennedy -v- Carl Indigo
🎙 Template Library	1	AIG001/0002	27 May 2014	Allied Investment Group	BS	Alan phoned regarding uncompleted claims form	Garry Barlow -v- Hired Talent Services
	1	BEC001/0006	20 May 2014	Angela Beck	BS	Phone lender for redemption statement - Any note	14 Windy Arbour, Surbiton, Surrey SU1 2WW
	1	DUG001/0001	19 May 2014	Paul Duggan	BS	Phone buyers' solicitors, check buyers' full names	21 Clonard Village, Chiswick, London W5 8NN
	1	BLO002/0001	19 May 2014	David Bloggs	BS	Phone lender for redemption statement	6 Hill Street, Cork, Surrey ST56 6Y
	1	DUG001/0001	09 May 2014	Paul Duggan	BS	Phone buyers' solicitors, check buyers' full names	21 Clonard Village, Chiswick, London W5 8NN
	1	DUG001/0001	07 May 2014	Paul Duggan	BS	Phone lender for redemption statement	21 Clonard Village, Chiswick, London W5 8NN
	1	AIG001/0001	29 Apr 2014	Allied Investment Group	BS	Phone Call to discuss potential damages and costs.	Noel Brown -v- Jones Services Ltd
	1	ABB002/0001	27 Mar 2014	Abbie Lynch	BS	Type in here any conversation details Call from: Abbie Lynch Phone No: +353-87-8	Commercial Lease - 5 Main Street Donmbrook

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

 $\checkmark$  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.



**(3**)

## How to add a phone message

- 1. **Open** the phone log.
- 2. Click **Add** on the Phone Log tab.

	Add Phone Log – X
Case	ZZZZZZ/ZZZZ Mon Assigned Phone Message
Date	10 Aug 2015 V Time 11:49
Priority	⊖ High      ● Normal      ○ Low
Who	Select who
Notify	Select handlers to notify
Caller	Enter the caller Answered
Message	
	Send Email Qk Cancel

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:	<b>Check</b> this box only when the message has been answered; when it is checked, the message will not appear in the addressee's task list.

- 3. Click **OK**. The message will appear in the selected person's task list.
- 4. To send an email click **Send Email**.

### How to edit a phone message

- 1. In the phone log, select the message you want to amend.
- 2. Click Edit on the Phone Log tab.

	Change Phone Log (1880) X
Case	KEL002/0002 Sarah Kelly Debt Collection
Date	21 May 2014 💙 14:41
Priority	○ High
Who	Carol Nolan
Notify	Please Select Group
Caller	Louise Answered
Message	
Caller: Lou - <u>Pls</u> call t	urgent
	I
	Send Email Ok Cancel

- 3. Amend as required.
- 4. Click **OK** to save the changes.

## How to delete a phone message

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

**NOTE:** If you delete a message it will be removed from the system completely.

# **Chapter 17: Closed Cases**

## How to Search for Closed Cases

- 1. Click on Search/Open on the Navigation panel.
- 2. Select All Matters on the Navigation panel.
- 3. Click the **View** icon on the right of the window. The Standard View is shown by default.
- 4. Select the required View
  - **Closed Cases** to search only closed cases
  - **Open Cases** to search only open cases.
  - Open and Closed Cases to search both lists.
- 5. Input a search term in the search box; the search will update as you type.

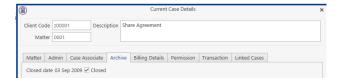
#### How to view the Archived Diary & Ledger of a closed case

- 1. Search for the closed case as described above.
- 2. Double click the required case to view the Case Diary.
- 3. Click on A/C Ledger on the Navigation panel to view the archived ledger.

Note no amendments can be made in the Case Diary unless the case is reopened.

#### How to reopen a closed case

- 1. Search for the closed case as described above.
- 2. Double click to open in the Case Diary.
- 3. Click on **Current Case Details** on the Navigation panel, to see the Current Case Details screen.
- 4. Select the Archive Tab in Current Case Details.



5. Uncheck the box marked **Closed**. The case is now reopened.

	Closed Cases
View	
Open Cases	
Closed Cases	
Open and Closed Cases	

#### 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.

			Cu	urrent	Case Details					×
	Matter 0001 Description * Road Traffic Accident at Junction 9 on M50									
Matter Admin	Additional Detail	s Associates	Arc	hive	Billing Deta	ails	Permission	Transaction	Linked Case	5
Fee Earner *	Carol Nolan		~	File F	Ref	Brie	ef Builder Ca	5e		
Secretary	Anne Mellon		*	Othe	er Party	Ent	ter Other Parl	ty		
Partner *	Brian Sweeney		*	REF	3	Ent	ter User3			
Department *	Litigation		*	Clier	nt Ref	Ent	ter Client Ref			
Work Type *	Accident		*				Aark as Impor	tant	✓ St	atement
Old Reference	Enter old reference			Branch Select branch				~		
	No Win No Fee									
Case Plan &	Status									
Case Plan/Ty	pe General Office V	Vork		*	File Colour	Sele	ct file colour			ear
Case Status	Draft proceedin	gs		*	Record No	1123	33			
File No 362								(	ок	Cancel

- 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.

			Current Cas	e Details				×
Client Code Matter	FLY001	Description	Purchase of 1	6 The Haywain, T	erenure, Dubl	in 6		
Matter Admin	Additional Details	Case Associat	e Archive	Billing Details	Permission	Linked Cases		
Date File Closed Location Archive Location			~					
File Barcode No Box Barcode No								
Expected Destroy			~					
Actual Destroy Da	Select fee		~					
File Number:362							<u>o</u> k	<u>C</u> ancel

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.

