

# Keyhouse End User Manual

VERSION NO: 5.4.2.14

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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.

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

# **Chapter 1: Getting Started**

# **Opening Case Management**

- 1. Start Keyhouse by **double-clicking** the Keyhouse shortcut on your Desktop.
- The first time you log in, you will have to use your Handler Code and Password. If you have previously enabled the use of your Windows ID, you may log in without having to enter your password.
- 3. Enter your **Handler Code** (typically your initials) and password. If you wish to log in in future using your **Windows ID**, check the box labelled *Link this login to your Windows Login*
- 4. Once you have logged in, you will be presented with a choice of where to start: **Recent Matters**, **Task Manager** or **My Overview**



	ΙΙΚΑΛΛΛΙΙCΑ
	í) Keyhouse
Please logi	n to Keyhouse
	Log in using your Windows ID
	OR
Handler:	
Password:	
	Link this login to your Windows Login
	E cile alls login to your trindons cogin

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



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

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

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

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

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

🛐 Tasks	Carol Nolan		29 Oc	tober 2014			
My tasks		Recent Matte	ers	Task/Alert			Performance
👺 Team tasks	Code	Name	Description	No Over Due Tasks	30	My Time Day Book	0:25
• • · · · ·	BLA001/0001	Gordon T. Black	RTA Walkinstown Crossroads, G. Black	No OutStanding Tasks	32	Time Recorded this Week	0:0
🗋 Day's tasks	BLA001/0000	Gordon T. Black	0000 Matter				0.0
Next week's tasks	AAA001/0003	AAA Securities Ltd	Sale of 1 Main Street, Laragh, Co. Wickl	Critical Tasks	1	Time Recorded this Month	0:0
Next month's tasks	CUL001/0001	Ann Marie Cullen	Credit Card Debit	Court Dates	2		
Overdue tasks	FIS001/0001	Melinda Fisher	Sale of Lands in Wicklow	High Priority Tasks	c	Fees Issued Current Month	0
Outstanding tasks	DEA001/0000	James Deane	0000 Matter		5	rees issued current month	0
👸 Last week's tasks	CLI001/0001	Bill Clinton	Unfair dismissal by State Department	Phone Message	1	Fees Issued Last Month	0
💼 Last month's tasks	FIT002/0001	Melinda FitzGerald	Sale of lands in wicklow			Fees Issued Year to Date	0
🌛 All tasks	KEL002/0002	Sarah Kelly	Debt Collection				
👌 My Overview	ABB001/0001	George J Abbott	Sale 45 Somserset Road, Dublin 6	Undertakings	0		
	ABA001/0001	David Abrahams	Family Law	Statue Date Approaching	1	Outstanding Invoice	43,320
	DEA001/0001	James Deane	RTA Whites Cross, Stillorgan			Outstanding Fees	35.038
	222222/2222	Non Assigned	Phone Message				
	ABB001/0005	George J Abbott	RTA The Rise, Stillorgan			Debtors Days	1,718
	ZAC001/0000	Irina Zacawski	0000 Matter			Current Work in Progress	2,359
	ABA001/0002	David Abrahams	RTA - Listowel			Draft Invoice	0
		Case Alert					
	Open Matters		3	0		Current Lockup Value	45,679
	My Dormant Matters		2	2			
	No Case where expected in	voivce date has passed		0			
	No. case with no estimate	given	2	9			
Tasks	No. case approaching estin		and the second s	1			

# Chapter 2: Search & Open

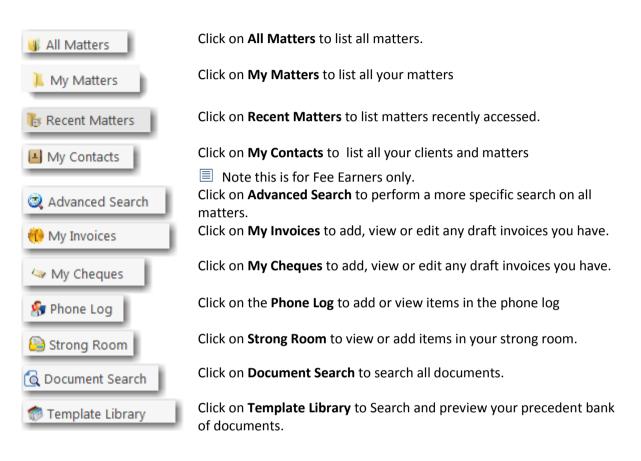
### **The Search Screen**

Home Case Reports		arch Tool	bar		Keyhouse Case Manage	ement (CN -	Carol Nolan - 06:17 / 01:13)	)				Quick Search	(Ctrl + Q) - 🛛
New Case Copy Case Move Case maintenance Case maintenance Search/Open All Matters		Conflict Search Case related GoT		arch b		Fee Code	Fee Earlier File	Colum	n Head	dings		Work Type	Open Cases Max results: 500
Recent Matters	<ul> <li>BRE001/0001</li> </ul>	13 Aug 2015 11:31:44	The Colour			MW		601/001		103 301 2010	LIUGANOI	Accident	original closed bate
Contacts	ZZT001/0001	11 Aug 2015 16:37:51		Test New CLie		BS	Brian Sween					Accident	
Associates	8			Interim Busine	International Business Services Ltd -v- D	BS	Brian Sween			15 Feb 2008	Debt	Debt Collection	
Advanced Search	11		-	Jack Flynn	Sale of House at: 4 The Mews, Rathfarnh	CN	Carol Nolan FLY	001		02 Jul 2015	Conveyancing	Sale	
My Invoices	Na Na	vigation	Bar	Gordon T. Bla	RTA Walkinstown Crossroads, G. Black	BS	Brian Sween 123	4T		08 May 2010	Litigation	Road Traffic	
My Cheques	10	0	-	Jack Flynn	Document matter	SK	Stephen Ke						
Phone Log	FU			Jack Flynn	Purchase of 16 The Haywain, Terenure,	CN	Carol Nolan FLY	002/001		N 4 -			
Firm Undertakings	IBS001/0020	10 Aug 2015 11:43:26		Interim Busine	Gary Neville - Short term loan	BS	Brian Sween				itter Li	IST	

Tip: Click on a column headings to sort alphabetically by that heading eg. Matter Description or click on the pin to apply a filter
 Fee Earner
 The filter is available on Fee Code, Fee Earner, Dept, Work Type, File Colour and closed only.
 Tip: To remove filters right-click and then click on remove filters
 Tip: The number of results returned can be set. The minimum number is 100 and the maximum.

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

# Navigating the Search Screen



## **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.

1					Keyhouse Case Mana
Home Case Report	ts Phone Log Ma	intain Setup Help			
🐴 🝰 🔮	<b>&amp;</b> 🎄				
New Case Copy Case Mov Case maintenar		Conflict Search Case related GoTo	•		
Search/Open	Search				
All Matters	Code	Last Accessed 🔹	File Colour	Name	Description
My Matters	SIM001/0001	20 Jul 2015 17:08:19		Bart Simpson	Sale of House at: 4 The Mews, Rathfarnh
Recent Matters	FLY001/0001	20 Jul 2015 16:33:04		Jack Flynn	Sale of House at: 4 The Mews, Rathfarn
	BRE001/0001	16 Jul 2015 16:23:29		Mike Breeze	Mike slipped an broke his leg.
L Contacts	TJF001/0000	16 Jul 2015 16:23:06		TJ Fox	Document matter
associates	TJF001/0001	16 Jul 2015 15:54:20		TJ Fox	Outstanding debt to PTSB Bank.
💐 Advanced Search	ZZT001/0000	15 Jul 2015 17:28:36		Test New CLie	Document matter
🚺 My Invoices	FOX001/0001	14 Jul 2015 12:13:37		Jennifer Fox	Redundancy advice
a My Cheques	KEO003/0003	06 Jul 2015 09:19:51		Sam Keogh	EPA to Stephen Keogh
😚 Phone Log	BRO001/0001	03 Jul 2015 15:09:49		Kevin Browne	78 Somerset Road, Ealing, London W5 5
👜 Firm Undertakings	DUN /0001	03 Jul 2015 12:03:07		Zach Dunne	Advice on Car Accident
📄 Strong Room	NOL001/0001	03 Jul 2015 12:02:55		Paula Nolan	Paula Nolan V Joe Smith
Ocument Search	DUN001/9902	03 Jul 2015 12:02:44		Dunnes Store	Fall at Meat & Poultry Aisle

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

Home Case Report	ts P	Phone Log Ma	intain Setup Help				Keyhouse Case Manage	ement (CN - C
New Case Copy Case Mov Case maintenar		Merge Case	Conflict Search	Ото				
Search/Open		sale						
I 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
& Associates	~	WEI001/0001	~~~~	~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	James Weis		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**.

						Keyhouse Case Manag	ement (CN -
Home Case Reports	P	hone Log Mai	intain Setup Help				
New Case Copy Case Move Case maintenance		e Merge Case	Conflict Search Case related GoTo				
🔍 Search/Open	5	sale					
All Matters		Code	Last Accessed	File Colour	Name	Description	Fee Earner
Mv 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
LCo acts		FLY001/0001	20 Jul 2015 16:33:04	······································	Jack Elvnn	Sale of House at: 4 The Mews, Bathfarn	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 eg. "Sale".
- 4. **Double click** the required matter to open the case diary for this matter.

### How to Search Open and Closed Cases

- 1. Click on **Search/Open** on the Navigation bar.
- 2. Click on All Matters.
- Click on Standard view tool located on the following list of views will appear.

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

- Click on Closed Cases to search only closed cases
- Click on Open Cases to search only open cases.
- Click on Open and Closed to search both lists.
- Click on Standard View to return to the default view.
- 4. Input a key search word in the Search Box: the search criteria will be applied as you type.
- 5. **Double click** the required matter to open the closed case diary for this matter.
  - Note no amendments can be made in the case diary until the case is re-opened. See the Chapter 16 for further details.

### **Search Contacts**

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

& 4	<u> </u>												
ase Copy Case Mov Case maintenar	Case Merge Case	Conflict Search Case related GoTo											
earch/Open	My Contact												
Matters Matters	Search												
ent Matters	Client Code	Name	Address				Telephone		Email				Fe
itacts ociates	AAA001	AAA Securities Ltd	44 Main Street Dun Laoghaire 0			012112112						MW	
anced Search	AAA002	AAA Worldwide Remo	CORK			021 1241241 mareynol		mareynolds	olds@AAAworldwideremovals.ie			SK	
Invoices Cheques	ABA001	David Abrahams	Dublin 2			01-2902222 d.abrahar		d.abraham:	ams@gmail.com			AM	
ne Log 1 Undertakings	ABB001	George J Abbott	60 Somerset Road, Ranelagh,				01-5656712		gabbott@id	ol.ie			BS
ong Room	ABB002	Abbie Lynch	Dubin 12 56 Second Street Bray				01 456789 a		a.lynch@ho	a.lynch@hotmail.com			SK
ument Search 1plate Library	ACC001	Accord Music World Ltd					01 200000						MW
	AIG001	Allied Investment Group					1234567890		info@aigleg	info@aiglegal.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				

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

My Contact												
accord	6	3										
Client Code	Name	Address			1	Telephone		Email				Fe
ACC001	Accord Music World Ltd	56 Second Street Bray										мw
Matters ( ACC	:001)											
Search		7										
Case Code	File Color	Description	Fee Earner	Deptment	Worktype	Started	Case Code	Name	User1	User2	User3	Privileges
ACC001/0002		Sale 123 Bishops Street	Martina Wint	Commercial	Sale	14 Jul 2010	ACC001	Accord Music				-1
ACC001/0001		- chase Now office 5 aco	- view	ercial	Purchase-	~100.20/~	-so 02	manard Music	· · · · · · · · · · · · · · · · · · ·		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

 $^{\texttt{W}}$  Tip: To view further details about a client double click the required client record.

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

### **The Advanced Search**

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

				Keyhouse Case Management (C	N - Carol Nolan - 00:00 / 00:00 )				🔍 Quick Search (Ct	rl + Q) -	ð
Home Case Report	s Phone Log Maintain Setup He	dp									
ew Case Copy Case Movi Case maintenar	Conflict Search Conflict Search Case Merce Case	Goto									
Search/Open	Search: abrahams									🕨 Go 🏋 Re	eset
	In fields: 🗹 Client Name 🗹 Ca	ase Description 🗹 Client Ad	ddress 🗹 Code 🗹 Old	Ref 🗹 File Ref							
All Matters	And Y Client Name:							And v	File Ref:		
My Matters	And Y Matter Desc.:							And v	User Field 2:		_
Recent Matters Contacts	And Y Client Address:							And v			-
Associates											
Advanced Search	And Y Matter Code:	And Y Old Ref:						And v	Your Ref:		
My Isvoices	And Y Fee Earner:	✓ And ✓ Dept:						And Y	WorkType:		
My Cheques										Max. results:	
Phone Log	Time Code 🔍	Name	File Colour	Client Address	Description	F/e	Team	Der	t File Ref	Old Ref	
Firm Undertakings	ABA001/0001 David Abrah	ams		Mayfair Street Dublin 2	Family Law	AM	CON	FAM			
Strong Room	ABA001/0002 David Abrah	ami	122	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. Keset

### "OR" Search

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

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

Search: Irela	nd					
In fields:	✓ Client Name	Case Description	Client Address	Code	Old Ref	File Ref

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

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

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

#### Keyhouse

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 🗹 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 Y Dept:
hannon p	

### "And" Search

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

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

Search:		
In fields:	Client 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 V 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.

### **My Matters**

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

In fields: 🗹 Client	Name 🗹 Case Description 🗹 Client	Address 🗹 Code 🗹 Old R	ef 🖌 File Ref			
And Y Client Nam	ie:					
And Y Matter De	sc.:					
And Y Client Add	ress:					
And Y Matter Co	de: And Y Old Ref:					
And Y Fee Earner	: And v Dept:					
Time Code 🤇	Name	File Colour	Client Address	Description	F/e	Tear
BLA001/0001	Gordon T. Black	23 Ellis	Park Rathmines Dublin 6	RTA Walkinstown Crossroads, G. Black	BS	COM
BLA001/0002	Gordon T. Black	23 Ellis	Park Rathmines Dublin 6	2 Trinity Close, Rathgar, Dublin 6	BS	COM
	Gordon T. Black	23 Ellis	Park Rathmines Dublin 6	Purchase of 8 Clonattin Hills,	SK	COM
BLA001/0004				Wicklow.		

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

### Searching using a Wildcard

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

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

### Manipulating the Search Screen

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

### How to Sort Column Headings

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

	Code	Last Accessed	File Colour	Name	Description	Fee Co	Fee Earner
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 Joiury at work	CN	Carol Nolan

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



\*

Sort Ascending 

💱 Clear Sorting

😤 Group By This Column Show Group Panel Chow Column Chooser 🛱 Best Fit Best Fit (all columns 😵 Clear Filter Filter Editor

### 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.

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

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

How to	Group	by	Column
--------	-------	----	--------

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

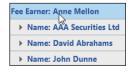
₩ţ	Sort Ascending
₹Ļ	Sort Descending
2¥	Clear Sorting
в	Group By This Column
-	Show Group Panel
1	Show Column Chooser
₽	Best Fit
	Best Fit (all columns)
Ŷx	Clear Filter
٩	Filter Editor

S	Search							
	Code	Last Accessed	File Colour	Name				
Þ	▶ Fee Earner: Admin							
▶ Fee Earner: Anne Mellon								
	▶ Fee Earner: Brian Sweeney							
	► Fee Earner: Care	ol Nolan						

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

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

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



🖤 To return to the standard	Standard View
view click on the view tool	View
leasted on the security have	Open Cases
located on the search bar	Closed Cases
to show a list of available	Open and Closed Cases
views. Select Standard	Standard View
View.	

### **Document Search**

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

### How to open the Document Search

- 1. Click on Search/Open, then on Document Search
- 2. Input the search keywords on the Document Search screen.
- Choose whether you want to search by the Document Name or by Diary Text.
- 4. Optional -
  - Select a client, or leave blank to search against all clients.

	eyhouse	
Search:		
	Search Document Name only	
	Search Diary Text also	
Client:	Enter (part of) Client Name or Search for Client	
Case / Matter:	Enter (part of) Case Description or Search for Case	
	P Search K Clear Advanced ⊗	

- Select a matter or leave blank to search against all matters.
- 5. Click Search. A list of documents that match the criteria will be displayed

# **Chapter 3: Creating New Clients and Cases**

# The New Case Wizard

Create a New Case for an Existing Client

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



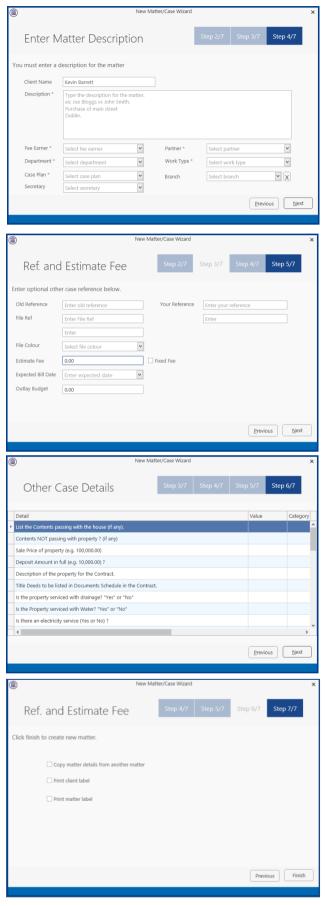
- 2. The *New Matter/Case Wizard* will open. The first screen contains a welcome message. Click Next.
- 3. The default option is to set up a new case for an existing client or contact.
- 4. Input all or part of the client's name or code in the search box. The search results will update as you type.
  - You can sort the columns by clicking on the column headings.
- 5. **Select** the **client** required and click **Next**. In this case, the wizard will skip Step 3 and you will move immediately to Step 4.
- 6. If the client is not an existing client or contact, select *Client is not listed above* and click **Next**.
- The screen for Step 3 asks for details of the new client. Type the first three letters of the Client's surname into the box for *Client code*. The system will complete the code by adding three digits.
- 8. As well as *Client code*, *Client name* and *Fee Earners* are required fields.