About to close this case						
	There is Time outstanding on this case There are Charges outstanding on this case Are you sure you want to close this case at this time? Close the case Cancel					

# **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 <a href="support@keyhouse.assist.com">support@keyhouse.assist.com</a>

## 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.

Home Case	Keyhouse Case Management (Hr-BenderWeily-Bild) (001)								Quick Search (Ctrl + Q)		
iew Item • Print	Export to PDF	Start Timer New	Time Slip Start Blank Timer	sify Email Capture Up Document(s)		le Brief ref Por Viewer	MS Word Worksha				
Client/Case		BLO003/0001	Jack Flynn Road Traffic Accident at	Juntion on M50							Tel: F/e:
Document Manager Current Client Details Current Case Details	<b>S</b> 50	eference: arch Folder: All	0								New View 🖷
Extra Case Details Associates Critical Information	Folds	9 🗾	Document Name Blank Letter	Diary Date 👻	Track Referen Ver: 479793	ion Document C		From	То	Subject Miscellaneous Letters	
Know Your Client		6	Letter to Solicitor re Pleadings Letter to Counsel re Pleadings	20 Dec 2019 20 Dec 2019	479792 479791	3 Letter 3 Corresponde	Case nce Case			Letter to Solicitor re Pleadings Letter to Counsel re Pleadings	
A/c Ledger Time Ledger		68	Draft Pleadings from Counsel	21 Oct 2019	473506	1 Client letters	Case			Draft Pleadings from Counsel	
Debt Ledger Reserve Ledger		6	Report from Dr Philpott Personal Injury Summons	21 Oct 2019 21 Oct 2019	473505 473504	1 Client letters 1 Pleadings	Case			Report from Dr Philpott Personal Injury Summons	
Undertakings		6 6	Grounding Affidavit Affidavit of Verification	18 Sep 2019 18 Sep 2019	472663 472780	1 Pleadings 1 Pleadings	Case			Test Test Test Test	
ou ong robin		6	Medical Report from Dr Philpott Medical Report from Mr Jones	18 Sep 2019 18 Sep 2019	472817 467614	1 Report	Case			Test Test Medical Report from Mr Jones	

- 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.

New Brid	ef Wizard				×
<b>Meyhouse</b>				Brief Assen Wizard	nbly
Using a Brief Template					
Brief Template	Туре	Sequence	Section		
Booklet of Medical Reports					
Booklet of Pleadings					
Do not use a Brief Template					
Cancel				Previous	Next

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.

 $rac{W}{}$  **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.

	New Brief Wizard		×
	Keyhouse	Brief Assembly Wizard	
Brief Info	rmation		
Title:	Personal Injury Claim		
Author:	Carol Nolan		
	Jack Flynn vs John Jones		
Location:	\\TRAININGPC2\KeyhouseTraining\Keyhouse\keyhouse\client documents\FLY001\0001		
Created:	13 Dec 2019 15		
Published:	13 Dec 2019 15		
Cancel		Previous Next	

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.

	New Brief Wizard	x
	Keyhouse	Brief Assembly Wizard
Read	y to create Brief	
	Action	
<ul> <li>Image: A second s</li></ul>	Do NOT copy the most recent Brief for this Case	
<ul> <li>Image: A second s</li></ul>	Do NOT use a Brief Template	
<ul> <li>Image: A second s</li></ul>	Do NOT copy any Case Documents into this brief	
<ul> <li>Image: A second s</li></ul>	Brief Title: Brief for AnotherMatterForEvabloggs	
	Brief Author: Brenda Hartley	
Ca	ncel	Previous Finish

10. When you are satisfied, click **Finish**.

11. The sections in the brief will be displayed if Options 2 or 3 were selected.

Home Case Reports	Keyhouse Case Management (BH - Brende Henriey - 6640 / 0550) Phone Log Maintain Setup Help	
	DP DF Viewer       Image: Constraint of the second se	
olient/Case Client/Case	Case: BL0003/0001 J Jack Flynn Road Traffic Accident at Juntion on M50	
Document Manager Current Client Details Current Case Details	Old Reference. Brief: Brief for Road Traffic Accident at Juntion on M50 Section	4
Extra Case Details Associates	Cover Letters	-
<ol> <li>Critical Information</li> <li>Know Your Client</li> </ol>	Interparty Correspondence     Pleadings	
A/c Ledger Time Ledger Debt Ledger	Report     Documents Not Included in this Brief	
Reserve Ledger	Search	
Strong Room		^
	Section: 002 - Pleadings (3 documents)     Section: 003 - Report (2 documents)	

## A generic section will appear if Option 1 is selected.

Home Case Reports	Phone Log Maintain Setup Help	Keyh	ouse Case Management (BH - Brenda Hartley - 05:53 / 01:37	)
Start Timer New Time Slip Start B	PDF Viewer keyhouse → Show Preview Piewiew Brief Sections Beief Preview	New Brief     Re-order Brief     Open Brief     Verify Documents (Re)generat	€ Open TOC € Open PDF e ≩ Finalise Drag and Drop	
Client/Case Case Diary	Roa	k Flynn ad Traffic Accident at Juntion on M50		
Document Manager Scurrent Client Details	Old Reference: Brief: Brief for Road Traffic Accident at Juntion c	n M50		
Surrent Case Details			Section	4
Extra Case Details Associates	🧭 Cover Letters			
Critical Information	Documents Not Included in this Brief			
where the second	Search 😵			
<ul> <li>A/c Ledger</li> <li>Time Ledger</li> <li>Debt Ledger</li> <li>Reserve Ledger</li> <li>Undertakings</li> </ul>	Type Document Name		Class	Document Date Action Priority Action Type
	Section: 999 - Documents Not Included	in this Brief (118 documents)		^

## **Brief Home tab**

## **Brief Home Tab**

#### The Home tab in the Brief:

Home Case Reports Phone Log	Maintain Setup Help
	DF Viewer                Add
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 existi 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.

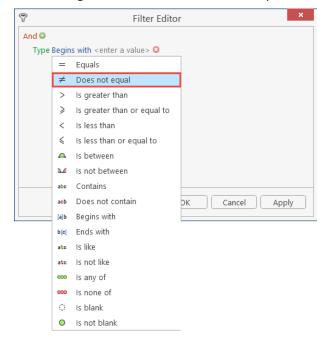
1. Click on the Arrow to the left of the Section number.

Case: BLA001/0001 Gordon T. Black RTA Walkinstown Crossroads, G. Black						
Brief: Brief - Test Save Grid						
	Section					4
🧭 Cover Letters						
Documents Not Included in this Brief						
Search				Sta	ndard View 📒	
Type Document Name <sup>9</sup>		Class	Document	Action Pri	Action Type	
Section: 999 - Documents Not Included in this Brief (52 documents)					•	^

2. Right click on Type on the Header Row and select Filter Editor

Image: Second Fig       E-mail Fig       Clear Sorting       pusedemo.ie: Draft Civil Bill         Image: Second Fig       Group By This Column       Group By This Column         Image: Second Fig       Show Group Panel         Image: Letter to       Show Column Chooser         Image: Second Fig       Best Fit         Image: Second Fig       Best Fit         Image: Second Fig       Best Fit	•	Type ▲ Sect	Docume ion: 999	2+	Sort Ascending	his Brief (52 documents)
Filter Editor			Civil Bill Financia Initial Le Letter to		Clear Sorting Group By This Column Show Group Panel Show Column Chooser Best Fit Best Fit (all columns)	ousedemo.ie: Draft Civil Bill

3. Click on Begins with and select Does not equals



4. Click on Enter a value and type Image

♥ Filter Editor ×	♥ Filter Editor ×
iand Type Does not equal <u><enter a="" value=""></enter></u> G	And Contract And C
OK Cancel Apply	OK Cancel Apply

- 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.**.)

earch			N	lo Images
Type <sup>9</sup> Document Name	Class	Document A	Action P	Action T
∡ Section: 999 - Documents Not Included in this Brief (52 documents)				
💋 E-mail FROM Brian Sweeneybrian@keyhousedemo.ie: Draft Civil Bill	General	10 Nov 2010	Normal	Email
Eivil Bill (CC) RTA_132	Pleadings	10 Nov 2010	Normal	Email
😥 Financial Statement	Reports	13 Jan 2011	Normal	Scanned.
🔞 Initial Letter RTA 1 Def	Letters/Int	19 Oct 2011	Normal	Action
😰 Letter to client	Letters/Int	19 Oct 2011	Normal	Action
Authority Forms	Reports	19 Oct 2011	Normal	Action
E Letter to Doctor	Letters/Int	19 Oct 2011	Normal	Action
📧 Letter to Garda	Correspo	19 Oct 2011	Normal	Action
😰 Chase letter to Garda	Correspo	19 Oct 2011	Normal	Action
📧 Chase 1st Defendant	Letters/Int	19 Oct 2011	Normal	Action
🕫 Chase Ltr for Doctor 1Report	Letters/Int	19 Oct 2011	Normal	Action
🔞 Chase Letter for Garda Report	Correspo	19 Oct 2011	Normal	Action
😢 Ltr to client to call to sign	Letters/Int	19 Oct 2011	Normal	Action

**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

Case: FLY001/0001	Jack Flynn Road Traffic Accident at Junction 9 on M50				Tel: 01-564 78 F/e: CN			
Brief: Brief for Road Traffic A	cident at Junction 9 on M50				Brief Sectio			
Search Standard								
Type Document Name		lass	Document	Action Prio	Action Type			
A Section: 001 - Client I	etters (2 documents)							
Letter to Barack	bama re defence	Client Letters	06 Jul 2017	Normal	Action			
🔯 Letter to M Obar	a re reply from barrister	Client Letters	06 Jul 2017	Normal	Action			
A Section: 002 - Corresp	ondance (11 documents)							
Letter to Barriste	requesting Opinion	Correspon	06 Jul 2017	Normal	Action			
Letter to Barriste	encl Medical Report	Correspon	06 Jul 2017	Normal	Action			
Letter to Garda C	mbudsman	Correspon	31 May 20	Normal	Action			
Email from Chief	State Solicitor	Correspon	31 May 20	Normal	Action			
Email to Chief Sta	te Solicitor	Correspon	31 May 20	Normal	Action			
Letter from an G	rda Siochana	Correspon	31 May 20	Normal	Action			
Letter from Chief	State Solicitor	Correspon	31 May 20	Normal	Action			
Letter from Gard	Ombudsman	Correspon	31 May 20	Normal	Action			
Letter to Chief St	te Solr	Correspon	31 May 20	Normal	Action			
E Letter to Garda C	ommissioner	Correspon	31 May 20	Normal	Action			
Trump to Chief S	ate Solr	Correspon	31 May 20	Normal	Action			
Section: 003 - Court E	ocuments (6 documents)							