				tter/Case Wizard				
				,				
N.I.		F		Step 1/7	Step 2/7	Stop 2/7	Stop 4/7	
N	ew or	Existing Cli	ient	Step 177	Step 2/7	Step 3/7	Step 4/7	
Select th	ne option th	at describes the acti	ion you wish to	take				
		g client for an matter						
	Code	Name		Address				
	AAA001	AAA Securities	: Ltd	44 Main Street			^	
	AAA002	AAA Worldwid		South Mall				
	ABA001	David Abrahan		123 Mayfair Str	eet			
	ABB001	George J Abbo	ott	60 Somerset Ro	ad,			
	ABB002	Abbie Lynch		14 The Mews			~	
	۲						>	
0.0	iont is not list	ed above. Create new c	light for this new r	natter				
0 Cli	ient is not list	ed above. create new c	lient for this new r	natter		Previ	ous <u>N</u> ex	
						Flevi		
			New Ma	tter/Case Wizard				
N	ew or	Existing Cli	ient	Step 1/7	Step 2/7	Step 3/7	Step 4/7	
		Line in g on						
Select th	he option th	at describes the acti	ion you wish to	take				
Selection	ect an existing	g client for an matter						
	keogh		⊗					
	Code	Name		Address				
	Code KEO003	Name Sam <mark>Keogh</mark>		Main Street			^	
			h				^	
	► KEO003	Sam <mark>Keogh</mark>	h	Main Street			^	
	► KEO003	Sam <mark>Keogh</mark>	h	Main Street			^	
	KEO003 ZZKE01	Sam <mark>Keogh</mark>	ħ	Main Street			~	
	► KEO003	Sam <mark>Keogh</mark>	ĥ	Main Street			· · · · · · · · · · · · · · · · · · ·	
Odi	<ul> <li>KE0003</li> <li>ZZKE01</li> <li></li> </ul>	Sam <mark>Keogh</mark> Stephen <mark>Keogl</mark>		Main Street			• •	
O cli	<ul> <li>KE0003</li> <li>ZZKE01</li> <li></li> </ul>	Sam <mark>Keogh</mark>		Main Street		Provide	ous Nex	
) cli	<ul> <li>KE0003</li> <li>ZZKE01</li> <li></li> </ul>	Sam <mark>Keogh</mark> Stephen <mark>Keogl</mark>		Main Street		Previ	ous <u>N</u> ex	t
	<ul> <li>KE0003</li> <li>ZZKE01</li> <li></li> </ul>	Sam <mark>Keogh</mark> Stephen <mark>Keogl</mark>	lient for this new r	Main Street 1 Main Street natter		Previ	ous <u>N</u> ex	t
	<ul> <li>KE0003</li> <li>ZZKE01</li> <li></li> </ul>	Sam <mark>Keogh</mark> Stephen <mark>Keogl</mark>	lient for this new r	Main Street		Previ	ous Nex	t
	<ul> <li>KE0003</li> <li>ZZKE01</li> <li></li> </ul>	Sam <mark>Keogh</mark> Stephen <mark>Keogl</mark>	lient for this new r	Main Street 1 Main Street natter		Previ	ous Nex	t
<b>)</b>	KE0003     ZZKE01        <	sam keogh Stephen Keogl ed above. Create new c	lient for this new r	Main Street 1 Main Street natter	Step 2/7	Previ	ous Nex	t
<b>)</b>	KE0003     ZZKE01        <	Sam <mark>Keogh</mark> Stephen <mark>Keogl</mark>	lient for this new r	Main Street 1 Main Street 1 Main Street	Step 2/7			t
) Er	KE0003     ZZKE01              ient is not list	ed above. Create new c	lient for this new r New Ma	Main Street 1 Main Street 1 Main Street	Step 2/7			t
) Er	KE0003     ZZKE01              ient is not list	sam keogh Stephen Keogl ed above. Create new c	lient for this new r New Ma	Main Street 1 Main Street 1 Main Street	Step 2/7			t
) Er Please e	KE0003     ZZKE01              ient is not list	ed above. Create new c	lient for this new r New Ma	Main Street 1 Main Street 1 Main Street	Step 2/7			t
Er Please e	KE0003     ZZKE01              ient is not list	sam keogh Stephen Keog ed above. Create new c ient Details w clients details belo	lient for this new r New Ma	Main Street 1 Main Street 1 Main Street	Step 2/7			t
Er Please e Cliu	kE0003     ZZKE01              ient is not list       otter Cl       inter the ne       enter the ne       enter code *	sam keogh Stephen Keog ed above. Create new c ient Details w clients details belo FLY Enter client name	lient for this new r New Ma	Main Street 1 Main Street 1 Main Street	Step 2/7			t
Er Please e Cliu Sal	KECO03     ZZKE01     Clear is not list     clear is not list     clear the ne ent code " ent name " lutation	ed above. Create new c ient Details w clients details belo <u>FLV</u> Enter client name Enter salutation	lient for this new r New Ma	Main Street 1 Main Street 1 Main Street	Step 2/7			t
Er Please e Cliu Sal	KE0003     ZZKE01 <t< td=""><td>sam keogh Stephen Keog ed above. Create new c ient Details w clients details belo FLY Enter client name</td><td>lient for this new r New Ma</td><td>Main Street 1 Main Street 1 Main Street</td><td>Step 2/7</td><td></td><td></td><td>t</td></t<>	sam keogh Stephen Keog ed above. Create new c ient Details w clients details belo FLY Enter client name	lient for this new r New Ma	Main Street 1 Main Street 1 Main Street	Step 2/7			t
Er Please e Cliu Sal	KECO03     ZZKE01     Clear is not list     clear is not list     clear the ne ent code " ent name " lutation	ed above. Create new c ient Details w clients details belo <u>FLV</u> Enter client name Enter salutation	lient for this new r New Ma	Main Street 1 Main Street 1 Main Street	Step 2/7			t
Er Please e Cliu Sal	KECO03     ZZKE01     Clear is not list     clear is not list     clear the ne ent code " ent name " lutation	ed above. Create new c ient Details w clients details belo <u>FLV</u> Enter client name Enter salutation	lient for this new r New Ma	Main Street 1 Main Street 1 Main Street	Step 2/7			t
Please e Cliu Cliu Sal Ad	KECO03     ZZKE01     Clear is not list     clear is not list     clear the ne ent code " ent name " lutation	sam keogh Stephen Keog ed above. Create new c ient Details w clients details beloc FLY Enter client name Enter client address	lient for this new r New Ma	Main Street 1 Main Street 1 Main Street		Step 3/7		t
Please e Cliu Cliu Sal Ad	kcooos     zzkeo1     zzkeo1     ent is not list     enter the ne ent code * ent name * lutation dress	sam keogh Stephen Keog ed above. Create new c ient Details w clients details belo FLV Enter client name Enter client address Enter client address Enter telephone	lient for this new r New Ma	Main Street I Main Street Main Street I Main Street	Enter f	Step 3/7		t
Er Please e Clii Clii Sala Ad	kcoooa     zzkeo1     zzkeo1     enter cl enter cl ent code " ent name " lutation dress lephone bbile	ed above. Create new c itent Details w clients details belo FLY Enter client address Enter client address Enter telephone Enter mobile number	Tient for this new r       New Ma       5	Main Street I Main Street Main Street Main Street I Main Street Step 1/7 Fax Email	Enter f	Step 3/7 ax number email ID	Step 4/7	t
Er Please e Clii Clii Sala Ad	kcooos     zzkeo1     zzkeo1         conternent is not list     conternent is not list     enter the nee     ent code *     ent name *     utation     dress     lephone	ed above. Create new c ient Details w clients details belo FLV Enter client address Enter client address Enter telephone Enter mobile number Select fee earner	Tient for this new marked the second se	Main Street I Main Street Main Street Main Street I Main Street Step 1/7 Fax Email	Enter f	Step 3/7	Step 4/7	t
Er Please e Clii Clii Sala Ad	kcoooa     zzkeo1     zzkeo1     enter cl enter cl ent code " ent name " lutation dress lephone bbile	ed above. Create new c itent Details w clients details belo FLY Enter client address Enter client address Enter telephone Enter mobile number	Tient for this new marked the second se	Main Street I Main Street Main Street Main Street I Main Street Step 1/7 Fax Email	Enter f	Step 3/7 ax number email ID	Step 4/7	

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

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

- Fee Earner handling the matter
- Department (e.g. Conveyancing, Litigation)
- Case Plan (i.e. workflow)
- Secretary the person working on the case
- The *Partner* with responsibility for the matter
- Work Type the workflow to be used
- **Branch** will indicate if branch of the firm.
- 10. Click **Next** to continue to the next step. Most of the information sought by this screen is optional but that shown in bold italics below may be required, depending on your system settings:
  - Old Reference
  - Your Reference (i.e. the client's reference, if any)
  - Three additional reference fields, the prompts for which may vary from one system to another
  - The File Colour option will allow you to set the colour as the matter is being created.
  - The *Estimate of Fees* check the box if the fees are fixed
  - The Expected Bill Date
  - The Budget Outlay
- 11. Click **Next** to continue to the next screen. Here you will be given a number of questions which, when answered, will allow you to add in Extra Case Details. The questions asked will vary depending on the Case Plan selected.
- 12. Click **Next** to continue to the final screen.
- 13. There are three final options on this screen, including printing a client and/or matter label.
  - If you choose to copy details from another matter, a new wizard will start. See the next



section, Copy Matter Details for more information.

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

### **Copy Case Details**



- 1. Click on the **Copy Case tool** copy **Case** located on the **Case** tab of the Ribbon to open the **Copy Case/Matter Wizard**, which starts with a welcome screen.
  - Note: As seen in the previous section, the Copy Case Wizard may also be started by checking the relevant box on the final screen of the New Case Wizard.

Со	py Case/N	latter Wizard	Step 1/6	Step 2/6 Step 3/6	
Matte	rr/Case Copy case det	ails based on previous matte	r copied		
	Matter code	AAA001/0004			
Destir	nation Case Select a destin	ation matter code where the	selected codes has to	be copyied	
	Matter code	Please select matter code			
				Previous	ext

- 2. Click **Next** to continue to Step 2.
- 3. Select a source matter by clicking the browse button.
  - This will bring up a matter list which may be searched as described in Chapter 2.
- 4. **Double-click** the matter from which the details are to be copied. The matter list will close and the code of the selected

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

- 5. Select the destination matter in the same way.
  - Note if you started the Copy Case wizard from the final screen of the New Case wizard, the destination matter will already be filled in.
- Click Next to continue to Step 3, which lists the User Defined Fields (UDFs) which are in use in the source matter.
- 7. 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.
- 8. Check the corresponding boxes to select the fields which, together with their values, should be copied to the destination matter.

		44 Ellis Drive Rathmines Dublin 8	Sale of Village Hall	
02/0001	Abbey & Procter	14 The Mews Dublin 12	Commercial	
2/0001	Melinda FitzGerald	12 Eaton Brae Orwell Road Rathgar Dublin 14	Sale of lands in wicklow	
01/0001	Gordon T. Black	23 Ellis Park, Rathmines, Dublin 6.	RTA Walkinstown Crossroads,	G. Black
01/0000	Gordon T. Black	23 Ellis Park, Rathmines, Dublin 6.	0000 Matter	
001/0003	AAA Securities Ltd	44 Main Street Dun Laoghaire Co Dublin	Sale of 1 Main Street, Laragh,	Co. Wickl
01/0001	Melinda Fisher	12 Eaton Brae Orwell Road Rathgar Dublin 6	Sale of Lands in Wicklow	
001/0000	James Deane	9 Northbrook Park, Ranelagh, Dublin 6.	0000 Matter	
01/0001	Bill Clinton	Main Street Bray Co Wicklow	Unfair dismissal by State Depa	rtment
02/0002	Sarah Kelly	IMI sandyford Dundrum Dublin 14	Debt Collection	
01/0001	George J Abbott	60 Somerset Road, Ranelagh, Dublin 6.	Sale 45 Somserset Road, Dubl	in 6
01/0001	David Abrahams	123 Mayfair Street Dublin 2	Family Law	
				ancel
		Copy Case/Matter Wizard		×
	© Copy Case/Matte		Step 2/6 Step 3/6	×
	-		Step 2/6 Step 3/6	×
	Copy Case/Matte		Step 2/6 Step 3/6	×
	Copy Case/Matte Matter/Case Copy case details bas	er Wizard Step 1/6	Step 2/6 Step 3/6	×

elect a destination matter code where the selected codes has to be copy

Matter code Please select matter code ....

	)		Copy Case/Mat	ter Wizard	×
	(	Сору Са	ase/Matter Wizard	Step 1/6 Step 2/6 Step	3/6
			Drag a column header here h	group by that column	
		Group	Detail	Value	
			"I" if single or "we" if joint ?	I	
	•		"my" if the client is single else "	my	
			Estimated Date of Closing.	15th March 2009	
			Folio Number ?	98659	
			Townland		
	9		Which County ?	County Dublin	
			Date of Contract	N/A	
			Loan Account Number ?	1258745 AE	
			Balance of Sale Price ?	587,000	_
T			Agreed Valuation of Househol	12,000	
			Is the property the Vendor's Fa	Yes	
			Has there been any unauthoris	No	
			Duration of Lease term.	N/A	

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

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

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



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

	(	Copy Ca	se/Matte	r Wizard Step 3/6 Step 4/6 S	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

# **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.

۲			Keyhouse Cas	e Management (CN - Carol Nolan - 00.00 / 07:30)		Quick Search (Ctrl + Q) – 🗖 🗙
Home Case Reports	Phone Log Maintain Setup Help					
📡 🚔 0		Ò				
New Item  Print  Captu Actions	Documents Action Start Timer Po					
	Case: ABA001/0001	David Abrahams				Tel: 01-2902222
📩 Client/Case	Linked Cases	Family Law				F/e: AM
Case Diary		,				
Document Manager	WARNING : Invoices outstanding over 1 Ye	ars 5 Months 17 Days .				Ignore Show me
Current Client Details	WARNING : No activity on this file in over 1					Ignore Show me
Other Case Details	Search				Standard View	Preview *
🖀 Associates	and a second sec					
Critical Information	C A P D A Date	Time Handler 17:16 CN	Synopsis		Action Co F G02	
🛶 Know Your Client	27 Jun 2014	11:19 MW	Letter to Client Undertaking changed by BRIANS		ADMUD	Preview Document
A/c Ledger	19 Jun 2014	11:41 BS	Invoice No:230		D801 P	ABA001/0001/AM/
Time Ledger	🖉 🧾 🕴 19 May 2014	16:32 BS	Letter from Accountant		G26 P	
😺 Debt Ledger	S 01 May 2014	23:54 BS	Invoice No:229		D801 P	02 November 2015
Reserve Ledger	🍯 🍮 🛛 🕴 01 May 2014	22:29 BS	Email From:keyhousedemo@gmail.com - N	lobile Call to Brian Sweeney	EMI P	
Undertakings	🍯 🇢 🕴 01 May 2014	12:30 BS	Email From:brian@keyhouse.ie - Practice M	anagement Review Age	EMI P	David Abrahams
Strong Room	🍯 🎐 🕴 01 May 2014	00:00 BS	Email To: - Financial Trends for the Econo		EMI 🖗	123 Mayfair Street
Strong Room	S 27 Feb 2014	09:01 BS	David Abrahams		PHE 🔛	Dublin 2
	🍼 🚔 🕴 27 Feb 2014	07:08 BS	Email To:brian@keyhousedemo.ie - Sample	Re-	EMI P	
	If Jul 2013	15:54 BS	Letter to Solicitor re title Letter to Allsop &	Case Diary showing	G03 P	
	S 🚇 🕴 09 May 2013	08:47 BS	Accountants Letter	Case Dialy showing	G13 P	
	S 17 Apr 2013	11:24 BS	Brian	1) Task completed	P	$\left( - \right)$
	S 🗢 🕴 17 Apr 2013	10:27 BS	Email To: - Copy Land Folio	I) Task completed	EMI P	B Document
	C 21 Mar 2013	08:43 BS	David	2) Future Tasks	рно Р 613 Р	Document
		22:29 BS 18:08 BS	Innovation Ad Letter to Solicitor re Financial Statement Let		G13 P G03 P	Preview
	18 Dec 2012     16 Nov 2012	09:11 BS	Email From: "Martina Winters" <martina@ke< td=""><td></td><td>603 12</td><td>rieview</td></martina@ke<>		603 12	rieview
	S 15 Nov 2012	14:57 BS	Letter to Solicitor re Proceedings Letter to			
	131407 2012	14.57 85	Letter to solicitor re proceedings cetter to	Feter D. Julies & Co.	Documents	ours sincerely,
	Attachments Search				Bocamento	
Tests	Type Document			Version Date Document Classical	Generated	
Tasks	Letter to Client			1 02 Nov 2015 Clicate		
Search/Open						-
Client/Case						*
Time Costing						CN: Carol Nolan   Monday, 02 November 2015   17:16d

### **Standard View**

# **Configuring the Case Diary Screen**

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

### How to Configure your Case Diary Screen

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

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

#### Sample 1: Standard Screen with fixed Floating Document Preview Pane

#### How to create this view:

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

Client/Case	Case:	ABAUC	1/000			David Ab	rahams				Tel: 01-2902
Case Diary	Linke	d Case	5			Family La	w				F/e: AM
Document Manager Current Client Details	1	Sea	rch						Standard V	iew 📃	Preview
Current Case Details	Acti	A	P 0	. A.	Date	Time	Handler	Synopsis	Action Co.	. F	Letter to Client
Other Case Details	9	8			02 Nov 2015	17:16	CN	Letter to Client	G02	P ^	Preview Document
Associates		<b>e</b> ()	1		27 Jun 2014	11:19	MW	Undertaking changed by BRIANS	ADMUD	P	17.000.0000.000
Critical Information		2			19 Jun 2014	11:41	BS	Invoice No:230	D801	P	ABA001/0001/AM/
Know Your Client		5 📒			19 May 2014	16:32	BS	Letter from Accountant	G26	P	
	(	2			01 May 2014	23:54	BS	Invoice No:229	DB01	P	02 November 2015
A/c Ledger		5 🗢		8	01 May 2014	22:29	BS	Email From:keyhousedemo@gmail.com - Mobile Call to Brian Sweeney	EMI	P	
Time Ledger		5 🗢		8	01 May 2014	12:30	BS	Email From:brian@keyhouse.ie - Practice Management Review Age	EMI	P	David Abrahams
Debt Ledger		5 🗢		1	01 May 2014	00:00	BS	Email To: - Financial Trends for the Econo	EMI	P	123 Mayfair Street
Reserve Ledger Undertakings		5 C			27 Feb 2014	09:01	BS	David Abrahams	PHE	P	Dublin 2
Undertakings		5 🗢		1	27 Feb 2014	07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for Key Performa	EMI	P	
Strong Room		5		1	16 Jul 2013	15:54	BS	Letter to Solicitor re title Letter to Allsop & Browne	G03	P	
a ong room		5 0		8	09 May 2013	08:47	BS	Accountants Letter	G13	P	
		5 C			17 Apr 2013	11:24	BS	Brian		P	
		5 🗢		8	17 Apr 2013	10:27	BS	Email To: - Copy Land Folio	EMI	P	Re: Family Law

#### 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		01/000			David Ab	pranams				Tel: 01	.29022
Case Diary	Link	ed Cas	es			Family La	9W				F/e: Ah	м
Document Manager Current Client Details		😂 Se	arch						Standard Vi	ew 🔲	Preview	
Current Client Details	Act	C A.	. P I	) A	Date	Time	Handler	Synopsis	Action Co	F	Letter to Client	
Other Case Details	00	Ħ		ų	02 Nov 2015	17:16	CN	Letter to Client	G02	P ^	Preview Document	
ssociates		<b>#</b> 0	1		27 Jun 2014	11:19	MW	Undertaking changed by BRIANS	ADMUD	P		
ritical Information		4			19 Jun 2014	11:41	BS	Invoice No:230	D801	P	ABA001/0001/AM/	
now Your Client		ଏ 🤘			19 May 2014	16:32	BS	Letter from Accountant	G26	P		
		<b>S</b>			01 May 2014	23:54	BS	Invoice No:229	D601	P	02 November 2015	
/c Ledger		چ ک			01 May 2014	22:29	BS	Email From:keyhousedemo@gmail.com - Mobile Call to Brian Sweeney	EMI	P		
me Ledger		S 🔮			01 May 2014	12:30	BS	Email From:brian@keyhouse.ie - Practice Management Review Age	EMI	9	David Abrahams	
bt Ledger		چ ک			01 May 2014	00:00	BS	Email To: - Financial Trends for the Econo	EMI	9	123 Mayfair Street	
serve Ledger		\$ ک			27 Feb 2014	09:01	BS	David Abrahams	PHE	P	Dublin 2	
ndertakings		S 🖻			27 Feb 2014	07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for Key Performa	EMI	9		
ong Room		<b>S</b>		÷	16 Jul 2013	15:54	BS	Letter to Solicitor re title Letter to Allsop & Browne	G03	9		
ong Room		S 0			09 May 2013	08:47	BS	Accountants Letter	G13	9		
		ۍ ک			17 Apr 2013	11:24	BS	Brian		9		
		٠			17 Apr 2013	10:27	BS	Email To: - Copy Land Folio	EMI	P	Re: Family Law	

### 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.

D							Keyhouse Case Management (CN - Carel Noten - 0001 / 0729)	Search (Ctrl + Q)	- 5
Home Case Report	orts Pho	one Log M	laintain	Setup Help					
lew Item - Print - Cap			ote Acti	on Start Timer Pro					
Client/Case	Case	BAR002/00	01	4)	Kevin Bar	rett		т	Tel: 01-569 14
Case Diary					Sale of 1	High Street,	Kells, Co Meath	F/	/e: CN
Document Manager	WAR							Ignore	e Show m
Current Client Details					-				_
Current Case Details		Search Search						Standard	View
Extra Case Details	Acti	C A P	D A.	Date	Time	Handler	Synopsis	Action Co	0 F
Associates Critical Information	9								r - 1
Critical Information Know Your Client		<b>S</b>	1	30 Nov 2015	16:37	CN	Letter to Client 1234	G02	P
Linked Cases		<b>S</b>		30 Nov 2015	14:22	CN	Test Doc	dsfd	P
		<b>S</b>		30 Nov 2015	14:21	CN	Letter to Bank re Redemption Value	dsfd	P
A/c Ledger Time Ledger		<b>S</b>		30 Nov 2015	14:20	CN	Contract of Sale	dsfd	P
Debt Ledger		<b>S</b>	- 8	30 Nov 2015	11:46	CN	Contract for Sale Draft 1	TDOC	P
Reserve Ledger		<b>S</b>		30 Nov 2015	11:46	CN	Contract for Sale Draft 2	G11	P
Undertakings		<b>S O</b>		23 Nov 2015	10:27	CN	Scanned Post/Mail	G22	P
Strong Room		🚭 🗢		23 Nov 2015	10:27	CN	Email From: - Email	EMI	P
strong Room		S 📒		23 Nov 2015	10:26	CN	Note to File	G199	9