ase: FLY00	1/0001 Jack Flynn Road Traffic Accident at Junction 9 on M50				Tel: 01-564 7 F/e: CN
rief: Brief f	or Road Traffic Accident at Junction 9 on M50				Brief Section
earch					Standard View
Туре	Document Name	Class	Document Date	Action Priority	Action Type
⊿ Secti	on: 001 - Client Letters (2 documents)				
1	Letter to Barack Obama re defence	Client Letters	06 Jul 2017	Normal	Action
12	Letter to M Obama re reply from barrister	Client Letters	06 Jul 2017	Normal	Action
∡ Secti	on: 002 - Correspondance (11 documents)				
1	Letter to Barrister requesting Opinion	Correspondance	06 Jul 2017	Normal	Action
	Letter to Barrister encl Medical Report	Correspondance	06 Jul 2017	Normal	Action
1	Letter to Garda Ombudsman	Correspondance	31 May 2017	Normal	Action
12	Email from Chief State Solicitor	Correspondance	31 May 2017	Normal	Action
1	Email to Chief State Solicitor	Correspondance	31 May 2017	Normal	Action
12	Letter from an Garda Siochana	Correspondance	31 May 2017	Normal	Action
1	Letter from Chief State Solicitor	Correspondance	31 May 2017	Normal	Action
1	Letter from Garda Ombudsman	Correspondance	31 May 2017	Normal	Action
12	Letter to Chief State Solr	Correspondance	31 May 2017	Normal	Action
	Letter to Garda Commissioner	Correspondance	31 May 2017	Normal	Action
1	Trump to Chief State Solr	Correspondance	31 May 2017	Normal	Action
Section	on: 003 - Court Documents (6 documents)				
> Secti	on: 004 - Email Message (3 documents)				
> Secti	on: 005 - Form Document (2 documents)				

#### 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

1	Case:	BEE001/0008		Zaphod Beeblebrox				
				Beeblebrox v Dublir	n Bus			
							$\sim$	
B	rief: Bri	ef for Beeblebrox	v Dublin Bu	S			Brief Sectio	ons
	Search						$\sim$	
	Search							
	Туре	Document Nar	me			Class	Document	
	► S	ection: 001 - Clien	nt Letters					^
	► S	ection: 002 - Docu	uments					
	► S	ection: 003 - Enga	igement Let	ters				-
	) ► S	ection: 004 - Instr	uction Shee	ts				
	► S	ection: 005 - Lette	ers/Interpar	ty Correspondance				-
	► S	ection: 006 - Mem	10					-
	► S	ection: 007 - Moti	ion papers					

2. A list of sections will be expanded.

Case:	FLY001/0001	Jack Flynn Road Traffic Accident at Junction 9 on M50	Tel: 01-564 7894 F/e: CN
Brief:	Road Traffic Accident at Junction 9 on	M50	Brief Sections
	Cover Letters		Pin to fix 増
	Client Letters		
	Correspondence		
	Letters/Interparte Correspondence		
	Medical Reports		
	Pleadings		
	Documents Not Included in this Brief		



- 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

- 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 Delete on the Home tab. Alternatively, right-click the Section and choose Delete Section from the pop-up menu.
- 4. A message will ask you to confirm the deletion.
- 5. Click Yes.

## How to change the order of Sections

- 1. Click Brief Sections on the right of the brief screen (see How to amend a Section Name, p. 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.

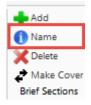
Move the selected section **up one position**.

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)



Delete Brief Sect	ion?
$\bigcirc$	Are you sure you want to delete Section "Cover Sheet"?
	Yes No

2. Pin the Brief Sections so that they remain visible.

	Section	щ
P	Cover Letters	
	Client Letters	
Ú.	Documents	
L)	Engagement Letters	
	Instruction Sheets	
Ú.	Letters/Interparty Correspondance	
Ú.	Memo	
Ú.	Motion papers	
	Documents Not Included in this Brief	

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.

Type <sup>9</sup>	Document Name	Class	Docume	Action Pr	Action Ty	
> Sec	tion: 002 - Correspondence (7 documents)					*
Section: 003 - Letters/Interparte Correspondence (5 documents)						Ì
1	Letter to Chief State Solr	Letters/I	15 Jun 2	Normal	Action	l
12	Letter to Garda Commissioner	Letters/I	15 Jun 2	Normal	Action	
F	Letter from an Garda Siochana	Letters/L.,	15 Jun 2	Normal	Action	
67	Latter from Chief State Colletter	Lattore A	15	Alaemal	Action	3

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

Search									
	Туре	Document Name	Class	Document					
	► Section: 001 - Client Letters								
	Section: 002 - Documents								
F	✓ Section: 003 - Engagement Letters								
		Terms of Engagement	Engageme	30 Sep 2014					
	Section: 004 - Instruction Sheets								
	Section: 005 - Letters/Interparty Correspondance								

TIP: The Column width can be adjusted to make reading document information easier.

## How to flag as a Cover or Main

SM

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.
- 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

1	Create a New Brief Template	×
Based on Brief	Brief for RTA Brennanstown Valley Roundabout	
Title:	Brief for RTA Brennanstown Valley Roundabout	
Author:	Carol Nolan	
Description:	Brief for RTA Brennanstown Valley Roundabout	
	Ok Cancel	

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.

	)		Select Brief (Right-click for Options)	×				
N	ew Br	ief Open Brief						
		Title	Description					
Þ	-	Brief for Sale of 2 Trinity	Brief for Sale of 2 Trinity Close, Rathgar, Dublin 6	$\sim$				
				~				
			Ok Cancel					

- 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.

(Right-click for Options)						×		
New B	rief Open Brief							
	Title	Date	De	scrint	ion			
۰ 🔒	Brief for Road Traffic Ac	25 Oct 2016	Bri	₽₽	Sort Ascending	ction 9 on M50		^
				Ă↓	Sort Descending			
				₽¥				
				2	Group By This Column	-		
					Show Group Panel			
				1	Show Column Chooser			
				Ħ	Best Fit			
					Best Fit (all columns)			
				Ŷ	Filter Editor	_		
							ок Са	incel
				_				

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

	ions)	×			
Nev	w Brief Open Brief				
	Title	Date	Last Updated	Description	
•	Brief for Road Traff	25 Oct 2016	25 Oct 2016	Brief for Road Traffic Accident at Junction 9 on M50	^
					v
				<u>O</u> K <u>C</u> anc	el

- 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

	New Brief Wizard X								
	) <b>K</b> e	eyhous	e	Brief Assembly Wizard					
Tick th	his box to copy t	ent Brief for this Case the most recent Brief for this Case Briefs for this Case							
Туре	Sequence	Section							
ø	1	Cover Letters							
	2	Medical Reports	1						
	3	Opinions Pleadings							
Canc	el			Previous 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.

	New Brief Wizard		×
Keyhou	se	Brief Asseml Wizard	oly
Copy the most recent Brief for this Case Tick this box to copy the most recent Brief for this Tick this box to list all Briefs for this Case Please select the Brief that should be copied to the Ne	Case		
TITLE	DESCRIPTION	Author Finalised	ł
Pleadings & Opinons with Medicals	Brief for Road Traffic Accident at Junction 9 on M50	Brenda Hartle 0	\\bre
Brief for Road Traffic Accident at Junction 9 on M50	Brief for Road Traffic Accident at Junction 9 on M50	Brenda Hartle 0	\\bre
Cancel		Previous	Next

- 5. Select the brief to be used and click Next
- 6. Complete the brief as normal.

## **Generate the Brief**

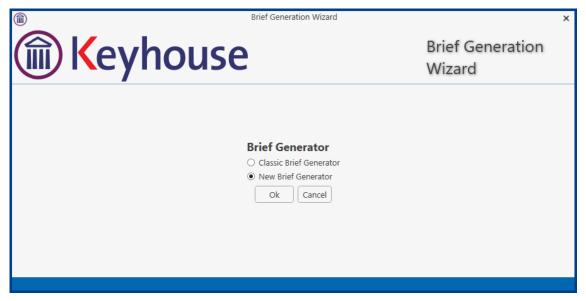
Once you begin to generate your Brief using your PC or laptop to view/use another program will slow down the generation of the brief and impact the performance of the other program.

### 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.

	Brief Generation Wizard	× Brief Generation
🗑 Keyhous	se	Wizard
Print Order — Order Documents as specified during Brief Maintena	NCE Y This option allows you to override the order in which doc	uments appear in the brief.
Page Footer and Table of Content	Footer and TOC Font Arial	
Manually Enter Page Numbering or TOC codes Create PDF Bookmarks	Arial • (TOC) Size: 12 • Bo	old
Left-Align TOC Columns		
Cancel		Previous Next
ne documents in each Section ma		nents as specified during Brief Maintenance

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.

Page

Page Section - Page

Page Numbering -

Section - Desc - Page

- The options for page numbering in the footer are:
- Page: Only the page number is shown;
- Section Page: The section number and the page number are shown;
- Section Desc Page: The section number and description, and the page number are shown.
   Check the 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.

Brief Generation	Wizard X
Keyhouse	Brief Generation Wizard
Print Order	
Order Documents as specified during Brief Maintenance * This option allows yo	ou to override the order in which documents appear in the brief.
Page Footer and Table of Content Page Numbering Section - Desc - Page	Footer and TOC Font         Arial <ul> <li>(Footer)</li> <li>Size:</li> <li>7</li> <li>Bold</li> </ul> NO Footer       High Contrast Footer         Arial <ul> <li>(TOC)</li> <li>Size:</li> <li>12</li> <li>Rold</li> </ul>
Manually Enter Page Numbering or TOC codes Bespoke Footer (This will override some of the settings above) Bespoke TOC Section Naming (This will override some of the settings above)	Arial Y (TOC) Size: 12 Y Bold
Bespoke TOC Page Numbering (This will override some of the settings above)	
Create PDF Bookmarks	
Left-Align TOC Columns	
Cancel	Previous Next

• The following options can be used individually or in combination:

Enters the Document Name in the footer
Enters the current page within the entire Brief
Enters the total number of pages within the entire Brief
Enters the section name
Enters the sequence number of the section (1, 2, 3, etc)
Enters the sequence letter of a section (A, B, C, etc)
Enters the current page within the current Section
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.