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 (CN - Carol Nolan - 0001 / 0729)			Quick Search (Ctrl + Q) - 🗗
Home Case Report	rts Phor	e Log Mair	iintain Setup Help	p					
lew Item • Print • Capt		rate Complete	e Action Start Timer P Account						
Client/Case	Case:	BAR002/0001	1			Kells, Co Meath			Tel: 01-569 1- F/e: CN
Document Manager	WARN	ING : Money							Ignore Show n
Current Client Details		Search					Standard	View	Preview
Extra Case Details	Acti	C A P D	A Date	Time	Handler	Synopsis	Action Co	F	Letter to Client 1234 🥠 🗉
Associates Critical Information	8		23 Dec 2015	12:22	CN	Letter to Client ?	G02	P	Preview Document
		<u> </u>    .	30 Nov 2015	16:37	CN	Letter to Client 1234	G02	1	BAR002/0001/CN/AM
Know Your Client		S	# 30 Nov 2015	14:22	CN	Test Doc	dsfd	P	Britooziooviicivian
Linked Cases		<b>S</b>	# 30 Nov 2015	14:21	CN	Letter to Bank re Redemption Value	dsfd	P	
Linked Cases	(	5 5	# 30 Nov 2015     # 30 Nov 2015	14:21 14:20	CN CN	Letter to Bank re Redemption Value Contract of Sale	dsfd dsfd	P	30 November 2015
<sup>9</sup> Linked Cases A/c Ledger Time Ledger	(								30 November 2015
<sup>°</sup> Linked Cases A/c Ledger Time Ledger Debt Ledger	(	5	# 30 Nov 2015	14:20	CN	Contract of Sale	dsfd	P	
<sup>1</sup> Linked Cases A/c Ledger Time Ledger Debt Ledger Reserve Ledger		S S	<ul> <li>₽ 30 Nov 2015</li> <li>₽ 30 Nov 2015</li> </ul>	14:20 11:46	CN CN	Contract of Sale Contract for Sale Draft 1	dsfd TDOC	P	30 November 2015 Kevin Barrett 1 High Street
Know Your Client Unked Cases A/c Ledger Time Ledger Debt Ledger Reserve Ledger Undertakings Strong Room		5 5 5	#         30 Nov 2015           #         30 Nov 2015           #         30 Nov 2015	14:20 11:46 11:46	CN CN CN	Contract of Sale Contract for Sale Drah 1 Contract for Sale Drah 2	dsfd TDOC G11	222	Kevin Barrett

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

### Warning Messages

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

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

### How to Show or Ignore a Message

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

Case: AAA001/0001 AAA Securities Ltd Landlord Dispute	Tel: 012112112 F/e: MW					
WARNING : Invoices outstanding over 2 Years 9 Months .	Ignore Show me					
WARNING : No activity on this file in over 33 months.	Ignore Show me					

- **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 Securit Landlord Di						
Only speak to John Dunne with	calling this client						
Show Alert							
Account Summary			Action Summa	ry			
Debtors A/c	7,396.75	3 Year 10 Month 15 Days O/s	Start Date	06 Jun 3	2010	File Colour	
Outlay A/c	94.63	3 Year 10 Month 15 Days O/s	Solicitor	Martina	Winters	Statute Date	
Outlay Budget	0.00		Case Status		Who	Date	Description
Current Outstanding Fees	6025.00		Last Action		BS	06 Feb 2012	Review File
Client A/c	0.00		Last Milestone	Action		LT. LT. LVAL	
Client Current	0.00		Next Action				
Client Deposit	0.00		Last Record Tin	ne	MW	01 Sep 2011	Client Meeting re issue with planning
Current Locked up value	7,491.38	Percentage of Estimated Fee	cust nector a mi			01 000 2011	circlic meeting re issue man planning
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				De		
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	1:28	367.50					
Letter Drafting	1:10	290.00					
Attendance	0:35	145.00	~ ~		~ .		
Advice	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~	and the second	

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

to ignore the message and remove it from the case.

### **Case Diary Symbols**

Tasks in Yellow denote milestone tasks.											
I2 Dec 2013·         14:53         CN         Contract Stage											
Tasks with a Broken Yellow Box	denote docu	ments processed.	ed.								
Image: O1 Nov 2014         11:36         CN         Searches											

Tasks with a Green Tick denote a completed task.
Second Se
Tasks with a Fixed Date denotes a task that will be completed with the date of generation.
Image: 13 Nov 2015         16:58         BH         Task
Tasks with a Red Dot denote a high priority task.
Image: Second system         27 Oct 2015         10:17         CN         Statute of Limitations Date = 30 Oct 2015
Tasks with S denote a Statute of Limitation date or a critical date action.
Image: Second system         27 Oct 2015         10:17         CN         Statute of Limitations Date =30 Oct 2015
Tasks with a Calendar Symbol denote an appointment.
Image: 2015         14:22         CN         Review PIAB application
Tasks with a Phone Symbol denote a phone call.
🕑 📞 03 Jul 2015 11:19 CN Mike Breeze
Tasks with a yellow note denote a Note.
O1 Nov 2014 11:40 CN Ring Client re. bank statements
Tasks with a hand denote a delegated task.
📃 🍋 01 Nov 2014 11:40 CN Ring Client re. bank statements
Tasks with a blue arrow denote tasks of low importance.
Vertical and the second
Tasks with U denote an Undertaking.
Undertaking Created:
Tasks with an envelope denote an email sent or received.
16 May 2012 11:13 BS Email From:Martina Winters - Mutual Confident
Tasks with a document attached
Ø 03 Jul 2015 14:40 COM Conflict Search
Tasks with an M denote scanned post
14 Aug 2015 14:22 CN Letter Special Damages schedule from PIAB
Tasks with a C denote critical tasks
I 4 Aug 2015 14:22 CN Letter Special Damages schedule from PIAB
Task with a building denote Court Dates
Image: The second sec
Task denotes Non Photo ID
Image: Second system   O2 Nov 2015   17:23   CN   Copy of Electricity Bill
Task denotes Photo ID
Image: Weight with the second secon

# The Case Diary Toolbar

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

Tel: 012902222 F/e: CN

# Navigation within the Case Diary

Case:	FIS001/0001	   	Melinda Fisher
			Sale of Lands in Wicklow

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
a Current Client Details	Current client Details	Click on this to view or edit the current client details.
Surrent 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
🐣 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 particular to this case.
촼 Know Your Client	Know Your Client	Click on this view to see case specific information in a central location.
📓 A/c Ledger	Accounts Ledger	Click on this to view the accounts ledger.
📓 Debt Ledger	Debt Ledger	Click on this to view the debt ledger.
👪 Time Ledger	Time Ledger	Click on this to view the time ledger.
📓 Reserve Ledger	Reserve Ledger	Click on this to view the reserve ledger.
Undertakings	Undertakings	Click on this to view the undertakings on this case.
E 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 "Disallow new Matters".
- Client Contacts Click on **Client Contacts** to add additional client contacts for example the client's spouse or if the client is a company add an employee's details.
- Notes Click on the **Notes Tab** to enter notes relating to the client.

		Curre	ent	Client Details				×
Code BAR00	2			rin Barrett er envelope name				
Corporate	Personal	Legal Details		Billing Details		Permission	Bank Details	
General	Client Contacts	Notes	N	latters	Cr	ross Ref	Categories	
Salutation	Mr Barrett			Main Contact		Enter main contact		
Address	1 High Street			Telephone		01-569 1458		
	Kells Co Meath			Fax No		Enter fax number		
				Mobile		085-654 7896		
E-Mail	kbarrett@gmai	l.com	9	Secondary E-M	1ail	kevinbarrett@hotm	ail.com	
Other ref	Enter other ref			PPS no		Enter PPS number		
Fee earner *	Carol Nolan		~	Spouse PPS		Enter spouse PPS no	umber	
Client VAT no	Enter VAT num	ber		Tax type		Select tax type		~
Postal code	Enter postal co	de		County		Enter county		
DX Address	Enter DX Addre	:55		Nationality	-	Select nationality	_	~
					Т	Disallow new mat	ters	
Anti mone	y laundering checke	d 🗌 Check if th	nis c	ontact is an organisa	atio	n 🗌 Receive mo	onthly statements	
	_			_		_	QK	Cancel

- Matters Click on the Matters tab to view a list of all active matters assigned to this client.
- Cross Reference Click on **Cross Ref tab** to cross reference the client with another for example a husband and wife.
- Categories Click on **Categories tab** to add the client to a category.
- 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
- 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**

Matter

- 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:

Input/Amend any details relating to the matter description.

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

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

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

Client Code		AAA001	Descriptio	n Landlord	Dispute					
Matt	er	0001								
Matter	Admin	Case Associate	Archive	Billing Details	Permission	Transaction	Linked Cases			
Fee Earr	ner	Martina Winters		~	File Ref	Enter Fi	le Ref			
Secretary		Select secretary				Enter				
Partner		Justin Phelan		~		Enter	Enter Enter			
Departr	ment	Litigation		~		Enter				
Work T	ype	Action		~		Mark	Statement			
Old Ref	erence	Enter old refere	nce		Branch	Select b	Select branch			
Case P	Plan & Sta	tus								
Case	Plan/Type	General Office V	Vork	~	File Colour	Select fi	le colour	▼ Clear		
Case	Status	Select case state	JS	~	Record No	Enter re	Enter record no			
ile Numb	er: 180							OK Cano		

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

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

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

	Estimate of Fees	Check the box if an estimate of fees has been given.		
	Comments	Input any comments.		
	Charge Rate Level:	Using the option buttons, select a charge rate level		
	Effectively complete	Tick if the case is effectively complete 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>/erride</b> button to apply it to future documents generated.		
Other Details		ails tab to view a list of user variables eg. Purchase price, c. either already added to the case or due to be added.		
	Tip: To amend the user variables click on Extra Case Details on the Navigation panel.			

	Note these variables are individual to each case plan type and case.
Archive	Remove the <b>tick</b> to reopen a previous archived file.
Billing Details	Click on the <b>Billing Details tab</b> to add information on the billing of this matter.
	For Debt cases input the charge arrangements, the debt amount collected, and the total debt amount collected.
	Using the option buttons, select the billing type and default billing method.
Permissions	Click on the <b>Permissions tab</b> to control access to this matter, for example to add or remove particular user groups.
Transaction	Click on <b>Defendan</b> t or <b>Client</b> tab. Then click on the <b>Post Button</b> to add a transaction. Click on the <b>Change Button</b> to amend an existing transaction.
	Note the balance will automatically update.
Linked Cases	Click on the Linked Cases tab to link two or more cases together.

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

### Inserting a Statute of Limitations Date

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

٦				Current	Cas	e Details				×
Client Matte		FLY001	Description S	ale of Ho	ouse	at: 4 The Mews	, Rathfarnham,	Dublin 6		
Matter	Admin	Additional Details	Case Associate	Archi	ve	Billing Details	Permission	Linked Cases		
Value To	Client	Enter value to cl	ent		E	stimated Fees	5000.00		Fixed Fee	×
Started D Statute D		02 Jul 2015 28 Jul 2017		۷ ۷	Ð	cp. Bill Date	25 Sep 2016			~
Deposit I		Enter deposit na	me				Section 13			_
Outlay B	-	150.00			T	/pe	Select depos	it types		~
	commen	ts						Effective		
File Numbe	er:361								<u>o</u> k	<u>C</u> ancel

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.

se: A	AA00	01/0001		( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( )	AAA Secu	rities Ltd		Те	l: 0121
					Landlord	Dispute		F/e	e: MW
								Ignore	Show
RNIN	NG : 1	No activ	vity on	n this file in over	21 months.			Ignore	Show
5	Sea	arch						Standard V	iew 🗌
C	. A	P D	A	Date	Time	Handler	Synopsis	Action Co.	F
~	\$			21 Feb 2014	17:00	BS	AAA Securities Ltd	PHE	100
•		1		06 Feb 2012	10:50	BS	Review File	G16	P
•				01 Feb 2012	17:43	BS	Invoice No:225	DB01	P
•				18 Jan 2012	11:13	BS	Invoice No.220	DB01	P
	C			29 Nov 2011	17:04	BS	Phone Call	PHE	P

All 'Statute of Limitation Dates' can be clearly identified by the Statute of Limitation symbol. (5). See the following example.

### **Case Associates**

### What are Case Associates?

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

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

1. Open a case in the Case Diary.

Home Case Reports	s Phone Log M	laintain Setup Help	Keyhouse Case Man	agement (CN - Carol N	olan - 00:05 / 00:00 )				<u>_</u>	
Professional Print										
Client/Case	Case: ABA001/00	01 🔹 🕨 🔤 David Abrahams								Tel: 01-29
Case Diary		Family Law								F/e: AM
Document Manager	Search									Standard View
urrent Client Details	Type	Name/Company	Address	Phone	Solicitors Ref	Email	Case Code	Mobile	Assigned Contact Name	
Current Case Details Other Case Details	<ul> <li>Barristers</li> </ul>		The Law Library, Dublin 8.	01-8788888		f.edwards@lawlibra	ABA001/0001	087-7666666		
issociates	Other Part	ty Paul Smith (Paul Smith)	33 Green Park Dundrum	016755555		psmith@gmail.com	ABA001/0001			
now Your Client	Solicitors	Allsop & Browne (Allsop & Bro	2 Baggott Street Dublin 2.	01 6655777		info@allsopbrowne	ABA001/0001			
rong Room										
	Contact Deta	ils			Main Contacts	Details (if applicable)				
	Name	Frank Edwards			Name					
		Frank Edwards BL			4.44					
	Company	Frank Edwards BL The Law Library, Dublin 8.			Address					
Tasks	Company Address	The Law Library, Dublin 8.			Phone					
Tasks Search/Open	Company Address Phone	The Law Library, Dublin 8. 01-6788888			Phone Mobile					
Tasks Search/Open Client/Case	Company Address Phone Mobile	The Law Library, Dublin 8.			Phone					

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

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

2.

		Add	Case Associate Professional				đ >
Action							
👻 🖕 🖊 🗶 😸							
mport Export Add Edit Delete Print							
Contact Associate Print Associate Type	Associates						
ssociate Type							_
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	í
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	000003	Duomin	Circuit Court Onice, was or onanaign, mits causy, output 7.			circourts	
Attorney	000004	Dublin	Dolphin House, East Essex Street, Dublin 2.			DisCourts	
Auctioneers	000005	Eagle Star (Eagle Star)	Blackrock Co. Dublin			ClientInsur	
Banks	000005	Dun Laoghaire Rathdown County Cou	Civic Officer Dup Leophaire Co. Dublin	205 88888		LocalAuthori	
Barristers		but begrate national county cours	-	200 00000		Cocastantin	
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 NEETIN	Walkinstown Road, Walkinstown, Dubin 12	4300033		JUNCTOTS	
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			A Stand D - Low Brids & Alexandrow				and the second second

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

		Add Case A	ssociate Professional					
Action								
Import Export Add Edit Delete Print								
Associate Type	Associat	tes						
sol	Search						Standard V	iew
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		
~		0 · 0 • 1 /0						
					Ac	ld bi	Add and Close	Close

- 4. Click in the **Search box** and **input** part of the solicitor's name; the search will be applied as you type.
- 5. Select the solicitor required and click **Add**. Once all the associates are attached, click **Close**.

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

#### How to add a New Case Associate to a Case

- 1. Open a case in the Case Diary.
- 2. Click on Associates on the Navigation panel
- 3. Click on **Add Professional** on the Home tab of the Ribbon.
- Click on the Category of case associate you want to add e.g. Bank.
- 5. Alternatively, click in the **search box** and **input** a key search word the search criteria will be applied as you type.
- 6. If no record is found then add a new record.
- 7. Then click on the **green plus** 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 ie. Mr, Mrs etc.
- Address: Input the address
- **Code:** Input a Code for this contact e.g. JAC001 for Jackson. If you leave the code blank the system will assign a numeric code.
- Phone No: Input the main phone number
- **Fax No:** Input the fax number
- Home: Input home phone number
- Mobile: Input mobile phone number
- E-Mail: Input e-mail address



Details									
Type *	Banks				× (	ode *	NIB001		
Full name	e* National	Irish Bank			P	hone no	0166775	544	
First nam	National	Irish			F	ax no	Please e	nter fax number	
Surname	Bank				- F	lome	Please e	nter home number	
Salutatio	n Sir				N	dobile no	Please e	nter mobile number	
Company	National	Irish Bank			E	-Mail	info@nil	o.ie	
Title					DX ref	Pleae en	ter DX ref		
	6 Main Street Dublin 2		0	County	Please e	nter county			
Address	Dubiin 2				P	ostal Code	Please e	nter postal code	
Search				New	Edit Delete				
Relation	nship	Name	P	hone	Email			Address	

DX Ref:Input the Document Exchange reference if applicableNominated:Tick is this is the nominated contact.County:Input the county.Post Code:Input the post code.

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

## Input the following details as required:

- Name Address, Salutation Title Email Relationship to the associate, Phone number Fax number Mobile number Notes
- 10. Click **OK** to save. You will return then to the **Add Case Associate** window. The contact will then appear at the bottom of the window see the following example.
- 11. Click **OK** to save the new record. A message will appear stating the contact has been added successfully.



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

## How to amend a Case Associates Details

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

		Ad	d Asso	ciate Cont	tact				×
Associate Code	AIB002					ID	8		
Name: *									
Deirdre Nolan									
Address: *									
AIB Sutton Cross Dublin 13									
Salutation	Deirdre			Phone:	01-8	3955645			
Title:	Ms			Fax:	01-8	3955624			
E-Mail:	DeirdreNolan	@aib.ie		Mobile:	087	-963211			
Relationship:	Manager		_						
Note: Manager of Sutt									
							0	k	Cancel
<b>î</b> )		l	Jodate C	ase Associate					×
General Other details	Other types Note				ails				Ŷ
Details									
Type * Banks			~	Code *	NIB001				
Full name* Nationa				Phone no	016677554				
First name Nationa	ii irish			Fax no Home		er fax number er home number			_
Salutation Sir				Mobile no		er mobile number			-
	l Irish Bank			E-Mail	info@nib.i				
Title Please e	enter title			DX ref	Pleae ente	r DX ref			
6 Main Dublin 2				County	Please ente				
Address	1			Postal Code	Please ente	er postal code			_
		New Edi	×						
Search				2					
Relationship	Name	Phone	Email			Address National Irch Ran	k		~
Manager				©nib.ie		National Irsh Ban 6 Main Street Dublin 2			
						Dubiin 2			
								<u>O</u> k	Cancel
		Ado	Case Asso	ciate Profession	al				<b>-</b> ×
Action									^
import Export Add Edit	Delete Print Party Print Labels								
Contact Associ	ate Print								
Associate Type		ociates							Standard View
bank	0	ode Name/Compa	any A	ddress		Phone No Category	Type	Notes	Standard View
Associate Type  Banks				Main Street Kilke			Lendinst		^
ACCBank Branch		IB011 AIB (AIB)		Main Street, Bray			Banks		
		IB001 National Irish		Main Street Dubi		016677	Banks		

- 3. If the Associate is assigned to the case **Double Click** to **amend**.
- 4. Otherwise click on **Add Professional** on the Home tab of the Ribbon.

2.

- 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** dialogue box will appear.
- 8. Click on each *tab* and amend the details as required.