Brief Generation	Wizard	×
Keyhouse	Brief Generation Wizard	
Print Order		
Order Documents as specified during Brief Maintenance v This option allows yo	u to override the order in which documents appear in the brief.	
Page Footer and Table of Content		
Page Numbering	Footer and TOC Font	
Section - Page *	Arial Y (Footer) Size: 7 Y Bold	
✓ Include Totals	NO Footer High Contrast Footer	
	Arial Y (TOC) Size: 12 Y Bold	
✓ Manually Enter Page Numbering or TOC codes		
Bespoke Footer (This will override some of the settings above)		
%DocName% - %TotalPage% of %TotalSectionPages%		
Bespoke TOC Section Naming (This will override some of the settings above)		
%SectionNumber% %SectionName%		
Bespoke TOC Page Numbering (This will override some of the settings above)		
%TotalPage%		
✓ Create PDF Bookmarks		
Left-Align TOC Columns		
Cancel	Previous Nex	t

- 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

Select your Output		_
Produce a PDF Document	٠	
Produce a Folder		
Produce a PDF Document		

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

	Brief Generation Wizard		×
() Keyho	use	Brief Generation Wizard	
Adding Documents into Brief. Please wait.			
Current Section: Reports Current Document: Verifying affidavit of Leo \	/aradkar		
Copying Brief to Network Location	Copy to Diary Copy this Brief to the Diary? Yes No		
Section:	3 of 3		
Document:			

#### 9. Click Yes to save to case diary.

Paste Documents	
<b>(</b>	Please choose a Document Class Case: Road Traffic Accident at Junction 9 on M50
Document Class:	Brief to Counsel
	again and remember the last choice I made documents into Case Cancel

- 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.

S .	Search O											
er	b Folder: All											
Fold	9		1	Document Name	Diary Date 🔻	Track Referen	Version	Document Class	Source	From	То	Subject
	•	3		Brief for Road Traffic Accident at Juntion on M50	06 Jan 2020	480211	1	Brief to Counsel	Captured			Brief for Road Traffic Accident at Juntion on M50
	Í	1		Brief for Road Traffic Accident at Juntion on M50	06 Jan 2020	480212	1	Brief to Counsel	Captured			Brief for Road Traffic Accident at Juntion on M50
	1	2		Brief for Road Traffic Accident at Juntion on M50	06 Jan 2020	480213	1	Brief to Counsel	Captured			Brief for Road Traffic Accident at Juntion on M50

**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.

1 A A B I A		8 @ 1 /	1 a o				
Momenanu X							
<ul> <li>□ Brief</li> <li>□ Breadings</li> <li>□ Medical Report</li> </ul>	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 R	eport				
	No.	Description	Date	Page No			
	1	Medical Report from Mr Jones	20 Aug 2019	4			
			2018				

## **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

١						Kej	yhouse Case Mana	gement (CN - Carol I
Home	Case Reports	Phone Log Maintair	n Setup Help					
	4	<b>F</b>			<b>S</b>	4	(	Î
User Setup Administrator	Administration 🔻	Case Work Flow Setup	UDF Form Details Syste		ls Document Assi	sts Personal setting	gs 🔻 Keyhouse C	Control Settings Pac
🔍 Searc	h/Open	\$					÷	
🙀 All Matter	·	Code Las	t Accessed	File Colour	Name [	esc Preferences La	abel Printer Setup	Change Password

3. The following screens will appear.

		Preference		×	I	Preference Preference	×
Main Application User Preferences	Other User Preferences	System Preferences	Logging			Main Application User Preferences Other User Preferences System Preferences Logging	
Show start up page	V			Restore "Do not show again" prompts	Π	My Briefcase	
Show notification to open Case Dia	ry attachment 🛛 🗹			Restore Window Positions	Ш	Do Not Show Briefcase Notification	
Use enter in search boxes					Ш	Show Case Associate Contact Details	
Launch alarm system at startup					Ш	Retain Last Matter Search	
Show application closing prompt	$\checkmark$				Ш	My Overview Settings	
Scan capture rename the source file	e name				Ш	Budget Daily Hours (HH:MM) 7:30 Current WIP Limit	
Completed action ignore what's new	kt prompt				Ш	OS Invoice Limit Use CTRL key to spin minutes mit	
Check Drive Mappings					Ш		
Use Calendar View					Ш	Choose what to show first on the Preview Panel in the Case Diary 🔿 Action Details 💿 Document Preview	
Do not include diary text when ema	illing attachments				Ш	SDLT XML path	
				OK Cancel	Ш	Allow focus to the top after completing an action  🖉	
					Н	OK Cancel	
					'		Ē
١		Preference		×			
Main Application User Preferences	Other User Preferences	System Preferences	Logging				
70 120 (100%)	Font size adjustment						
Allow Spell Check							
Run Local Version							
Disable attachment pasting							
	minutes						
<ul> <li>Do not reload grids on update</li> <li>Disable Hardware Acceleration</li> </ul>							
Disable Hardware Acceleration	ble for selection						
recep classic orier denerator availa	ione for pereculon						
				OK Cancel			

4. The options that can be set up are:

#### **Main Application User Preferences**

Show Start up Page

Show notification to open Case Diary Attachment Use Enter in Search Box

Launch alarm system at setup

## The options visible on this screen may vary depending on options activated by your System Administrator. 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

When a user clicks to open an action, the system will give the action to open the document or the action. This will require the user to click Enter to start a search after the key words have been entered 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
Show Application closing 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	This will allow the user to rename a document in the
name	scan capture folder with the name given to the
name	document in Keyhouse.
Completed action ignore what's next	When this option is ticked, follow on actions in workflow
	will not automatically populate in the case diary.
prompt Check Drive Mannings	Do not tick this box unless instructed to do so by
Check Drive Mappings	
Do not include diany test when empiling	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
Restore Window Positions	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	
	Allows users to create a location outside Kowhouse for
My Briefcase	Allows users to create a location outside Keyhouse for
Show Case Acceptative Contact Datails	ease of exporting documents.
Show Case Associative Contact Details	This will allow the user to see any contacts within an
Datain Last Matter Coanal	associate on the Associates Screen on the Case/Matter
Retain Last Matter Search	To ensure that the Advanced Search screen keeps the
M. O in Collins	last search entered, tick this box.
My Overview Settings	Allows the user to set their own budget in relation to
Characteristic state of the base in	time and fees
Choose what to show first on the Preview	Choose where to see the action or the documents when
Panel in the Case Diary	previewing the action on the Case Diary
SDLT XML path	For UK customers only.
Allow focus to the top after completing	To ensure that the curser stays at the top of the Case
an action	Diary when an action is completed, tick this box.
System Preferences	All states and a state of the state of the states of the states of the
70 120	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. <b>NOTE:</b> 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	Allows the user to continue to have the option to use