		Full Name* John Dunne			P	hone No	6773591				
		First Name Enter First Na	ne		B	ax No	6790390				
General	Click on the	Surname Enter Surnam	2		н	lome	Please Enter H	Iome Number			
General	CIICK OIT LITE	Salutation Mr. Dunne			N	Aobile No	Please Enter M	1obile Number			
	General tab	Company John Dunne				-Mail	Please Enter E-	-Mail Id			
	General tab	Title Please Enter T Olympia Hous				DX Ref	DX 203003				
	to amend	Address Oublin 2.				County Postal Code					
	details such				0						
	as name,	Search		New	Edit Delete						
	address etc.	Relationship Nar	ne	Phone	Email		Ad	ldress		^	
	dualess etc.										
Details	Click on the									~	
	Details tab										
	Details tub								Ok	Cancel	]
	to add 🛛 🗖										
	personal informa	ation suc	h as	date	of bir	rth,	occu	pation	etc.		
Other Types	Click on the <b>Othe</b> any other catego		tabs	to se	e if t	his a	assoc	iate is	a me	embe	er of
Other Details (optional)	Click on the <b>Othe</b>	er Detail	s tab	to ac	dd a s	speo	cific c	ourt a	nd co	ourt	date.
Notes	Click on the <b>Note</b> associate.	e <b>s tab</b> to	add	addit	ional	l no	tes al	bout tł	ne ca	se	
Other Case Involvements	Click on the <b>Othe</b> case associate is				nts to	ab t	o vie	w a list	t of c	ases	this

Details

Other Details Other Types Notes Other Case Involvements

Code \* DUN011

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

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

- 1. Open a case in the Case Diary.
- 2. Click on Associates on the Navigation panel.
- 3. Right Click on the Associate to be removed. The following menu will appear.

	Edit		
8	Delete		
	Export To	•	

🔊 Add

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

<b>(</b>					Edit Case	e Associate						>
General	Associate Contac	t Details	Other details	Other Types	Notes	Other Case Involvements	Bank Details	Sequ	ence	1		
Search	1						-	/ Edit	X Delete	<b>V</b> Assign	<b>O</b> Unassign	
Relati	ionship Name		Phone	Email		Address						
			A							20.		

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.

		Add Associate Conta	ct		×
Associate code	BLO001		ID	13	
Name *					
Enter name					
Address					
Enter address					
Salutation	Enter salutation	Phone	Enter phone nur	nber	
Title	Please enter title	Fax	Enter fax numbe	r	
E-Mail	Enter email ID	Mobile	Enter mobile nur	mber	
Relationship	Enter relationship				
Note					
Enter note					
				Ok Ca	ncel

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

R

## **Print Options**

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



Print Label

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

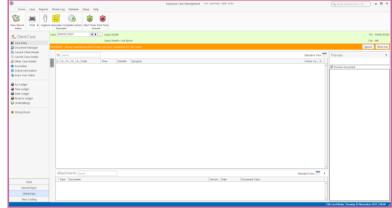
Select a Case Associate and then click Print Label.

## **Generating Tasks**

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

## How to Generate a Task

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



showing the case plan see the section on configuring the case diary screen.

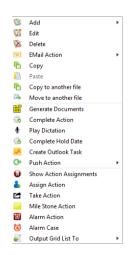
4. Generate the Task using one of the following methods:

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

- Method 2: If the task is already in the case diary
  - 1) Click on the task to select it.
  - 2) Click on **Generate** on the case diary toolbar.

#### Or

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



#### Keyhouse

## **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**: All document associated with a completed action will be Read Only.

## 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

Drag to case diary to insert action

3. Click OK.

2.

## **Changing Tasks**

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

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

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

Case Diary		Action	change Action ( 5070 )	- *
	red option. Click "Open Document" to open the document for this action or click "Open open the action details.	Gopen Attachment     Play Dictation     Play Dictation     Play Attachment	mplate) Priority Assignment	
Do not show again and rememb	er the last choice I made	General Properties Attachment/Documents	Action Assignments Other Notes	
	Open Document Open Action Details	Action Status NA	Not Applicable	
		Flag Clear Flag 🔍	Priority	Category
Amend the fo	llowing details as required	Vuoisin     None     Publish Only     Eport Only     All	Honry High ● Normal Low	Category  e Action  Fixed Dated Action  Note  Appointment  Reminder  Email
a On the <b>C</b>	eneral Tab amend the following		Other Properties	O Phone Message
details:		Publish Status Communication Sent	Milestone Complete Billable Documents Processed Know Your Client	Undertaking Statute Date Critical Date Scanned Post/Mail
Case	This will default to the current case; to change			Cheque Request Photo ID Non Photo ID Ok Cancel

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.

			Change Action ( 3076 )	- ×
Publish	This applies only to data that is published to an		Priority Assignment Action Assignments Other Notes	
	external source. Using the option buttons <b>set</b> as required.	Action Status   NA       Flag   Clear Flag       Publich Publich Coly Export Only All	Not Applicable	Category  Action  Fixed Dated Action  Note  Appointment  Reminder  Final  Phone Message  Diction
Publish Status	This applies only to data that is published to an	- Publich Status -	Muestone     Complete     Diabable     Decuments Processed     Know Your Client	Undertakling Statute Date Critical Date Control Table Scanned Port/Mail Create ReportMail Produe ReportMail Produe ID Non Photo ID
	external source. A <b>tick</b> will appear stating a communica	tion has been sent.		Ok Cancel

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

Outstant         Complete         Final         None         Automation         Production	C	ite Document	Post Time Note	1 High	PT Take A	ation	-	attachment	📫 Delete Attachment 📔 Paste	Save	
Pagy Dictation         aik Netr         Simult (temptate)         Low (Northy         Assignment         Catachment & Copy (add)         Assignment           Internet/Dictorum         Action         Common Ministry         Assignment         Astachment & Copy (add)         Astachment / Common Ministry           Internet/Dictorum         Action         Ministry         Common Ministry         Astachment / Common Ministry           Internet/Dictorum         Action         Ministry         Tele Path         Astachment / Common Ministry           Internet/Dictorum         Action         Ministry         Tele Path         Astachment / Common Ministry         Astachment / Common Ministry           Internet/Dictorum         Astachment / Common Ministry         Tele Path         Astachment / Common Ministry         Astachment / Common Ministry           Internet/Dictorum         Astachment / Common Ministry         Tele Path         Astachment / Common Ministry         Astachment / Common Ministry           Internet/Dictorum         Tele Path         Common / Tele Path         Astachment / Stachment / Stachme					-		_			-	
Default Actions         Assignment         Astudment           earnell         Peopetries         Attachment/Locournets         Action Assignments         Other Textes           Other Enters         Other Enters         Content         Content         Content         Content           Image: Content         Conten         Cont					Assign		_				
Properties         Attachment/Documents         Action Assignments         Other Notes           ID Bits Entered         Document         Version         Occ:Class         Track Set // Bits Bits           ID Bits Documents         Version         Occ:Class         Track Set // Bits Bits         Fib Problem           ID Bits DOSI         Settlered to Minusers Company         1         Company         Settlered Documents/BLADDPDODUstrier Bits           ID Bits 2015         Lettler to Minusers Company         1         Lettlere/L         2555         Fib/sphore/Enter documents/BLADDPDODUstrier to L           ID Bits 2015         Lettler to Minusers Company         1         Lettlere/L         2555         Fib/sphore/Enter documents/BLADDPDODUstrier to L           ID Bits 2015         Lettler to Minusers Company         1         Comep.         2501         Exphore/Enter documents/BLADDPDODUstrier to L           ID Bits 2015         Lettler forming/Clice after fins.         1         Client L         2505         Exphore/Aided documents/BLADDPDODUSDPDOTUSTer int.           ID Bits 2015         O'Tyme Letter to Defendants         1         Letter/L         2534         Exphore/Aided documents/BLADDPDODPDOTUSTer Int.           ID Bits 2015         O'Tyme Letter to Defendants         1         Letter/L         2534         Exphore/Aided documents/BLADDPDODPDOTUSTer Int	Play Di						M B	dit Attachment			
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El 30 Nov 2013                Zills                Zills                  Zills             Nov 2013             Letter to Dardia             1 Corresp.             Zills             Nay Phonoscient document(E)LAD0/D001/Letter to             Loss             Zills             Nay Phonoscient             Construction             Loss             Zills             Nay Phonoscient             Construction             Loss             Zills             Nay Phonoscient             Construction             Zills             Nay Phonoscient             Construction             Zills             Nay Phonoscient             Construction             Zills             Nay	1	03 Nov 2015	Letter to Witness Witnesses 2		Corresp	2	640	t\keyhouse\cli	ent documents\BLA001\0001\Lette	n to	
■         0 Story 2015         Letter to Cardial         1 Corresp.         2507         Tylephonet(Selder documents)ELAD007001/Letter to           ■         0 Story 2015         Letter to Witness         1 Corresp.         2684         Stylephonet(Selder documents)ELAD070071/Letter to           ■         0 Story 2015         Letter to Otheritation         1 Clent La.         2815         Stylephonet(Selder documents)ELAD07000171/Letter int           ■         0 Story 2015         Oftyme Letter to Definiciants         1 Letter/L.         2815         Stylephonet(Selder documents)ELAD070001075/tyme L           ■         0 Story 2015         Oftyme Letter to Definiciants         1 Letter/L         2814         Stylephonet(Selder documents)ELAD070001075/tyme L	12	03 Nov 2015	Letter to Insurance Company	1	Letters/I	2	639	t\keyhouse\cli	ent documents\BLA001\0001\Lette	er to I	
10 Nov 2015             Letter in Wilness             1 Corresp.             2636 t1/keyhouse/client documents/BL40010001/Letter to             2635 t5/keyhouse/client documents/BL40010001/Letter inf             2635 t5/keyhouse/client documents/BL40010001/Diffyret L             2635 t5/keyhouse/client documents/BL4001001/Diffyret L             2635 t5/keyhouse/client documents/BL40010001/L400100100100100100100100100100010001000	1	03 Nov 2015	Letter to Engineer	1	Corresp	2	638	t\keyhouse\cli	ent documents\BLA001\0001\Lette	er to	
III         0.1 Nov 2015         Letter informing Client after firs         1         Client Le         2655         Skayhouser,client document/alLA001;0001;uciter inf           IIII         0.1 Nov 2015         O'Byrne Letter to Defenduets         1         Lietter,/L         2634         Liethorouser,dient document/alLA001;0001;Uciter inf           IIIII         0.1 Nov 2015         Ubergenut         Lietter,/L         2634         Liethorouser,dient document/alLA001;0001;Warning           IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	12	03 Nov 2015	Letter to Gardai	1	Corresp	2	637	t\keyhouse\cli	ent documents\BLA001\0001\Lette	er to	
10             10 Nov 2015             0'9Tyme Letter to Defendants             1             Letters/L             2634             t/skeyhouselclient documents/BLA001/001/0/Tyme L              Varning Letter to Defendant             1             Letters/L             2633             t/keyhouselclient documents/BLA001/001/0/Tyme L	18	03 Nov 2015	Letter to Witness	1	Corresp	2	636	t\keyhouse\cli	ent documents\BLA001\0001\Lette	ar to	
🔞 03 Nov 2015 Warning Letter to Defendant 1 Letters/L. 2633 t\keyhouse\client documents\8LA001\0001\Warning	18	03 Nov 2015	Letter informing Client after firs	u 1	Client Le	2	635	t:\keyhouse\cli	ent documents\BLA001\0001\Lette	er inf	
	18	03 Nov 2015	O'Byrne Letter to Defendants	1	Letters/I	2	634	t\keyhouse\cli	ent documents\BLA001\0001\0'By	me L	
O Nov 2015 Letter to Doctor requesting Me 1   Corresp 2362   tylkeyhouse,client documents/JLADD10001/Jutter to											
	18	03 Nov 2015	Letter to Doctor requesting Me	1	Corresp	2	632	t\keyhouse\cli	ent documents\BLA001\0001\Lette	er to	
		0310012013	Letter to boccor requesting me		Contraption			c (keynouse (ca		17 Billion	

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

	Туре	V	Document Name	Diary Date	Version	Date 💌	Document Class	Source
×	12		Letter to Witness Witnesses 2	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
			Letter to Insurance Company	03 Nov 2015	1	03 Nov 2015	Letters/Interparty Corr	Case
			Letter to Engineer	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
	R		Letter to Gardai	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
			Letter to Witness	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
	R		Letter informing Client after first consultation	03 Nov 2015	1	03 Nov 2015	Client Letters	Case
			O'Byrne Letter to Defendants	03 Nov 2015	1	03 Nov 2015	Letters/Interparty Corr	Case
			Warning Letter to Defendant	03 Nov 2015	1	03 Nov 2015	Letters/Interparty Corr	Case
			Letter to Doctor requesting Medical Report	03 Nov 2015	1	03 Nov 2015	Correspondance	Case

#### **Open an attachment**

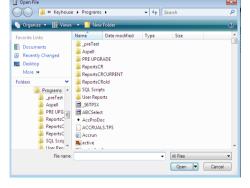
- i. **Double Click** on the attachment you want to open.
- ii. Or Click on Open Attachment
- iii. The Word Document will then open in Word to edit, print etc.

#### Add an attachment to a task

appear.

ii.

- i. Click to the Attachment/ Documents Tab
- Attachment/Documents
- Click on the Attachment option. Attachment The following dialogue box will



- iii. **Browse** and locate the required document.
- iv. Click **OK**. The document will now appear the attachment list.

#### Amend an attachments properties

i. Select the document you want to amend.

ii. Click on the edit attachment

	Document Properties	)
Details File Inform	ation	
Document Name:	Letter to Lending Institution	
Document Date:	04 Nov 2014	
Document Class:	Letters/Interparty Correspondance	~
Document Type:	Document	
Ē	Ok Cancel	

Edit Attachment

located on the toolbar. The following dialogue box will appear.

iii. Amend the following details as required

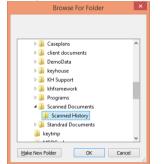
Document Name Click in the **input box** and amend as required.

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

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

## Link to Folder

- i. Click to the Attachment/ Documents Tab
- ii. Click on the Link to Folder button
- iii. Navigate to the folder you want to attach



#### iv. Click OK

		Change Act	ion ( 30	)29)					- ×
Action Generate Document  Post Time  Note	t High	📑 Take Ac	tion	Ma A	ttachment	📫 Delete Attachment	📔 Paste	📽 Save	
🎦 Open Attachment 🛛 🖌 Complete 😒 Email	Normal	👗 Assign A	lction	ti 🖓 Li	ink to Folder	🚜 Precedent	<ol> <li>History</li> </ol>		
🕏 Play Dictation 🛛 🗯 Print 🔗 Email (Template)	- Low			🕉 B	dit Attachment	Pa Copy			
Default Actions	Priority	Assignm	ent			Attachment			
General Properties Attachment/Documents Action	Assignments	Other No	tes						
Date Entered Document	Version	Doc Class	Track R	lef	File Path				
07 Sep 2015 New sign-in from Chrome on	1	General	2	599	t\keyhouse\clii	ent documents\BLA001	\0001\New	sign	^
📔 07 Sep 2015 keyhole	1	General	2	600	t\keyhouse\clie	ent documents\BLA001	\0001\keyh	ole_2	
07 Sep 2015 profilephoto	1	General	2	601	t\keyhouse\clii	ent documents\BLA001	\0001\profil	eph	
📔 07 Sep 2015 google_logo	1	General	2	602	t\keyhouse\clie	ent documents\/BLA001	\0001\goog	le_lo	
07 Sep 2015 windows	1	General	2	603	t\keyhouse\clii	ent documents\BLA001	\0001\wind	ows	
👔 07 Sep 2015 down_arrow		General				ent documents\BLA001			
03 Nov 2015 Link Folder T:\keyhouse\Scanne					T:\keyhouse\Sc				
								O	cancel

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

#### **Delete an attachment**

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

#### **Copy and Paste an attachment**

- i. Select the attachment you want to copy.
- ii. Click on Copy
- iii. Open the task you want to **Paste** the document in. Click on the Attachment/Documents Tab.
- iv. Click Paste Paste. The following attachment properties box will appear.
- v. Amend the details as required and OK to confirm.
- vi. A **message** will appear asking you to confirm the update, click **Yes** to confirm
- vii. A copy of the document will then appear in the document list.
- d. Click on the **Action Assignments tab** to show the assignment history of the task. See the section on Assigning Tasks for further information.
- e. Click on the **Other Notes tab**; the following screen will appear. Input any notes you may have on the task.
- 3. Click **OK** to save any changes made.

## **Deleting a Task**

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

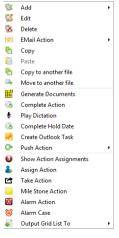
#### **Copying a Task**

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

	Document Properties	×
Details File Informa	ation	
Document Name:	Letter to Lending Institution2	
Document Date:	04 Nov 2014	
Document Class:	Letters/Interparty Correspondance	~
Document Type:	Document	
r <u>è</u>	Ok Cancel	

								Chang	e Action ( 97	B)						-
Action																
Geni	erate Document	Post	t Time 📒 t	lote		1 H	gh	🖻 Tak	e Action	😰 Save						
oper	n Attachment	<b>√</b> Con	nplete 🔶 E	mail		N	ormal	🕹 Ass	ign Action							
Play	Dictation	Jail Prin	t 🗢 E	imail (Terr	plate)	- Lo	w	🕹 Del	ete Assignme	nts						
	De	fault Ac	tions			Pric	rity	4	ssignment							
General Properties Attachment/Documents Action Assig					Assign	ments	Othe	r Notes								
	ву		Action	For			Date Assign	red	Time Assigned	Date Returned	Time Returned	Assigned By	Returned By	Delegate	Team	A
> 🗸	Brian Sweeney	(BS)		Brian Sw	ieeney()	8S)			10:05						сом	1
-	Brian Sweeney	(BS)	Processed	Brian Sw	eeney()	BS)	21 Jan	2014	14:34		23:59	BS	BS	BS	COM	
-	Brian Sweeney	(BS)	Complet	Brian Sw	eeney()	BS)	18 Jan	2012	11:10	31 Jan 2012	09:37	BS		BS	COM	
-	Brian Sweeney	(BS)	Complet	Brian Sw	eeney(i	BS)	06 Ma	y 2011	11:10		23:59	BS	BS	BS	UT	
-	Brian Sweeney	(BS)	Processed	Brian Sw	eeney()	BS)	06 Ma	y 2011	11:10		23:59	BS	BS	BS	COM	
	Brian Sweenev	(BS)	Created	Brian Sw	eenev()	BS)	04 Ma	r 2015	10:11	06 May 2011	11:10	85		BS	UT	





2. Click on Copy

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

#### Copying a Task to another matter

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

#### Moving a Task to another matter

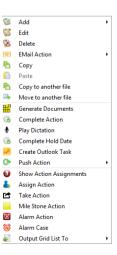
- 1. Right Click on the task in the case diary: the menu above will appear.
- 2. Click on **Move To**
- 3. A list of cases will appear search for the required case.
- 4. Then **Double click** to select.
  - Note: You will automatically move to the case diary of the case selected.

## ${}^{\rlapagentum{W}}$ TIP: TO DELETE, MOVE OR COPY MULTIPLE TASKS :

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

#### Assigning a Task to Another Handler

- 1. Right click on a task the following menu will appear
- 2. Click on Assign Action.
- 3. A screen will appear listing all resources.
- 4. Double Click on the **resource** person you want to assign the task.
- Check the Release Action box to remove the task completely from your task list.
   Alternatively to continue to own the task leave the Release Action box checked.



- Note The owner of the task is the only person who can mark the task as complete. This allows you to assign a task to another handler but ensures you have control over the task.
- 6. You will return to the **action assignment** window.
- 7. Click **OK** to save the changes.

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

## 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.

<b>1</b>										Keyhouse Case Management (CN - Carol Nolan - 00:00 / 07:30)	
Home Case Repo	orts P	hone	e Lo	9	Main	tain	Setup Help				
New Item • Print • Cap	D pture G		ate (		plete	Actio	n Start Timer Po Accounts				
Client/Case	Ca	se:	BLAO	01/0	0001		<h.< td=""><td>. Gordon T</td><td>. Black</td><td></td></h.<>	. Gordon T	. Black		
								RTA Walk	instown Cro	ssroads, G. Black	
💾 Case Diary											
じ Document Manager	w.	AKNI	NG	: Inv	DICES	outsi	anding over 3 Ye	ars 6 Months	s 1 Days .		
Social Client Details		8	s	earch							
Current Case Details	20							1			
Other Case Details	Action	C.			D	A		Time	Handler	Synopsis	
Associates		١.,	6				15 Mar 2015	17:00	BS	Statute of Limitations Date = 25/03/2015	
Oritical Information						!		13 Mar 2015	17:17	BS	Review File
촼 Know Your Client		E	£			Ű.	04 Mar 2015	10:11	CN	Prepare Papers for Counsel.	
			6				28 Oct 2015	11:51	CN	provide proof of ID	
A/c Ledger			5			8	07 Sep 2015	15:33	CN	Email From:no-reply@accounts.google.com - New sign-in from Chrome on Win	
Time Ledger		•	4			8	07 Sep 2015	15:29	CN	Email To:Shaun Dwyer - [BLA001/0001] Gordon T. Black	
📓 Debt Ledger 📔 Reserve Ledger			5				01 Sep 2015	12:15	CN	Letter to Client ?	
-			1			8	04 Aug 2015	12:35	CN	Email To: training.keyhouse.ie@gmail.co - Test Email	
Undertakings			4			8	04 Aug 2015	12:31	CN	Email To:Brenda Hartley - [BLA001/0001] Gordon T. Black	
Strong Room						8	28 Jul 2015	15:05	CN	Email To: - [BLA001/0001] Gordon T. Black	
strong toolin						8	03 Mar 2015	17:23	BS	test	
						8	03 Mar 2015	17:17	BS	Letter to Client	
			4			8	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 above of a search for "draft".
- 5. Click **cancel** to reset.
  - Tip to refresh the Case Diary click on refresh tool located next to the search box on the search bar.

## How to sort and filter the Case Diary Columns

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

## How to filter Case Diary Columns

- 1. Open a case in the Case Diary.
- 2. Move your mouse to the required column heading.
- 3. To view a list of filter categories Handler Click on the pin and select the required category. See the following example.

## How to view all documents on a case

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

Home Case Repor	rts Phone Lo	og Maintain Setup Hele			Key	house Case Management	( CN - Carol Nolan -	00:01 / 07:29)				Quick Search (Ctrl + Q)	□
Vew Item - Print Expo	ort to PDF St	art Timer Post Time Accounts Properties Reclassify Document(i)	M 🚺 👘	Use Adobe P Preview		MS Word Workshare							
Client/Case	Case: BLA		n T. Black (alkinstown Crossroads, (	3. Black									Tel: 01 476 F/e: BS
Document Manager	Search	😔 🗌 Search	n text								Standard View 🔲	Letter to Client	
Current Client Details	Type	Document Name	Diary Date	Date .	Version	Document Class	Source	From	То	Subject	File		
Current Case Details	• B	Letter to Client	12 Feb 2016	12 Feb 2016		1 Client Letters	Case			Letter to Client	t:\k	BLA001/0001/	BS/AM
Extra Case Details Associates	6	Letter to Client	12 Feb 2016	12 Feb 2016		1 Client Letters	Case			Letter to Client	t:\k		
Critical Information	E	Attendance Sheet	12 Feb 2016	12 Feb 2016		1 Instruction Sheets	Case			Initial Attendance	t:\k	12 February 20	)16
Know Your Client	<b>B</b>	Letter to Client	12 Feb 2016	12 Feb 2016		1 Client Letters	Case			Letter to Client	t:\k		
A/c Ledger	··· 😥	Letter to Client	12 Feb 2016	12 Feb 2016		1 Client Letters	Case			Letter to Client	t:\k	Gordon T. Black	
Time Ledger	<b>R</b>	Letter to Client	12 Feb 2016	12 Feb 2016		1 Client Letters	Case			Letter to Client	t:\k	23 Ellis Park	
Debt Ledger	1	Letter to Client	12 Feb 2016	12 Feb 2016		1 Client Letters	Case			Letter to Client	t:\k	Rathmines Dublin 6	
Reserve Ledger	<b>R</b>	Letter to Client	12 Feb 2016	12 Feb 2016		1 Client Letters	Case			Letter to Client	t:\k	Duban o	
Undertakings		down_arrow	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		
Strong Room		windows	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		
-		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		

andle	r 🕈 👻 Swe	opsis
JP	(Blanks) (Non blanks)	oice No:2
CN	ADM	ation
BS	BS	al Letters,
BS	CN	flict Sear
BS	JP	se Letters
BS	Cha	se Letter
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	$\sim$	$\sim\sim\sim$

## 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 Walkinstow	n Crossroads G	Black						
pleading	gs 🔄 🖂 Search text								Standard View
Type 🖉	Document Name	Diary Date	Version	Date 💌	Document Class	Source	From	То	Subject
+ 👔	blac01-0001	16 Jan 2014	1	21 Jan 2014	Correspondance	Sent E-mail	brian@keyho	brian@keyho	Draft Pleadings from Counsel
🔁 I	Draft Pleadings from Counsel	16 Jan 2014	1	21 Jan 2014	Correspondance	Sent E-mail	brian@keyho	brian@keyho	Draft Pleadings from Counsel
	Draft Civil Bill	22 Nov 2011	1	22 Nov 2011	Pleadings	Received E-m			Draft Pleadings
S 1	Draft Pleadings	22 Nov 2011	1	22 Nov 2011	Correspondance	Received E-m			Draft Pleadings
	Special Damages	09 Dec 2010	1	19 Oct 2011	Pleadings	Case			Ask Client to call to sign Application form PIA
	PIAB Application Form - 1 Defendant	09 Dec 2010	1	19 Oct 2011	Pleadings	Case			Ask Client to call to sign Application form PIA
1	Civil Bill (CC) RTA_132	10 Nov 2010	1	10 Nov 2010	Pleadings	Received E-m	Brian Sweeney	brian@keyho	Draft Civil Bill
	Type         ∅           Image: transmission of tra	Image: Spleadings     Image: Spleadings       Type ()     Document Name       Image: Spleadings     Image: Spleadings       Image: Spleadings     Image: Spleadings	Pleadings         Search text           Type #         Document Name         Diary Date           Image: Diary Date         Biac01-0001         16 Jan 2014           Image: Diary Date         Biac01-0001         16 Jan 2014           Image: Diary Date         Biac01-0001         16 Jan 2014           Image: Diary Date         Diary Date         16 Jan 2014           Image: Diary Date         Diary Date         16 Jan 2014           Image: Diary Date         Diary Date         20 Nov 2011           Image: Diary Date         Diary Date         Diary Date           Image: Diary Date         Diary Date         Diary Date <td>Type         U         Document Name         Diary Date         Version           Image: State State</td> <td>Image: Constraint of the second sec</td> <td>Image: Constraint of the second sec</td> <td>Pieadings         Search text           Type         Ø         Document Name         Diary Date         Version         Date         Document Class         Source           Image: Imag</td> <td>Image: Spear of the state       Image: Spear of the state       Image:</td> <td>Image: Control of the second secon</td>	Type         U         Document Name         Diary Date         Version           Image: State	Image: Constraint of the second sec	Image: Constraint of the second sec	Pieadings         Search text           Type         Ø         Document Name         Diary Date         Version         Date         Document Class         Source           Image: Imag	Image: Spear of the state       Image:	Image: Control of the second secon

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

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

## **Processing Documents**

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

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

What type of information is requested when processing documents?

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

Go Clear

N

## Select Documents to be processed

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

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

## Naming and classifying a Document

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

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

14 4	4 4 ? <b>)  )  </b>	•		•
Ta	g/UnTag		Cancel	<u>0</u> k

Matter:	BLA001/0001 Gordon T. Black	
	RTA Walkinstown Crossroads, G. Black	
Document	Jame: Letter to Client ?	Ok Cano
Document	cetter to enert.	

- 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.

△ Document Selection

Search

V

AUCLT

Tag document for processing

Letter to Auctioneer?

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

#### Adding Case Associates when generating a document

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

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

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

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

🛆 Se	elect Case A	ssociates			×								
-	• •	🔺 🗕 Solicitors		Matter: BLA	4001/0001								
Sel	ect the S	olicitors to be copied with	n this document?	his document?									
	Seq	Name	Company	Address	Туре								
	1	Allsop & Browne	Allsop & Brown	e 2 Baggott StreetDublin 2.	Solicitors								
	2	Edward Dunne & Co.	Edward Dunne	& Co. 1 Main StreetLaraghCo.Wicklo	w Solicitors								
•	6												
	Tag A	l UnTag All UnTag	Invert Filter On		Continue								

- 2. There is two solicitors assigned to this case you can tag the solicitor provided then click on the amend button for the data contact brain of the data contact brain of
- 3. **Input** the other side's reference in "Other Ref" (circled in red, right)
- Or if the solicitor displayed is not the solicitor you want to write to click on the green plus with the yellow folder and add the new case associate as previous outlined in the section on "How to Add a new Case Associate".
- 5. A screen will reappear listing the solicitors on the case.
- 6. Check the appropriate box(es) to **tag** the required solicitor(s).
  - Note If you tag two solicitors two documents will be generated.
- 7. Click Continue.
- 8. Word will open displaying the letter to solicitor.
- 9. Edit the document in Word as normal as required.
- 10. Save any changes and Print as required.
- 11. The action/task and document will then be present in the **Case Diary** for future review.

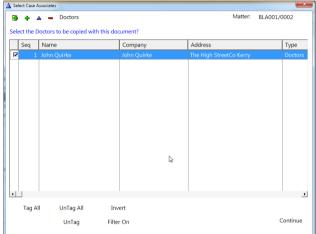
eneral Associat									
Details									
Type *	Garda		Code *	IO	0001				
Full Name *	Stillorgan Station		Phone Num	iber 28	2833445				
First Name	Enter first name		Fax Number	r Ent	Enter fax number				
Surname	Enter surname		Home		er home number				
Salutation	Garda Jones		Mobile Nun	nber Ent	er mobile numb	er			
Company	Stillorgan Garda Sta	ition	E-Mail		er email				
Title	Enter title		DX Reference	ce Ent	er DX reference				
	2 Main Street,		Nominated						
Address	Stillorgan, Co. Dublin		County		er county				
Address			Postal Code		er postal code				
Specific Informa	tion For Case								
				Dataila					
Other Side Det			Insurance						
Our Code	Enter our o		Our Code		Enter our cod				
Other Reference	NAN/DC80	007/1234	Insurance	Reference	Enter insuran	ce reference			
ect Case Associa	tes Solicitors				Ma	tter: BLA	4001/0001		
+ <b>A</b> -	<ul> <li>Solicitors</li> </ul>	vith this document?			Ma	tter: BL4	001/0001		
+ <b>A</b> -	<ul> <li>Solicitors</li> <li>ors to be copied w</li> </ul>	vith this document? Compan	y	Address		tter: BL4	A001/0001 Type		
t the Solicit Seq Nar	<ul> <li>Solicitors</li> <li>ors to be copied w</li> </ul>		-	_					
t the Solicit Seq Nar 1 Allse	<ul> <li>Solicitors</li> <li>ors to be copied with the second se</li></ul>	Compan Allsop &	-	2 Baggo		lin 2.	Type		
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A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A	<ul> <li>Solicitors</li> <li>ors to be copied with the copied withe copied with the copied with the co</li></ul>	Compan Allsop &	Browne	2 Baggo	tt StreetDub	lin 2.	Type		
t the Solicit Seq Nar 1 Allsa 2 Edw	<ul> <li>Solicitors</li> <li>ors to be copied with the copied withe copied with the copied with the co</li></ul>	Compan Allsop &	Browne	2 Baggo	tt StreetDub	lin 2.	Type		
t the Solicit Seq Nar 1 Allsa 2 Edw	<ul> <li>Solicitors</li> <li>ors to be copied with the copied withe copied with the copied with the co</li></ul>	Compan Allsop &	Browne	2 Baggo	tt StreetDub	lin 2.	Type		

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

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

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

+ +	<ul> <li>Doctors</li> </ul>		Matter:	BLA001/0001
	ctors to be copied with t Name	Company	Address	Туре
Tag All	UnTag All	Invert		



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

Case Associates					×
	φ Δ	Saved Queries:	l Records 💌 🐂	Ж	
Doctors	Search:		Search all Categorie:	Go	Clear
	Code	Name / Company	Address	Phone	
	000002	George Gibbons ( )	The Surgery23 Heath RoadTerenureD	01 2345555	
	904379	Dr Death ( )	The Surgery		
	BLO001	Dr Simon Bloggs ( )	The Surgery2 Church StreetDublin 12	4566777	
	QUIR01	John Quirke ( John Quirke)	The High StreetCo Kerry	41213112	
	SLI003	Slievemore clinic ( Slievemore clinic)	StillorganCo Dublin	01 2001111	
H (4 ( 7 ) > D( ))	14 44 4 7	<b>1   0</b>   1	lə		,
				Se	lect

# 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 is already been added to the case associates.
- 2. Edit the document in Word as normal if required.
- 3. Save any changes and Print as required.
- 4. The action/task and document will then be present in the Keyhouse Case Diary for future review.

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

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

Messag	je												
	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 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.

🛕 Update User V	ariable			×
General Prope	erties			
BLA001/0002	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Dublin 6			
Secretary's Re				
1				
				<< >>
		N/a	ок	Cancel
Client/Case	Case: 8LA001/0002 Gordon T. Black			
Case Diary	2 Trinity Close, Rathgar, Dublin 6 Form (Default View)			
Surrent Client Details	Search Dotal	Value		
Other Case Details Associates	List the Contents passing with the house (if any).     Contents NOT passing with property ? (if any)	None N/A		
Critical Information & Know Your Client	Sale Price of property (e.g. 100,000,00) Deposit Amount in full (e.g. 10,000,00) 7	200,000.00 20,000.00		
A/c Ledger	Description of the property for the Contract.	in the property known	n as Folio 1234F	
With good and	The Deads to be Steel in Deamcents Schedule in the Contract.	Con: Morto	the second	and second
	Maintain Other Case Details			>
General Prop	perties			
BLA001/000	02 Gordon T. Black			
	Sale of 2 Trinity Close, Rathgar, Dublin 6			
Contents N	NOT passing with property ? (if any)			
Curtains in	n sitting room			
			O	

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

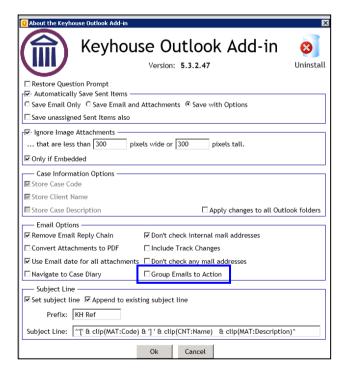
- 1. Double click on the action to generate it.
- 2. This will take you to Outlook. The email can then be edited and sent in the normal way.
- 3. Return to Keyhouse and complete the action in the normal way. See "Marking a Task as Complete" for further information.

## 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	8										
Injuries Board (PIA8)	¥		A.,	P.,	D.,	A.,	Date		Time	Handler	Syno	psis
Initial Consultation		8				1	04 Mar 2015		10:11	ON		re Papers for Counsel.
PIAB commencement Letters to all Parties		•	0	1			28 Oct 201	2	Add 544			e proof of ID
Chase Letters		6	2			ł	07 Sep 20	č.	Delete			rommo-reply@accounts.google.com - Nev
Pay for Medical Report		•				1	07 Sep 20		EMeil Action			(e) EMail Action
Draft Form A and contact Client to review Me	dical	6					01 Sep 20	5	Copy			(*) EMail Action (using Template)
Client appointment to review Medical Report	and	•				1	Oli Aug 20 👔	1	Paste			for training keyhouse Je@gmail.co - Test En
Issue PIAB application		6				1	Oli Aug 20 🖣	5	Copy to anoth			o:Brenda Hartley - (BLAD01/0001) Gordon
Check on PIAB acknowledgement (s 50)		•	8			÷	28 Jul 201:	١.	Move to anoth			fe: - [BLA001/0001] Gordon T. Black
Review PIAB application		•				ł	03 Mar 20	5	Generate Docu			
Send Special Damages schedule to PIAB		•				÷	03 Mar 20	2	Complete Acti Complete Heli			to Client
PIAB Assessment and Brief		•	*				16 Jan 201	2	Create Outlook			forbrian@keyhousedemo.ie - Draft Pleadin
Error in Medical Report		•	٩			ł	28 Aug 20	5	Show Artiste A			al Report
Chase Barrister		•	٩				29 Nov 20	ί.	Assign Action			re Finance
Contact Client re PIAB Barrister Opinion		•	\$			ł	22 Nov 20 🖻	•	Take Action			loc - Draft Pleadings
Client appointment to decide on Assessment		•	٩				11 Aug 20		Mile Stone Act	ion		h Black
Accepting PIAB Assessment		•					12 May 20 🛍		Alarm Action			No.218
Take instructions on legal proceedings		6				ł	19 Jan 201	2	Alarm Case			settlement
Review whether Monies received		•	٩			ł	13 Jan 201	-	Output Grid Li	110		al Statement
Close file		•				÷	05 Jan 2011		22:21	85	Reply	to PIAB 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" 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 items in the Case Diary go to the About Button in Outlook and tick the Group Emails to Action.



## Working with Documents already Processed

## Marking a Task as Complete

Tasks after being generated <sup>‡</sup> 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 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.

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

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

	Follow-Up Action X									
			Drag a co	olumn header here to group by that column						
		Decision	Next Action	Next Action Description						
۲		Do	S4	Draft Contract	^					
				ОК						
2										

Or

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

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

## **Opening Documents Generated**

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

😢 🚔 0	Phone Log Ma	ö (Ö	j (Ö)							
Actions	Documents		Accounts							
Client/Case	Case: BLA001/0001	1		on T. Black	issroads. G. Black					Tel: 01 476 F/e: BS
Case Diary	WARNING : Invoice				issi daus, d. black					
Document Manager Current Client Details	WARNING : Invoice	is outstanding o	rer 3 Years 8 Mo	nths 19 Days .						Ignore Show
Current Case Details	Search							Standard	View 📃	Preview
Extra Case Details	C. A. P. 0	D., A., Date	Time	Handler	Synapsis			Action Co		Warning Letter to Defendant 🥠
Associates	in 📸	# 21 Jan 2	016 17:13	CN	PIAB commencement Letters to all Parties			PIB02	P ^	Preview Document
Critical Information	0 1	08 Jan 2	016 11:59	CN	provide proof of ID			ADMUD	P	
Know Your client	9	01 Sep 3	015 09:42	CN	Critical Date			G23	P	BLA001/0001/BS
📓 A/c Ledger	1	01 Sep 2	015 09:42	CN	Review File			G16	P	
Time Ledger Debt Ledger	9 1	15 Mar	2015 17:00	BS	Statute of Limitations Date = 25/03/2015			ADMSD	P	David Green
Reserve Ledger	1	13 Mar	2015 17:17	BS	Review File			G16	P	66 Florence Parade
Undertakings	#	04 Mar	2015 10:11	BS	Prepare Papers for Counsel.				<b>P</b>	Terenure Dublin 6
	ی ک		2015 15:33	CN	Email From:no-reply@accounts.google.com - New sign-in from	m Chrome on Win		EMI	P	21 January 2016
Strong Room	🥌 🗢	# 07 Sep 2	2015 15:29	CN	Email To:Shaun Dwyer - [BLA001/0001] Gordon T. Black			EMI	P	
	<b>S</b>	01 Sep 2	2015 12:15	CN	Letter to Client ?			G02	P	Re: RTA Walkinstown
	🍯 🛸		2015 12:35	CN	Email To:'training.keyhouse.ie@gmail.co - Test Email			EMI	P	Crossroads, G. Black
	🍯 🗢	# 04 Aug	2015 12:31	CN	Email To:Brenda Hartley - [BLA001/0001] Gordon T. Black			EMI	P	Our Client: Gordon T. Black
	S 🗢	# 28 Jul 2	15:05	CN	Email To: - [BLA001/0001] Gordon T. Black			EMI	P	Dear Mr Green,
	S 📒	# 03 Mar	2015 17:23	BS	test			G13	P	
	<b>S</b>		2015 17:17	BS	Letter to Client			G02	P	We act for the above named who has suffered personal injuries as a result of a
	S 🗢	# 16 Jan 2	014 09:37	BS	Email To:brian@keyhousedemo.ie - Draft Pleadings from Cou	nsel		EMI	P	accident on the above date.
	S 🛈	# 28 Aug	2012 12:33	BS	Medical Report			G13	P	
	S 🛈		2011 11:56	BS	Letter re Finance			POO	P	We are satisfied from our instructions that you are responsible for this accident and
	🥌 🛸	# 22 Nov	2011 09:36	MW	Email To: - Draft Pleadings			EMI	P	therefore liable to compensate our client for their personal injury, loss and damage. We
	2 2	11 Aug	2011 11:09	MW	Gordon Black			PHO	P	hereby call upon you to admit liability to our
	<u>S</u>	12 May		BS	Invoice No:218			DB01	P	client in an open letter within 10 days from the date hereof.
	<b>S</b>	🕴 19 Jan 2	011 22:23	BS	Reject settlement			020	P.	, the date nereot.
	Attachmer	nts Search						Standard View		In the event of it being necessary, our client' claim for damages will be the subject of an
Tasks	Type Do	cument				Version Date	Document Class			application to the Personal Injuries
	🕨 🖪 Wa	arning Letter to (	efendant			1 21 Jan 2016	Letters/Interparty Correspondance		^	Assessment Board ("PIAB").
Search/Open										In the event that it becomes necessary to
Client/Case										issue proceedings against you, our client will as part of their claim, seek from you the cos

- 2. **Double Click** on the document in the attachment window. Word will launch and open the document.
  - Tip to preview a precedent document click on **search/open** on the navigation bar. Then click on **template library** then search for the precedent required. See the chapter on Search and Open for further details.