223

Generator.

either the Classic Brief builder or the New Brief

selection

#### **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

v Case Copy Case Move	Case Merge Case	Case Import Conflict S	earch GoTo												
Search/Open	8													Open Ca	ses 🗍
II Matters	Code	Last Accessed	File Colour	Name	Description	Fee Code	Fee Earner	File Ref	User2	User3	Started	Department	Work Type	Original Closed Date	
/ly Matters	BAR002/0001														
lecent Matters	FLY001/0001	21 Jan 2016 14:16:23		Jack Flynn	RTA on Ferrybank Duel Carrageway	CN	Carol Nolan				23 Dec 2015	Litigation	Accident		
ontacts	ABB001/0005	17 Dec 2015 11:27:55		George J Abb	RTA The Rise, Stillorgan	85	Brian Sween				23 Sep 2010	Litigation	Accident		
ssociates	BEC001/0001	30 Nov 2015 16:42:16		Angela Beck	Sale of 56 Church Street, Rathgar	8S	Brian Sween				11 Jan 2007	Conveyancing	Unknown Wor		
Ivanced Search	BLA001/0001	20 Nov 2015 14:34:32		Gordon T. Bla	RTA Walkinstown Crossroads, G. Black	8S	Brian Sween	1234T			08 May 2010	Litigation	Road Traffic		
y Invoices	DUN001/0001	02 Sep 2015 12:41:34		Dunnes Store	Slip & Fall on Frozen Food Aisle	8S	Brian Sween				16 Feb 2015	General	Accident		
y Cheques	ODW001/0001	02 Sep 2015 11:59:04		Sean O'Dwyer	Re-mortgage 54 Wellington Road Dublin	JP	Justin Phelan				14 Jan 2011	Conveyancing	Re-mortgage		
one Log	IBS001/0024	02 Sep 2015 10:59:40		Interim Busine	IBS -v- Martin Smyth	8S	Brian Sween				22 May 2012	Debt	Debt Recovery		
m Undertakings	ACC001/0001	01 Sep 2015 12:16:54		Accord Music	Purchase New office 56 Second Street	MW	Martina Win				14 Jan 2010	Commercial	Purchase		
rong Room	SMIY001/0001	01 Sep 2015 11:07:22		Laura Smyth	Laura Smyth v Joe Byrne	MK	Mark Kelly	smy001			01 Sep 2015	Family Law	Circuit Court		
cument Search	NOL001/0001	28 Aug 2015 12:43:35		Paula Nolan	Paula Nolan V Joe Smith	AM	Anne Mellon	0000000			04 Sep 2014	Debt	Circuit Court		
mplate Library	ZZT001/0000	28 Aug 2015 12:37:33		Test New CLie	Document matter	SK	Stephen Ke				27 Mar 2010	General	General		
	EVA001/0002	14 Mar 2014 09:02:49		Evans & Co.	Commercial Lease - Unit 2 Cedar Hall	JP	Justin Phelan				20 Aug 2010	Commercial	Lease		
	222222/2222	14 Mar 2014 09:00:58		Non Assigned	Dictation	8S	Brian Sween				22 Dec 2005	Commercial	Accident		
	BLO001/0004	14 Mar 2014 09:00:32		Joe Bloggs	Commerical Work	SK	Stephen Ke				07 May 2004	Commercial	Lease		
	AAA002/0002	14 Mar 2014 09:00:21		AAA Worldwi	Student Complaint EF	8S	Brian Sween	REF1			14 Aug 2013	Conveyancing	Advice		
	FIN001/0003	14 Mar 2014 08:59:51		Finance Depa	Outstanding Rent 44 South Mall Cork	85	Brian Sween				25 May 2011	Finance	Debt Collection		
	FIN001/0001	14 Mar 2014 08:59:47		Finance Depa	Water Charges at 21 Main Street, Fingal	85	Brian Sween				09 Nov 2011	Finance	Debt Collection		
	ABB001/0004	15 Jan 2014 15:29:19		George J Abb	EPA - Mary James and David Jones	JP	Justin Phelan				22 May 2008	Conveyancing	Re-mortgage		
	EVE001/0003	18 Nov 2013 15:21:25		Ever Green In	Sale of Ravensdale Estate, Wicklow, Co	85	Brian Sween	632001	120056	49575566	02 Dec 2005	Finance	Purchase		
	AAA001/0001			AAA Securitie	Landlord Dispute	MW	Martina Win				06 Jun 2010	Litigation	Action		
	AAA001/0002			AAA Securitie	New Lease 44 Main Street Dun Laoghaire	MW	Martina Win				31 Jan 2010	Commercial	Lease		
	AAA001/0003			AAA Securitie	Slip and fall incident	CN	Carol Nolan				16 Feb 2015	General	General		
	AAA002/0001			AAA Worldwi	Derek Bradley - export to USA Freight c	85	Brian Sween				15 Feb 2012	Litigation	Action		
	ABA001/0001			David Abraha	Family Law	AM	Anne Mellon				20 May 2011	Family Law	Action		
	✓ [Closed] <> 'Y														
	UDE Field														
	ODF Field														
	Prompt				Value					Text					
Tasks	Purchase Price				275000					27500	0				
Search/Open															

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.