## Changing the Name and Class of a Generated Document

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

1	Type	Document	t									
	(E	Letter to Lending Institution	0 0	Properties History								
	\ \	Documer	nt Proi	perties								

4

Cancel

¥

Document Date: 04 Nov 2014

Document Type: Document

E

Document Class: Letters/Interparty Correspondance

Ok

## Undertakings

## **Viewing Undertakings**

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

1									Keyhouse Case Management (CN - Carol Nolan - 00:01 / 07:29)
Home Case Repor	ts Ph	one	Log	М	laintain	Setup Help			
New Item • Print • Cap		8		200	0	on Start Timer P	Ö		
Actions Print Cap	ture Ger		ument		ete Acti	Account			
Client/Case	Case	e: Al	BA00	1/00	01	••		lbrahams	
Case Diary							Family	Law	
🖉 Document Manager		S	Sear	rch					
& Current Client Details	A	C	•	D	DA	Date	Time	Handler	Synopsis
Current Case Details	Action	С #	i and	P	U A.			MW	Title Documents
Extra Case Details	1001			-		19 May 2016	17:16		
Associates		•				19 Jun 2014	11:41	BS	Invoice No:230
Critical Information		•				19 May 2014	16:32	BS	Letter from Accountant
Know Your Client		•				01 May 2014	23:54	BS	Invoice No:229
A/c Ledger		9	۲		9	01 May 2014	22:29	BS	Email From:keyhousedemo@gmail.com - Mobile Call to Brian Sweeney
Time Ledger		9	۲		P	01 May 2014	12:30	BS	Email From:brian@keyhouse.ie - Practice Management Review Age
Debt Ledger		•	۲		8	01 May 2014	00:00	BS	Email To: - Financial Trends for the Econo
Reserve Ledger		•	٤			27 Feb 2014	09:01	BS	David Abrahams
Undertakings		•			9	27 Feb 2014	07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for Key Performa
Strong Room						16 Jul 2013	15:54	BS	Letter to Solicitor re title Letter to Allsop & Browne
- min m		L.	_~	~~~		~ ~			man a share a mark

3. Any Undertakings in the case will be displayed.

				Keyhouse Case Management (	CN - Carol Nolan - 00:01 / 07:29)		Quick Search (Ctrl + Q)
Home Case Reports	s Phone Lo	g Maintain Setup H	łelp				
Print - Add Edit Dele Undersking	te Discharge						
Client/Case Case Diary	Case: ABAC	001/0001	David Abrahams Family Law				Tel: 01-2 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	•	21 Jan 2016	Documents	Peter D. Jones & Co.		0.00 Title Documents	
Critical Information Know Your Client							
A/c Ledger Time Ledger							
Debt Ledger Reserve Ledger							
Undertakings							

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

## Adding and Viewing an Undertaking

- 1. Go to the Undertaking screen.
- 2. Click on the Add tool on the Home tab and the following screen will appear:

## 3. **Input** the following Information

Comment to Ledger:	Using the tick box provided tick if you want a comment added to the ledger										
Needs Attention:	Tick if it needs to be action.										
Date	This is actual date of the General Esta Notes										
	Client: ABA001 @ Add as Comment to Ledger Needs Attention Matter: 0001 Family Law										
	button to select a date										
	from the calendar.										
Diary Warning Date	This is the date the										
	Undertaking Action will										
	appear on the Fee										
	Earners Task List as a To Do Item. This will default										
	to a system warning date										
	to amend click on the										
	down arrow to view a										
	calendar and select a date.										
Turne	Check the appropriate button for the type of undertaking i.e. <b>Financial</b> or										
Туре	Documents.										
Given or Received	Select whether the undertaking has been <b>given</b> by you or <b>received</b> by you.										
Commercial	Select whether the undertaking is commercial or non-commercial										
Authorised by FE	Click on the down arrow to select the relevant Fee Earner against the undertaking.										
Undertaking to	Click on the down arrow to select the relevant Case to whom the undertaking is been given or received.										
Who	This will default to the selected case associate.										
Details	Input a description of this undertaking.										
Value	Input the amount the undertaking is for.										
Status	Click on the down arrow and select the required status.										
Dealing Number	Input the dealing number										

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

۲				Keyhouse Case Management (CN - Carol Nolan - 0	201/07:29)	(a) QU	uick Search (Ctrl + Q) 🛛 🗕 🗗	8 X
Home Case Reports	Phone Log	Maintain Setup Help						
Print - Add Edit Delete Underskings	Uscharge							
Sclient/Case I Case Diary	Case: ABAOC	01/0001	David Abrahams Family Law				Tel: 01-29 F/e: AM	
🖉 Document Manager	Search						Standard View	
Securrent Client Details Current Case Details	Attn	Date	Туре	Who	Value	Details	Discharge	Prev
Extra Case Details	•						1	^ Iew
<ul> <li>Associates</li> <li>Critical Information</li> <li>Know Your Client</li> </ul>								
A/c Ledger Time Ledger Debt Ledger Reserve Ledger								
Undertakings				man man			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~

## AND

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

All Undertakings can be clearly identified by the Undertaking symbol 🚇

	S	Sea	rch				]		
Action	C	A	P	D	A	Date	Time	Handler	Synopsis
on	₽	6				02 Nov 2015	17:22	CN	Photo Id
	<b>₩</b>				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
$\sim$	$\sim$		~	~	1.11			wasan ~	more thank the second

- 5. To view the Undertaking details **double click** the task the following Change Action dialogue box will appear.
- 6. Click **OK** to close.
  - Tip: To edit go to the Undertaking screen. Then double click the required undertaking, amend and click OK.

## How to Edit an Undertaking

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

## How to Discharge an Undertaking

1. Go to the Undertaking screen.

)							
eneral Extra Notes							
Client: ABA001				Add as Comment	to Ledger	Needs /	Attention
Matter: 0001 Date	Family Law 12 Feb 2016			<ul> <li>Diary Warning Date</li> </ul>	12 Feb 2016	v	
	12 Peb 2016			Diary warning bate			-
Туре		Given or Re	ceived		Commercial or No		_
Financial 🔾	Documents 🔾	Given 🔾		Received 〇	Commercial O	Non-Commercial	
Authorised Fee Earner	MW		¥	Martina Winters			
Undertaking To	Select undertaking to	¥	x				
Who							
Details Enter details							
Enter details							
Value	0.00			Dealing Number	Enter dealing number		
Status	Select status		~	Category	Select Category		~
Conditional	Enter condition						
						<u>o</u> k	Cancel
)			Edit U	Indertaking		Ōĸ	<u>C</u> ance
eneral Extra Notes Client: ABA001	Undertaking Logs		Edit U	Indertaking	to Ledger	<u>Q</u> K	
eneral Extra Notes Client: ABA001 Matter: 0001	Family Law			Add as Comment			Attention
Client: ABA001 Matter: 0001 Date			[		27 Jun 2014	Needs /	
eneral Extra Notes Client: ABA001 Matter: 0001 Date Type	Family Law 27 Jun 2014	Given or Re	[	Add as Comment	27 Jun 2014 Commercial or No	Needs /	Attention
Client: ABA001 Matter: 0001 Date	Family Law	Given or Red Given 〇	[	Add as Comment     Diary Warning Date	27 Jun 2014	Needs /	Attention
eneral Extra Notes Client: ABA001 Matter: 0001 Date Type	Family Law 27 Jun 2014		[	Add as Comment	27 Jun 2014 Commercial or No	Needs /	Attention
eneral Extra Notes Client: ABA001 Matter: 0001 Date Type Financial O Authorised Fee Earner Undertaking To	Family Law 27 Jun 2014 Documents		ceived	Add as Comment     Diary Warning Date	27 Jun 2014 Commercial or No	Needs /	Attention
eneral Extra Notes Client: ABA001 Matter: 0001 Date Type Financial O Authorised Fee Earner Undertaking To Who	Family Law 27 Jun 2014 Documents  MW	Given 〇	ceived	Add as Comment     Diary Warning Date	27 Jun 2014 Commercial or No	Needs /	Attention
eneral Extra Notes Client: ABA001 Matter: 0001 Date Type Financial O Authorised Fee Earner Undertaking To	Family Law 27 Jun 2014 Documents  MW	Given 〇	ceived	Add as Comment     Diary Warning Date	27 Jun 2014 Commercial or No	Needs /	Attention
eneral Extra Notes Client: A8A001 Matter: 0001 Date Financial O Authorised Fee Earner Undertaking To Who Peter D. Jones & Co.	Family Law 27 Jun 2014 Documents  MW	Given 〇	ceived	Add as Comment     Diary Warning Date	27 Jun 2014 Commercial or No	Needs /	Attention
eneral Extra Notes Client: ABA001 Matter: 0001 Date Type Financial O Authorised Fee Earner Undertaking To Who Peter D, Jones & Co. Details	Family Law 27 Jun 2014 Documents  MW	Given 〇	ceived	Add as Comment     Diary Warning Date	27 Jun 2014 Commercial or No	Needs /	Attention
eneral Extra Notes Client: A8A001 Matter: 0001 Date Financial O Authorised Fee Earner Undertaking To Who Peter D. Jones & Co.	Family Law 27 Jun 2014 Documents  MW	Given 〇	ceived	Add as Comment     Diary Warning Date	27 Jun 2014 Commercial or No	Needs /	Attention
eneral Extra Notes Client: ABA001 Matter: 0001 Date Type Financial O Authorised Fee Earner Undertaking To Who Peter D, Jones & Co. Details	Family Law 27 Jun 2014 Documents  MW	Given 〇	ceived	Add as Comment     Diary Warning Date	27 Jun 2014 Commercial or No	n Commercial Non-Commercial	Attention
eneral Extra Notes Client: ABAO1 Matter: 0001 Date Financial O Authorised Fee Earner Undertaking To Who Peter D. Jones & Co. Details Title Documents	Family Law 27 Jun 2014 Documents * MW Select undertaking to	Given 〇	ceived	Add as Comment Add as Comment Diary Warning Date Received  Add as Comment Additional Winters	27 Jun 2014 Commercial or No Commercial	n Commercial Non-Commercial	Attention
Client: ASAOO Matter: 0001 Date Financial O Uthorised Fee Earner Undertaking To Who Peter D. Jones & Co. Details Title Documents Value	Family Law 27 Jun 2014 Documents * MW Select undertaking to 0.00	Given 〇	v x	Add as Comment Clary Warning Date Clary Warning Date Received  Martina Winters Dealing Number	27 Jun 2014 Commercial or No Commercial O	n Commercial Non-Commercial	Attention
eneral Extra Notes: Client: ASAOO Matter: 0001 Date Financial O Authorised Fee Earner Undertaking To Who Peter D. Jones & Co. Details Title Documents Value Status	Family Law 27 Jun 2014 Documents * MW Select undertaking to December 2010 Pre Registration	Given 〇	v x	Add as Comment Clary Warning Date Clary Warning Date Received  Martina Winters Dealing Number	27 Jun 2014 Commercial or No Commercial O	n Commercial Non-Commercial	Attention
eneral Extra Notes: Client: ASAOO Matter: 0001 Date Financial O Authorised Fee Earner Undertaking To Who Peter D. Jones & Co. Details Title Documents Value Status	Family Law 27 Jun 2014 Documents * MW Select undertaking to December 2010 Pre Registration	Given 〇	v x	Add as Comment Clary Warning Date Clary Warning Date Received  Martina Winters Dealing Number	27 Jun 2014 Commercial or No Commercial O	n Commercial Non-Commercial	Attention
eneral Extra Notes: Client: ASAOO Matter: 0001 Date Financial O Authorised Fee Earner Undertaking To Who Peter D. Jones & Co. Details Title Documents Value Status	Family Law 27 Jun 2014 Documents * MW Select undertaking to December 2010 Pre Registration	Given 〇	v x	Add as Comment Clary Warning Date Clary Warning Date Received  Martina Winters Dealing Number	27 Jun 2014 Commercial or No Commercial O	n Commercial Non-Commercial	Attention
eneral Extra Notes: Client: ASAOO Matter: 0001 Date Financial O Authorised Fee Earner Undertaking To Who Peter D. Jones & Co. Details Title Documents Value Status	Family Law 27 Jun 2014 Documents * MW Select undertaking to December 2010 Pre Registration	Given 〇	v x	Add as Comment Clary Warning Date Clary Warning Date Received  Martina Winters Dealing Number	27 Jun 2014 Commercial or No Commercial O	n Commercial Non-Commercial	Attention
eneral Extra Notes: Client: ASAOO Matter: 0001 Date Financial O Authorised Fee Earner Undertaking To Who Peter D. Jones & Co. Details Title Documents Value Status	Family Law 27 Jun 2014 Documents * MW Select undertaking to December 2010 Pre Registration	Given 〇	v x	Add as Comment Clary Warning Date Clary Warning Date Received  Martina Winters Dealing Number	27 Jun 2014 Commercial or No Commercial O	n Commercial Non-Commercial	Attention

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

۲				Keyhouse Case Management	(CN - Carol Nolan - 00:01 / 07:29)		Quick Search (Ctrl + Q) – 5 ×
Home Case Reports	Phone Log	Maintain Setup H	ielp				
Print - Add Edit Delet							-
Client/Case Case Diary	Case: ABAOC	1/0001	David Abrahams Family Law				Tel: 01-2902222 F/e: AM
Document Manager	Search						Standard View
Scurrent Client Details	Attn	Date	Туре	Who	Value	Details	Discharge
Content Case Details  Case De	•	21 Jan 2016	Documents	Peter D. Jones & Co. Q. Add Q. Edit Q. Delete		0.00 Title Documents	
A/c Ledger     Time Ledger     Debt Ledger     Reserve Ledger     Undertakings     Strong Room				Q Discharge			

- 2. Click on the **Discharge**; the following dialogue box will appear displaying the undertaking.
- 3. **Input** a description in the discharge description box.
- 4. Click **OK** you will then return to the undertaking screen where the undertaking will have a discharge date lodged against.
  - **Note** It cannot be edited beyond this point.
  - Note: Not all users will have permissions to discharge an undertaking.

## Undertaking Reports

#### **Undertakings by Matter**

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

Set the Parameters by: Selecting a date the current matter number will appear by default; change if required. Input All, Not Discharged or Discharged.

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

Undertakings By Matter
Undertakings By Client

12 Feb 2016

E	nter Parameters	
To Date	27 Jul 2015 15	
Discharge Status	Not Discharged 🗸	
Matter Code	FLY001/0001	
From Date	27 Jul 2014 15	
Financial or Documentation	All	

2

۲

Print -Activity Report

🚔 Case Summary Report Matter Label 🛋 Client Label

4. Click on print e or click on one of and 🔹 🕞 the following options available on the report toolbar: Click on Doc to open a copy to Word Click on PDF to open in Adobe. Click on XLS to open a copy in Excel.

## How to view Critical Information and Print Reports

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

Home Case Report	s Phone Log Maintain Setup	Help			Keyhouse Cas	e Managemi	int	( CN - Carol Nolan -	0035/0000)		(		) - •
Print - Start Timer Post Tim Accounts	re												
Client/Case	Case: ABA001/0001	David A											Tel: 01-290
Case Diary		Family I	law										F/e: AM
Document Manager Current Client Details	No comment is available for this	matter.											
Current Case Details	Show Alert												
Other Case Details	Account Summary				Action Summ	ary							
Associates Critical Information	Debtors A/c	590.40	1 Year, 3 Months and 12 Di	ays O/s	Start Date	20 May 20	11	File Colour					
Know Your Client	Outlay A/c	0.00			Solicitor	Anne Mello		Statute Date	01 May 2014				
	Outlay Budget	500.00		0.00%	Case Status		/ho	Date	Description				
A/c Ledger	Current Outstanding Fees	480.00				Ct	-		Description			0040	
Time Ledger	Client A/c	(7,737.17)	1		Last Action		4	01 Oct 2015	Undertaking Crea	ated: Date: 01 Oct 2	2015 Type: Financial Given Authorised By: CN Carol Nolan Undertaking to: SM	004(Paul	
Debt Ledger	Client Current	(7,737.17)			Next Action		w	27 Jun 2014	Undertaking shore	nged by Brian Swee			
Reserve Ledger Undertakings	Client Deposit	0.00	1		Next Action	121	~	27 Jun 2014	Date: 27 Jun 2014	4	mey		
onder takinga	Current Locked Up Value	868.90	Percentage Of Estimated Fe	e					Type: Documents Authorised By: M				
trong Room	Total Work in Progress	278.50			Last Record Ti	me BS		19 Jun 2014		discuss asset shee	e.		
	Write Off Time	0.00											
	Fees Issued To Date	3,657.50			Undertakings								
	Fees To Date + WIP	3,936.00			Description			Value	Who	Given/Received			
	Estimate Fees	0.00	Estimate Given		Title Documen		_		ter D. Jones & Co.	Received			
	Draft Invoices	0.00			Forward Moni	es upon rece	ipt 2	0,000.00 Paul	Smith (Paul Smith)	Given	]		
	Last Bill Date	19 Jun 2014											
	Expected Bill Date	×											
	Possible Value To The Client	0.00											
	Anti Money Laundering checked	Approve	]										
	Time By F/e	Work in Progres	15	Total Tim	e								
	Brian Sweeney	0:38	142.50	14	4:59	3,30	0.00						
Tasks	Carol Nolan	0:40	136.00	0	0:40	13	5.00						
Search/Open	Stephen Keogh	0:00	0.00		2:00	50	0.00						
Client/Case		1:37	278.50	11	7:39	3,93	5.00						
Time Costing				1									

- 3. To Print a report click on Print on the toolbar the following option will appear.
- 4. Click on the Report required

For Activity Report Click on Activity Report The current case code will appear; amend if required

**Set** the **date** parameters Tick the items you want included e.g. Emails, attachments etc. Click Run

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

## Chapter 5: The Task Manager

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

## Navigating the Task List

## The Task Screen

Home Case Reports	Phone Log	Maint Too	lba	r			ynouse	euse manugemente (et al et				( Quick search
Actions	Generate Comp Documents Handler Carol			Searc	h Bo	сх		]				Preview
My tasks	Search Search									Standard Vi	ew 🔲	Letter to Lending Institution 🔶
Team tasks		Date	Time	Case Code	Handler		From	Client/Case(Matter) Charlie Gleeson	Action	Diary Date	~ ^	_
Day's tasks	1	P 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	<b>₿</b> ₿	🍽 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	
Iverdue 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 Sale of 2 Trinity Close, Rathgar, Du	Review File	04 Nov 2	P	Re: Our Clients - Gordon T. Black
ty Overview	<b>E</b>	04 Nov 2014	17:26	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Letter to Lending Institution	04 Nov 2	P	Premises - Sale - 2 Trinity Close, Rathgar, Dublin 6
$\sim$	<b>E</b>	04 Nov 2014	17:25	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Instruction Received	04 Nov 2	P	Loan No 67889990
		04 Nov 2014	17:25	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Letter to Lending Institution	04 Nov 2	P	Dear Sir/M
Task viev	VS	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
	HK (	04 Nov 2014	17:24	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Letter to Lending		5	Preview Pane
	<b>E</b>	04 Nov 2014	17:19	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Task	list	J	
	<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	04 Nov 2	P	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 RTA Walkinstown Crossroads, G. Bl	Letter to Doctor	04 Nov 2	P	
	<b>E</b>	04 Nov 2014	16:55	BLA001/0001	CN	сом	CN	Gordon T. Black RTA Walkinstown Crossroads, G. Bl	Letter to Solicitor	04 Nov 2	P	
	<b>H</b>	04 Nov 2014	16:53	BLA001/0001	CN	сом	CN	Gordon T. Black RTA Walkinstown Crossroads, G. Bl	Letter to Solicitor	04 Nov 2	P	
	<b>H</b>	04 Nov 2014	16:52	BLA001/0001	CN	сом	CN	Gordon T. Black 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	<b>B</b>	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 Client/Case	<b>E</b>	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	
Time Costing				Count=60	1							

## The Home Tab in Task Manager

New Item - Actions	New	Click on the New to add any of these tasks.	<ul> <li>Action</li> <li>Note</li> <li>Email</li> <li>Appointment</li> <li>Phone Message</li> <li>Dictation</li> </ul>
			Draft Invoice
Print -	Printer	Click to print a reports on your task list.	
0 Capture	Capture	Click on capture to launch the document captur import documents or folders of documents or ir	
Generate	Generate	Click to generate a document for a selected acti	on.
Complete Action	Complete Action	Click to mark a task as complete.	