Home Case Report	ts PhoneLog Ma	intain Setup Help			Keyhouse Case Mar	nagement (C	N - Carol Nolari - I	0001 / 0729)				Quick Search (Ctrl + Q)
A Copy Case Movi	e Case Merge Case	Case Import	Search GoTo									
Search/Open	8											Open Cases 🛅 😂
All Matters	Code	Last Accessed	Name	Description		Earner	File Ref	Started	Department	Work Type	Original Closed Date	
My Matters	BAR002/0001	21 Jan 2016 14:27:05	Kevin Barrett			il Nolan		20 Nov 2015	Conveyancing	Sale		
Recent Matters	FLY001/0001	21 Jan 2016 14:16:23	Jack Flynn	RTA on Ferrybank Duel Carra	Sort Desareng	I Nolan		23 Dec 2015	Litigation	Accident		
Contacts	A88001/0005	17 Dec 2015 11:27:55	George J Abb	RTA The Rise, Stillorgan	Clear Sorting	Sween		23 Sep 2010	Litigation	Accident		
Associates	BEC001/0001	30 Nov 2015 16:42:16	Angela Beck	Sale of 56 Church Street, Rati		Sween		11 Jan 2007	Conveyancing	Unknown Wor		
Advanced Search	BLA001/0001	20 Nov 2015 14:34:32	Gordon T. Bla	RTA Walkinstown Crossroads	Show Group Panel	Sween	1234T	08 May 2010	Litigation	Road Traffic		
My Invoices	DUN001/0001	02 Sep 2015 12:41:34	Dunnes Store	Slip & Fall on Frozen Food Al	Show Column Choos	er Sween		16 Feb 2015	General	Accident		
My Cheques	ODW001/0001	02 Sep 2015 11:59:04	Sean O'Dwyer	Re-mortgage 54 Wellington I	Best Fit	n Phelan		14 Jan 2011	Conveyancing	Re-mortgage		
Phone Log	IBS001/0024	02 Sep 2015 10:59:40		IBS -v- Martin Smyth	Best Fit (all columns)	Sween		22 May 2012	Debt	Debt Recovery		
Firm Undertakings	ACC001/0001	01 Sep 2015 12:16:54	Accord Music	Purchase New office 56 Second		wartina Win		14 Jan 2010	Commercial	Purchase		
Strong Room	SMIY001/0001	01 Sep 2015 11:07:22	Laura Smyth	Laura Smyth v Joe Byrne	MK	Mark Kelly	smy001	01 Sep 2015	Family Law	Circuit Court		

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.

Column Chooser	×
Address	^
Close Date	
Closed	
File Colour	
File Number	
id 🔺	
Old Ref	
Phone No.	~

CN N	à			
	Code	Last Accessed	Namehone No.	Description
F	BAR002/0001	21 Jan 2016 14:27:05	Kevin Barrett	Sale of 1 High Street, Kells, Co Meath
	FLY001/0001	21 Jan 2016 14:16:23	Jack Flynn	RTA on Ferrybank Duel Carrageway
	ABB001/0005	17 Dec 2015 11:27:55	George J Abb	RTA The Rise, Stillorgan
	BEC001/0001	30 Nov 2015 16:42:16	Angela Beck	Sale of 56 Church Street, Rathgar

- 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 <sup>III</sup> 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**.

Name: My Open Cases	Default 🗌 Shared View Add View	w 😣
View	Default Sh	ared
Open Cases	$\checkmark$	
Closed Cases		
Open and Closed Cases		

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.

Name: My Open Cases	Default 📃 Shared View	Change '	View 🙁
View		Default	Shared
My Open Cases		<ul> <li>Image: A start of the start of</li></ul>	
Closed Cases			$\checkmark$
Open and Closed Cases			$\checkmark$
Open Cases		<b>~</b>	$\checkmark$

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

	) Keyhouse
Please login t	o Keyhouse
	Log in using your Windows ID
	OR
Handler:	
Old Passwor	
Password:	
Confirm:	
	Link this login to your Windows Login
	Login

4. If the password does not meet the policy requirements, the following message will be displayed

Reset Password	
	The password does not meet the password policy requirement.
	Passwords must contain: a minimum of 1 lower case letter [a-z] and
	a minimum of 1 upper case letter [A-Z] and a minimum of 1 numeric character [0-9] and
	a minimum of 1 special character and
	password must be at least 8 characters in length password should not contain any white spaces

- 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.

Please login t	<b>Keyhouse</b>
Handler:	
Password:	
	Login

**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

You are about to be logged out automatically $\qquad \qquad \qquad$								
Please note								
You are about to be logged out due to inactivity								
To continue working, please click Cancel within 30 seconds								
27.29								
Cancel								

Click Cancel to stay logged on.

# **Chapter 20 – Closing Case Management**

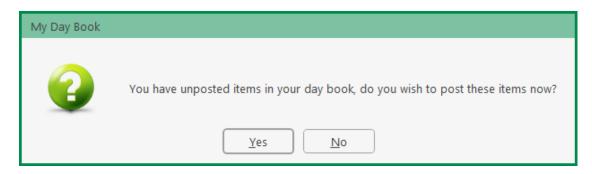
## **Closing Keyhouse**

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

Exiting Keyhouse.	
2	You are about to exit this application. Are you sure?
Do not show again	
<u>Y</u> es	Login as a different user <u>C</u> ancel

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.