## **Task Views**

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

My tasks Team tasks	Click on My tasks to view the current handler's tasks or click on team tasks to view the team tasks
1 Day's tasks	Click on this to view today's tasks.
From 08 Nov 2014 V To 08 Nov 2014 V	Select a range of dates.
🔁 Next week's tasks	Click to view next week's tasks.
The second secon	Click to view next month's tasks
Overdue tasks	Click to view Overdue tasks
Outstanding tasks	Click to view outstanding tasks i.e. past, present or future.
👼 Last węek's tasks	Click to view Last Week's outstanding tasks.
🛅 Last month's tasks	Click to view Last Month's outstanding tasks.
🛃 All tasks	All Tasks shows all outstanding tasks
🇳 My Qverview	Click to view the overview screen.

## Using Different Layouts/Views

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

## How to Show/Hide the Preview Pane

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

## Searching, Sorting, Filtering and Grouping Tasks

## How to Search the Task list

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

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

ŝ	Revie	W		6	3							Standar	d 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	P
		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	P
		2		04 Nov 2014	18:15	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D	<mark>Review</mark> File	04 Nov 2014	P
		2		28 May 2014	08:36	BLA001/0001	CN	сом	CN	Gordon T. Black RTA Walkinstown Crossroads, G	Review all contracts	28 May 2014	P
		2		07 May 2014	11:49	KEL002/0001	CN	сом	CN	Sarah Kelly Purchase of Property	<mark>Review</mark> File	07 May 2014	P
E	E			07 May 2014	11:35	OCO001/0001	CN	сом	CN	John O'Connor John O'Connor V John Smith	File Review	07 May 2014	P
		2		26 Dec 2013	12:04	KEL002/0001	CN	сом	CN	Sarah Kelly Purchase of Property	<mark>Review</mark> File	26 Dec 2013	P

3. To clear the search results click Clear.

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

Review

## 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

Ser Ser	irch							
			Date	Time	Case Code	A Handler     (Blanks)	Tear	n
•	1		04 Nov 2014	18:16	BLA001/000	(Non blanks)	N	1
	1		04 Nov 2014	18:15	BLA001/00	AAA001/0001 AAA001/0003	N	1
Ħ			04 Nov 2014	17:26	BLA001/00	ABA001/0001 ABA001/0003	N	1
<b>B</b>			04 Nov 2014	17:25	BLA001/000	ABB001/0001 ABB001/0007	N	1
<b>6</b>			04 Nov 2014	17:25	BLA001/000	BIL001/0001 BLA001/0001	N	1
		18.	04 Nov 2014	17:24	BLA001/000	BLA001/0002 BLO001/0005	N	1
HC .			04 Nov 2014	17:24	BLA001/000	CLI001/0001 DEA001/0000	N	1
<b>11</b>			04 Nov 2014	17:19	BLA001/000	FIS001/0001 FIT002/0001	N	1
8			04 Nov 2014	17:11	BLA001/000	GLE001/0001 KEL002/0001	N	1

#### 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	andl	er C	arol	No	lan 🔽 🗹 Ou	tStandin	a Onlv					
ŝ	Se	arch				]						
					Date	Time	Case Code		Handler Team	From	Client/Case(Matter)	1
Þ			:	<b>1</b>	04 Nov 2014	19:31	GLE001/00	2↓ Z↓	Sort Ascending Sort Descending		Charlie Gleeson Lease of South West Georges Str	F
	<b>i</b>				04 Nov 2014	19:09	GLE001/00	₽¥ ⊡	Clear Sorting		Charlie Gleeson Lease of South West Georges Str	ι
	<b>B</b>				04 Nov 2014	19:07	ABA001/00	_	Group By This Co Show Group Pane		David Abrahams Sale of 22 O'Connell Street, Dubli	ι
			:		04 Nov 2014	18:16	BLA001/00		Show Column Cho Best Fit	ooser	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D	F
			:		04 Nov 2014	18:15	BLA001/00	0	Best Fit (all colum	ns)	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D	F
	<b>1</b>		~~~		04 Nov 2014	17:26	BLA001/00		Filter Editor	LCN	Gordon T. Black Sale of 2 Triph Schwar, Brokeran, D.,	I

- 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.

	► Case	Code:	AAA	001/0001							
	► Case	e Code:	AAA	A001/0003							
✓ Case Code: ABA001/0001											
		જ		25 Jun 2014	12:51	ABA001/0001	CN	сом	CN	David Abrahams Family Law	Court Date
		જ		07 May 2014	08:36	ABA001/0001	CN	сом	CN	David Abrahams Family Law	Court Date

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

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

## Working with Tasks

## Accessing a Case Diary from the Task List

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

## How to Generate Documents

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

## How to View the Documents of a Task

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

## How to play a dictation

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

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

## How to Mark a Single task as Complete

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

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

## How to Tag Several Tasks and Mark as Complete

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

## How to Alarm an Action/Case

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





Open Document

Play Dictation

Complete Action

d,

- 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

## View Other Users' Tasks

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

Handler Carol Nolan 🛛 🔽 OutStanding Only

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

		Show Sta	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.

	)		F/e Han	dler Stats			×
[	Search						
	Code	Name	Due Tasks	Outstanding Tasks	Outstanding Phone Calls	Team	
Þ	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.

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

## 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 a Outlook Task

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

#### How to Tag All Tasks

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

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

W 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.

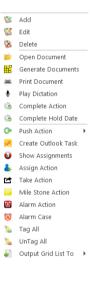
#### How to Add a New Item

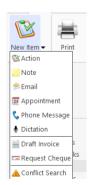
- 1. Click on New Item on the Home tab. The following options will appear.
- 2. Click on required item e.g. Note. The following window will appear.

G	Push Action 🛛 🗟	¥		To date
1	Create Outlook Task		7	Plus 7 days
N	Show Assignments		14	Plus 14 days
4	Assign Action		31	Plus 31 days

Tag All







	Add Action – 🗙
Action	
📅 Generate Document 🛛 🕜 Post Time 📒 Note	🚦 High 🛛 🖆 Take Action 🛛 🕲 Generate 🖉 Save
🚵 Open Attachment 🛛 🖋 Complete  🔗 Email	Normal 📥 Assign Action
🌵 Play Dictation 🛛 🚔 Print 🔗 Email (Templat	
Default Actions	Priority Assignment SDLT
General Properties Attachment/Documents Action	ion Assignments Other Notes
Case ABA001/0001 Family I	Law
Action Code Select a action code	
Date 03 Nov 2015 💟 Due Da	ate 03 Nov 2015
Subject	
General Email Appointment	
Fe/Handler Carol Nolan	V
Team Commercial	V
	Ok

- 3. Enter the following details:
  - **Case** The current case code will appear; to select a different case, click the **button** to see the matter list. Select the required case.
  - Action Code Click on the button to see a list of actions, and select the required task.

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

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

Subject Input a subject

- **F/e Handler** This will default to your handler code; use the down arrow to select a different handler if required.
- **Team** The team will default to your team amend if required using the down arrow.

**Description** Input a description in the box provided.

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

#### How to Edit a Task

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

				Add Action				-
Action								
👫 Generate Doc	ument 🕜 Post Time 🛛	Note	🚦 High	🖆 Take Action	隧 Generate	隧 Save		
철 Open Attachr	nent 🗹 Complete	🖻 Email	Normal	assign Action				
Play Dictation	🚐 Print	😤 Email (Template)	Low					
	Default Actions		Priority	Assignment	SDLT		 	
General Proj	perties Attachment/D	ocuments Action A	ssignments	Other Notes				
Case	ABA001/0001	Family Law						
Action Code	G03	Letter to Sc	licitor ?					
Date	03 Nov 2015		03 Nov 2015	; v				
Subject	Letter to Solicitor ?							
	Email Appointment	]						
Fe/Handle								
Team	Commercial		/					
Letter to Sc	Commercial							
							Ok	Car

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

#### How to Delete Tasks

- 1. **Right click** on the task to be deleted and select **Delete** from the pop-up menu.
- 2. Click **Yes** to confirm that you wish to delete the task.
  - **Note**: This will delete the action completely from the Case Diary of the matter.

Time Date Time Assigned Returned By By Delegate Team

02 Nov 2015 17:23

# **Assigning Tasks**

#### How to Recognise Assigned Tasks

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

	Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action
2	04 Nov 2014	19:31	GLE001/0001	CN	сом	CN	Charlie Gleeson Lease of South West Georges Str	Review File

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

Generate Document 🖉 Post Time 📒 Note

eneral Properties Attachment/Doc

Carol Nolan(CN)

Open Attachment 🛛 🖌 Complete 🔶 Email ≔ Print

ult Actions

Created

🗢 Email (Tem

Carol Nolan(CN)

#### How to View the Assignment History of a Task

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

#### How to Assign a Task to Another Handler

- 1. Right click on a task and select Assign Action from the pop-up menu. The following screen will appear listing all resources.
- 2. Select the resource you want to assign the task to.
- 3. Check the box marked Release Action to remove the task completely from your task list. Alternatively to continue to own the task, leave Release Action unchecked.
- Note If you are the owner of the task and do not release it, you will see this symbol 🔊 next to the task when the assigned user has "completed" it.

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

Date     09 Nov 2014     Time :     13:05       Search       Search     Number of Due Tasks     Team       ADM     Admin     LIT       AM     Anne Mellon     5       BS     Brian Sweeney     8       COM     Commercial     COM       LIT     Litigation     LIT       MW     Martina Winters     1       SK     Stephen Keogh     2	Re	sour	ces						
Code     Name     Number of Due Tasks     Team       ADM     Admin     LIT       AM     Anne Mellon     5     COM       BS     Brian Sweeney     8     COM       LIT     Litigation     LIT       MW     Martina Winters     1     LIT       SK     Stephen Keogh     2     COM	Da	te	09 Nov 201	4	۷	Time :	13:05		
Code     Name     Due Tasks     Team       ADM     Admin     LIT       AM     Anne Mellon     5     COM       BS     Brian Sweeney     8     COM       COM     Commercial     COM     LIT       LIT     Litigation     LIT       MW     Martina Winters     1     LIT       SK     Stephen Keogh     2     COM		Sear	ch			]			
AM     Anne Mellon     5     COM       BS     Brian Sweeney     8     COM       L     COM     Commercial     COM       L     LTT     Litigation     LIT       MW     Martina Winters     1     LIT       SK     Stephen Keogh     2     COM			Code	Name				Team	
BS     Brian Sweeney     8     COM       MU     COM     Commercial     COM       MU     LIT     Litigation     LIT       SK     Stephen Keogh     2     COM	Þ		ADM	Admin				LIT	
Image: Second system     Image: Commercial system     COM       Image: Second system     Image: Commercial system     Image: Commercial system       Image: Second system     MW     Martina Winters     Image: Image: Commercial system       Image: Second system     SK     Stephen Keogh     2     COM			AM	Anne Mellon			5	COM	
IT     Litgation     LIT       MW     Martina Winters     1       SK     Stephen Keogh     2			BS	Brian Sweeney			8	COM	
MW Martina Winters 1 LIT SK Stephen Keogh 2 COM		22	COM	Commercial				COM	
SK Stephen Keogh 2 COM		22	LIT	Litigation				LIT	
			MW	Martina Winters			1	LIT	
N			SK	Stephen Keogh			2	COM	
			Gr						

High 🖪 Take Action

**å**, D

02 Nov 2015 17:23 02 Nov 2015 17:23

ents Ot

Date

#### How to take a Task

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

	Take	Action
--	------	--------

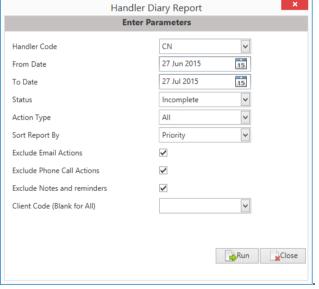
Ca	arol Nolan	Y OutStanding Only	, 
	Code	Name	
	ADM	Admin	^
	AM	Anne Mellon	
	BS	Brian Sweeney	
Þ	CN	Carol Nolan	
	сом	Commercial	
	LIT	Litigation	
	MW	Martina Winters	
	SK	Stephen Keogh	

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

# **Task List Options**

#### Print your task list

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



Include Closed	Check to include closed items
Select the handler	It will default to the current handler; select another if required using the down arrow.
Select the status	It will default to Outstanding; use the down arrow to change to All or Complete, if required.
From Date	Using the calendar to select the start date
To Date	Using the calendar to select the end date

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

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

Run

3. You may print the report a copy in:

PDF	XLS				
Type the	text to find	-			2
		Soo Grabbit	& Run	ne	
		Handle	r Diaı	Y	Data Date : 09/11/2014 : 15:43 From Date:02/03/2001 ToDate:09/11/2014
		Carol	Nolan	-	Status: Outstanding
					Action Type: All
Matter Action Id	Date Time	Client Name Description	From Status	Diary Code Item Type	Diary Description
<b>High Priority</b>					
FIT002/0001	19/12/2013 14:53:57	Melinda FitzGerald	CN	G16	Review File
1903	14:53:57	Sale of lands in wicklow	NA	Action	
Not Applicable	00/40/00 40				
KEL002/0001	26/12/2013 12:04:37	Sarah Kelly	CN	G16	Review File
1865 Not Applicable	12:04:37	Purchase of Property	NA	Action	
Not Applicable	07/05/0044	Careb Kaller	011	G16	Review File
KEL002/0001	07/05/2014	Sarah Kelly	CN NA	Action	Review File
Not Applicable	11.40.20	Purchase of Property	INA	Action	
BLA001/0001	20/05/2014	Gordon T. Black	CN	G16	Review all contracts
1817	08:36:03	RTA Walkinstown Crossroads, G. Black	NA	Action	Review all contracts
Not Applicable	00.00.00	NTA Walkinstown Crossroads, C. Black	10/2	Action	
BLA001/0001	04/06/2014	Gordon T. Black	CN	G16	incoming copies doc
1837	17:12:35	RTA Walkinstown Crossroads, G. Black	NA	Action	interning explore dee
Not Applicable		,			
AAA001/0001	27/10/2014	AAA Securities Ltd	CN	ADMSD	Statute of Limitations Date =06 Nov
1932	16:08:00	Landlord Dispute	NA	Statute Date	2014
Not Applicable					
BIL001/0001	01/11/2014	Noel Billing	CN	ADMUD	Undertaking Created:
1931	11:49:41	RTA Brennanstown Valley Roundabout	NA	Undertaking	Date: 01 Nov 2014
Not Applicable					Type: Financial Given Authorised By: AM Anne Mellon
BLA001/0002	04/11/2014	Gordon T. Black	CN	G16	Review File
1961	18:15:00	Sale of 2 Trinity Close, Rathgar, Dublin 6	NA	Action	
Not Applicable					
BLA001/0002	04/11/2014	Gordon T. Black	CN	G16	Review File
1962	18:16:39	Sale of 2 Trinity Close, Rathgar, Dublin 6	NA	Action	
Not Applicable		,			



#### How to Export a copy of your task list

- 1. **Right click** in your task list and select **Export To** from the pop-up menu.
- 2. Select the desired option:
  - **PDF**: Adobe Portable Document Format.
  - **Excel**: An Excel spreadsheet.
  - **Text**: A plain text file.
  - Rich Text: A Rich Text Format (RTF) document. RTF documents can be read by most word processors, including Word
- 3. The Windows **Save As** dialogue box will appear, with the chosen file type selected. Name the file and choose a location in which to save it.

Organize 🔻 New folder	r			•	(
🔆 Favorites	Name	Date modified	Туре	Size	
🧮 Desktop	퉬 keyhouse	03/11/2014 16:21	File folder		
〕 Downloads	퉬 khframework	22/10/2014 10:59	File folder		
📃 Recent Places	🐌 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					
Videos					
輚 Homegroup					
. Committee		2			
🖳 Computer					
Keyhouse (\\helli					
🖬 Network 👻					
File name:					
Save as type: Excel F	ile (* vlev)				

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

🔊 Export To 🔪 🕨 🕨	6	PDF
13	H	Excel
	E	Text
	E	Rich Text

# **Chapter 6: Know Your Client**

## **Know Your Client**

This section collates information stored on a number of screens in the Keyhouse System into one location. It enables you to see information at a glance.

General Tab	Details all contact groups to which the Client is associated e.g. Taxation Changes Mailing List
Anti-Money Laundering	Details the documents received to show that checks have been carried out.
Financial	Gives a summary of the Account transactions
Client Records	Details key actions that have been carried out on the matter.
Other Details	Details any Client specific information collected through UDF Forms e.g. Number of Children
Activity	Details all the activity carried out on the matter.
Client Contact	Details all client contact information stored for the client

#### **General Tab**

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

Home Case Reports	Phone Log Maintain Setup Help			Keyhouse Case Manager	nent (CN - Carol Nola	n - 00.02 / 07.28)						Quick Search (Ctrl	+ 0) - • •
Start Timer Post Time Add	Clear All Delete All Import												
Client/Case	Case: A8A001/0001	David Abrahams											Tel: 01-29022
Case Diary	F	amily Law											F/e: AM
Document Manager	General Anti Money Laundering Financial	Client Records Other Deta	ills Activity										
Current Client Details	No. of open matters 2	Last Activity Date 27 Jun 201	1	Insert C	ontact Category		×						
Converte Case Details Converte Case Details Critical Information Know Your Client	No. of open matters this year 0 Last Matter Created 25 Apr 2012	ABA001/0002 HIPS Negligence - October		David Abrahams Select category type		Please select date Select category type	<b>&gt;</b>						
A/c Ledger	Client Category Profile		Extra Information										Standard View
Time Ledger		Category Description					-1	4 5	ield Value 5	Field Value 6	Field Value 7	Field Value 8	Field Value 9
Debt Ledger Reserve Ledger	Business Source	News Letter					— F	+ FI	ield value 5	Field value o	Pielo value 7	Pielo value o	Pield value 9
Undertakings	Mailing List	Private Clients List					_1						
g Ondertakings	Mailing List	XMAS Cards											
Strong Room						<u>Dk</u>	ncel						
Tasks Search/Open	€						_						
Client/Case Time Costing												ļnse	t <u>C</u> hange <u>D</u> elete

- 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.

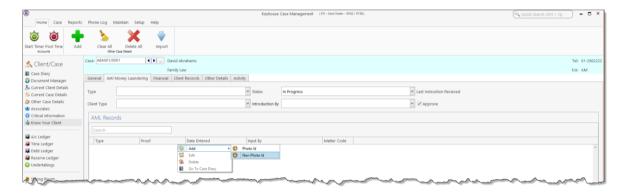
Туре:	The type of AML carried out e.g. Standard Due Diligence, Enhanced Due Diligence etc.
Client Type:	Relates to the client category e.g. Corporate, Charity, Public Sector etc.
Status:	Records where all checks are complete or are still in progress
Introduced By:	Records how the client was introduced 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 been added to this screen from outside Keyhouse and documents already in Keyhouse can also appear on this screen.

1. To add a document from outside Keyhouse, right click on white area and select Add.



- 2. Then select whether the document is Photo ID or Non Photo ID.
- 3. Navigate to the location where the document is stored and select the required document. Click Open.

	Open File				×
	ments 🕨 Scan Folder		v ♂ Searc	h Scan Folder	,c
Organise 👻 New folder					
🔆 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					
🖳 This PC					
🗭 admin (keytrain)					
Desktop					
Downloads					
Music					
E Pictures					
📔 Videos					
indows (C:)					
File <u>n</u> ame: Electrical	Bill for David Abrahams.pdf		✓ All fi	les (*.*)	~
				Open Ca	ancel

# 4. Select the type of ID supplied

Home Case Report	ts Phone Log	Maintain	Setup Help		Keyhouse	Case Management	( CN - Carol Nolan - 00	91 / 07.29)		Quick Search (Ctrl + Q)	- ª ×
Start Timer Post Time											
Sclient/Case ■ Case Diary	Case: ABA001/		Family	Law							Tel: 01-290222 F/e: AM
Document Manager Scurrent Client Details Current Case Details	General Ant		d Due Diligence	nt Records Other Details Activ	✓ Status	In Progress			Last Instruction Recieved 22 Jan 2016 10:08:00		
<ul> <li>Extra Case Details</li> <li>Associates</li> <li>Critical Information</li> </ul>	Client Type		tial Private Individual		Y Introduction By	Face to Face Meet	ıg		Approve		
🛓 Know Your Client	AML Reco	ords									
<ul> <li>Time Ledger</li> <li>Debt Ledger</li> <li>Reserve Ledger</li> <li>Undertakings</li> </ul>	Туре		Proof	Date Entered	Input By		Matter Code				^
Strong Room						Ban Doo Doo Hou Inst Loc Mer	cription statements, or cre- umentation/cards is sehold insurance ce unent of a court ap a dathority documen lical card for over 1 or insurance certific	Si/debit card state ^ sued by the Depart used by the Revenu Titicate and reneal pointmet (such as L. 4 or rituse collect 8s with intellectual di de and revenuel noti se generate from the.			
Tasks								Utility bills (in	cluding those printed from the internet)		
Search/Open											
Client/Case											
Time Costing											v

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

		(0,000 Sect (21 - 0)) = # *	Kayboak Cale Manganant Inn. Owned. With 1991	(%, (and fame) (34 + 0) = 1
en Can Republic en rear lance en r	A. Marka Ray Andrew Marka Ray Andr	Not many transmission of the second		
Tasta Tasta Tasta/Ques			V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V         V	and a second sec
			Time College	

#### **Client Records**

Documents related to the client rather than to a specific matter can be added here e.g. a Service Level Agreement. This will ensure visibility regardless of the matter selected. In order 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 I Open Atta Play Dictat	chment tion	Post Time Complete Print fault Actions		mplate)		Take Action	🕲 Save		
General F Action State	Properties us NA	Attachment/C	Documents	Action Ass		Other Notes			
Publish	h Only : Only				iority ) High ( Normal ) Low ther Proper [ Milestone [ Complete ] Billable ] Documen [ Know You	ts Processed		Category Cat	
								Photo ID     Non Photo ID	Ok Cancel

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

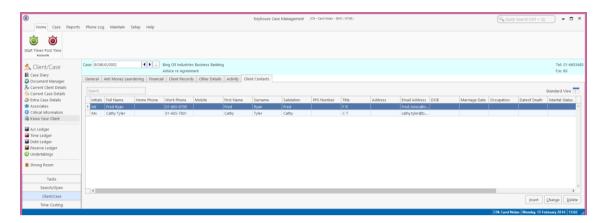
ö ö 🚽	• 🏂 💥 👻 📃					
art Timer Post Time Add Accounts	d Clear All Delete All Import Other Case Details					
Client/Case	Case: ABA001/0001	5				Tel: 01-29
Case Diary	Family Law					F/e: CN
Case Diary Document Manager	General Anti Money Laundering Financial Client Reco	ds Other Details A	tivity			
Current Client Details Current Case Details	Search					Standard View 🚺
Other Case Details	Other Documents	Matter	Date Entered	Fe	Handler	
Associates	Call from: David Abrahams Phone No: +353-87-8768108.	0001	27 Feb 2014	CN	BS	^
Critical Information						
Know Your Client						

#### **Other Details**

This screen shows client specific forms which are made up of UDF Fields. These forms hold information about the client that is not stored in other locations e.g. Credit Rating. To create a Client Other Details form see the Administrator User Manual.

#### **Client Contacts**

This screen will give all contact information for the Client pulled from all matters.



# **Chapter 7: Keyhouse Capture**

# How to Capture a Folder

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



2. Click Select Folder. The Capture Documents screen will appear.

1			Keyhouse -	Cap	ture Documents 📃 🗖 🗙
Options					^ 🖉 🖮 🐚 🍸
	eate New Case rtcut Wizard				
Select documents to capture					Preview Panel
Search					
File Name	Class	Type	Modified		AFFIDAVIT OF FIONA CASSIDY
keyhouse			02/11/20	^	(liberty to enter final judgment)
▶ 🗌 🛅 Sale			02/11/20		
🔺 🗌 🚞 SQL Server Management Stud	io		03/11/20		I, FIONA CASSIDY, Manager, Bank of Ireland Mortgages, New
Backup Files			03/11/20		Century House, Mayor Street Lower, IFSC, in the City of Dublin aged
Code Snippets			22/10/20		18 years and upwards MAKE OATH AND SAY as follows:-
Projects			22/10/20		To yours and upwards marke OATT AND OAT as follows."
Settings			22/10/20		
Templates			22/10/20		1. I am employed by the Plaintiff as a Manager of the Legal Team in
🔺 🗌 🗁 Visual Studio 2005			22/10/20		the Mortgage Arrears Support Division and I am duly authorised by
Projects			22/10/20		the Plaintiff to make this Affidavit for it and on its behalf, and I do so
Templates			22/10/20		from my own knowledge and from a diligent perusal of the
🔺 🗌 🗁 Visual Studio 2008			22/10/20		Plaintiff's books and records, save as where otherwise appears
Templates	N8.		22/10/20		and where so otherwise appearing I believe to be true and
v 🗋 aug		.TXT.	20/09/20		accurate. Such statements herein as relate to my own acts and
Default		.RDP	22/10/20		deeds I say are true and such statements herein as relate to the
desktop		JNI	23/08/20		acts and deeds of any other person, I say and believe are true.
expenses		.RTF	26/08/20		2. I beg to refer to the pleadings and proceedings already had herein
<ul> <li>JPAB08A Grounding Affidavit(</li> </ul>	Sin	.DOCX	26/10/20		when produced. I make this Affidavit for the purpose of grounding
Sept		.TXT	09/10/20	~	an application on behalf of the Plaintiff for liberty to enter final
	Tota	size of chec	ked files: 0 Bytes	s	judgment against the Defendant.

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

Detions			Keyhouse -	Capt	ure Documents	-	× =
2 🖬 💁 🍸 🙁 🔞	e New Case						
Select documents to capture					Preview Panel		1
Search							
File Name	Class	Type	Modified				
🔺 🗹 🚞 General Office Work			03/11/20	^			
Csmexp		.TPS	11/09/20		Our Ref: [MAT:FECode]/[MAT:Code]	Your	Ref:
GEN01A Attendance Sheet		.DOC	18/01/20		Our Ref: [MAT:FECode]/[MAT:Code]	Your	DATE:
GEN04 Letter to Lending Ins		.DOC	18/01/20		Today]		[DATE.
GEN05 Letter to Local Author		.DOC	18/01/20		1044)]		
GEN08 Letter to Doctor		.DOC	18/01/20				
GEN09 Letter to Insurance C		.DOC	18/01/20		[CAN:Name.Doctors#??]		
General Office Work Action		.DOC	11/09/20		[CAN:Address.Doctors#??]		
GENG02A Letter to Client		.DOC	18/01/20				
GENG03A Letter to Solicitor		.DOC	18/01/20				
GENG06A Blank Document		.DOC	18/01/20				
GENG07 Letter to Barrister		.DOC	18/01/20				
GENG11D Blank Document		.DOC	24/08/20		Re: Our client: [CNT:Name] of [CNT:LinearAddre		
GENG12A Blank Letter		.DOC	18/01/20		Date of Birth: [CNT:DOB]		
GENG20A Attendance Sheet		.DOC	21/02/20				
GENG25A Memo		.DOC	24/08/20				
GENG29A Letter to Client Co		.DOC	24/08/20		Dear [CAN:Salut.Doctors#??]		
				~			
	Tot	tal size of chec	ked files: 0 Bytes				

# Tip: To filter a column heading: Move your cursor over the column heading a pin will appear. Click on the Pin for a list of filters available. Select the required filter.

• Click **Remove filter** on the Options tab to display all documents.



**Tip**: To exclude a file remove the tick.

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

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

_		Assign checked docume	nts to Cas	se/Ma	tter	×
	Case/Matter	BLA001/0002				
	Handler	Admin	~			
	Action Code					
3	Document Class	Please select a document class	~			
	Assign Date	Please select a date	$\sim$	[OR]	✓ Use file date	
	Diary Description					
		Note: Leave description blank to use docume	nt name as t	he desc	ription	
	Capture settings	Remove captured documents from origina			Import documents to a	single action
		Set captured document as complete			Set action as generated	ł
	Save Settings				Ok	Cancel

- Case The Case will default to the current case. To select a different case, click the browse button; this will bring up a matter list. Select the required case. Handler The Handler will default to the current handler; select an alternative from the drop-down list, if required.
- Action Click the browse button for a list of incoming actions will appear. **Select** the required action.
- Description Input a **description** in the Description box; if you leave this blank the document name will become the description.

Capture Settings Check the boxes as appropriate to:

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

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

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

#### How to Capture a File

- Click **Capture** on the Home tab in either the Case Diary or Task List. The following screen will appear.
- 2. Click Select File.
- 3. A Windows **Open** dialogue box will appear. Browse and locate the file that is to be captured.

Select Select Assign Filtered Remove Create File Folder Docs Docs filter Shortcut	New Case Wizard				✓ ×	
Capture Document Options	Wizard		Last	Selected Folder Path	* ^	
Select documents to capture					Preview Panel	
Search						
File Name	Class	Type	Modified			
# Scanned History			24 Jun 20	^		
20090720sharpscanner@key		.PDF	19 May 2			
Sharpscanner-2237		.PDF	18 Jun 20			
sharpscanner@keyhouse.ie		.PDF	29 May 2			
sharpscanner@keyhouse.ie		.PDF	13 Feb 20			
sharpscanner@keyhouse.ie		.PDF	19 May 2			
sharpscanner@keyhouse.ie,		.PDF	29 May 2			
sharpscanner@keyhouse.ie		.PDF	19 May 2			
sharpscanner@keyhouse.ie,		.PDF	09 Jun 20			
sharpscanner@keyhouse.ie		.PDF	19 Jun 20			
20090sharpscanner@keyhouse.ie		.PDF	16 Feb 20.			
sharpscanner@keyhouse.ie_20090		.PDF	16 Feb 20.			
sharpscanner@keyhouse.ie_201		.PDF	16 Feb 20			
sharpscanner@keyhouse.ie_2012		.PDF	16 Feb 20.			

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

Capture

- 5. Tag the document to be captured. There will be a Preview of the document in the Preview Panel, on the right of the window.
- 6. If the document is to be captured into a new case use the **New Case Wizard** (on the right of the Options tab) to set up the case first. For further information on how to create a new case see Chapter 3.

		Keyhouse -	Capture Docur	ments		_ = >	×
Options						- A 🕜 🖬 🚰 🍸	΄ 🕄
Select Select Assign Filtered Remove Create New	T:\Scanned [	Documents					
2	izard	Last S	elected Folder		✓ X		
Select documents to capture					Preview Panel		щ
Search			N:\Art\W	/orkflow documents\Prope	rty Purchase.pdf		
File Name Class	Туре				act which you will sign is an Agreen ance with agreed plans and specification		^
Property Purchase	,PDF	13 Dec 20		Booking Deposity you han it is important that you an the Solicitors for the sells In the event that you are it will be nacessary for y raise the funds. 3 Loan Offer: As I have : you commit yourself un Accordingly, prior to e satisfactory letter of loan are in a position to comp offer as your lender w Obviously, in the event	► O O O O O O O O O O O O O O O O O O O	wingly, on signing Contracts ebank draft made payable to ase advise me immediately as itution for a bridging loan to ract to purchase this property, and pay the purchase price. Jud ensure that you have a un should also ensure that you and requirements of any loan i conditions have been met.	
			~	Institution wall require y Protection Insurance for release funds until such commit yourself to a legy position to obtain Life lending institution on su in processing applicant substantially in recent th completed by your Gene may elect to have you un		or Life Assurance/Lorgzage e Lending Institution will not ex. Accordingly, before you hould ensure that you are in a to the satisfaction of your the amount of time involved chin. Cover has increased equire that questionnaires be l Assessment Forms) or they see factors, I recommend that	

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

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

#### Provide the following information:

Case	The Case will default to the current case. To select a different case, click
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:
	<ul> <li>delete the Captured documents from original location;</li> </ul>
	<ul> <li>import documents to a single action (the alternative is that each document will get its individual action in the case diary);</li> </ul>
	<ul> <li>mark as complete the action into which the document is to be captured;</li> </ul>

• mark the document as having been generated.

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

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

# **Chapter 8: 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 Report	s Phone Log Maintain Setup	Help			
New Case Copy Case Mov Case maintenar		р 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
Wy Cheques	Circuit Court	LIT090	Ltr Serving Motion on Def	LTR	Letters/Interparty Correspondance
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	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 eg. Work Flow

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



Work Flow 9

5

#### How to apply a filter

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

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

۶.	Clear Filter	Ν
· · · ·		ar

# **Chapter 9: Conflict Search**

# What is a Conflict Search?

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

# How to do a Conflict Search

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

	e Case Merge Case	Conflict Search			
Case maintenan	Search	Case related GOTO	·		
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
		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
1 minut	and	- Manual -	- Marine	~~~ Chim	and the second s

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



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

Conflict of Interest Search
Search Nemes

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

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

Stephen Keogh	
2134590P	
"Keogh Holdings"	•

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

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

67	Conflict of Interest Search				
	Case: BOU001/0001 - Claire Bo Save	urke/Personal	Injury at work	Back – modify search	
	File <u>N</u> ame			🦳 🌄 Cancel	
	ConflictOfInterestReport_Stephen_I	<pre>(eogh_and_othe</pre>	rs		
Ð	🗎 🍓 -   🌍   🔶 🔶	1 / 3	ی ۲5% -	🖶 🔂 Find 🗸	
輕					
			Confli	ict of Interest Report	
		Case: BOU001	/0001 - Claire Bourke/Pers	sonal Injury at work	
		Searched r	name(s): Stephen H	Keogh Date:	10 July 2011
			2134590F		
			"Keogh H	oldings"	
			Confli	ict of Interest Report	
		Case: BOU001	/0001 - Claire Bourke/Pers		
		Capacity	Name	Other Details	
		Client	Stephen Keogh	Address: 3a Main Street, Bray, Co Wicklow Salutation: Stephen	
		Client	Stephen Keogh	Address: 1 Main Street, Dublin Principal: Stephen Keogh Salutation: Mr Keogh	
		Matter	IBS001/0008 International Business Services Ltd -v- Stephen Keogh	Address: Grange House, Baggot Street, Dublin 2. Client Name: International Business Services Ltd	
		Matter	IBS001/0015 Stephen Keogh	Address: Grange House, Baggot Street, Dublin 2. Client Name: International Business Services Ltd	

See the following example.

				Date	Time	Handler	Synopsis
►			0	10 Nov 2014	20:55	ADM	Conflict Search

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

- 8. Click on **Cancel** to cancel the search at any time. The following message prompt will appear.
  - a. To save click on **Save the Search Results.**
  - b. To discard click on **Discard the Search Results**.
  - c. Click **Cancel** to cancel this message prompt and return to the conflict of interest report.

-	0 0 - la la la la	
	Conflict of Interest Search	х
	The Conflict Search results have not been saved to the current Case Save the Search Results Discard the Search Results Cancel	<del>)</del> .

Search/Open

All Matters
 My Matters
 Recent Matters

Contacts
Associates

躸 Phone Log

Advanced Search
My Invoices
My Cheques

Firm Undertakings
 Strong Room
 Document Search

# **Chapter 10: The Strong Room**

# What is the Strong Room used for?

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

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

# How to Search for an Item

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

Search/Open	Search						Standard View
All Matters	Item Code	Matter Code	<ul> <li>Item Type</li> </ul>	Item Description	Status	Open/Closed	Destroy Date
My Matters	0000123131	TJF001/0001	DEE	TJ Fox/Outstanding debt to PTS8 Bank.	1	0	
	DEE	TAR001/0001	DEE	George Tarrant/Deeds for Commerical Premises	1	0	30 Jun 2014
Recent Matters	0000123128	RYA002/0001	WIL	Margaret Ryan/Will which included additions for beneficaries	1		18 Jun 2014
Contacts	test	OWE001/0001	DEE	Peter Owen/Test Deeds for Section 23 Property	1	0	30 Jun 2014
Associates	FLY001/101	FLY001/0001	DEE	Jack Flynn/Deeds for house at 4 The Mews, Rathfarnham.	1	0	
Advanced Search	FLY001/100	FLY001/0001	сом	Jack Flynn/Company Seal for Flynn & Co	1	0	31 Dec 2015
My Invoices	0000123126	FEN001/0001	WIL	Richard Fennell/Will	1		18 Jun 2014
My Cheques	LEA1811	EVE001/0003	LEA	Ever Green Insurance Corporation/Leasehold Agreeement for Turf Rights	1	0	18 Jun 2014
Phone Log	D1234	CUL001/0001	DEE	Ann Marie Cullen/Deeds for 101 Dun Emer Drive, Dublin 6	1		30 Aug 2014
Firm Undertakings	CDA1111	ABB001/0004	DEE	George J Abbott/Title Deeds - Code CDA 1111	1	0	08 Aug 2014
Strong Room	ABB001000	ABB001/0001	DEE	George J Abbott/Title Deeds for second property	لم.	°	18 Jun 2014

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

3

George	8					Standard View
Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date
ABC000			George J Abbott/Personal Papers			
DEE	TAR001/0001	DEE	George Tarrant/Deeds for Commerical Premises	1	0	30 Jun 2014
ABB0010001	ABB001/0001	DEE	George J Abbott/Title Deeds for second property	1	0	18 Jun 2014
CDA1111	ABB001/0004	DEE	George J Abbott/Title Deeds - Code CDA 1111	1	0	08 Aug 2014

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

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

# How to Add a File/Item to the Strong Room

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

Fields marked with an asterisk are required.

<b>Needs Attention</b>	Tick if the item needs to be		Strong roo	m - Add new File		×
	checked.	General Item	Diary Client Info			
Item Type	Select the Item Type from the					IN
	drop-down list.			Item Code *	Enter item code	
Item Code	Input an item Code or if left	Client Name	BAR002	Description		ls, Co Meath
	black, the system will	Description *	Sale of 1 High Street, Kells, Co Meath			
	generate a code.					
Client Code	See also Matter Code below.	<pre>image: image: imag</pre>				
Matter Code	If the code of the current	Search Code	Enter search code	Fee Earner	Carol Nolan	~
	matter is not displayed, or you			Destroy Date	Disease and and share	
	wish to select a different		Please select date		Please select date	
	matter, use the browse	● Open ○ O	Closed			
	button to browse the matter					QK Cancel
	list.					
Description	Input a description of the item.					
Location	Select a storage location from the	e drop-o	lown list.			
Box No	Likewise, select a Box number fro	om the o	drop-down list.			
Search Code	Input a search code					
Fee Earner	Use the drop-down list to select t	the Fee	Earner with respo	nsibility	y for the ite	m.
Entry Date	The date on which the item was e					
, Destroy Date	The date, if any, on which the ite		•	,	,	
Open/Closed	This will <b>default</b> to open.		,			

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

(	Stro	ng room - Add new File	x	1	١	PARTIN.	Strong roo	m - Add new File		×
	Genera Deeds Rem Diary Client Info				General Wills	In 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	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**

1. Click to the Deeds tab.

			Strong room - Add new File		×
General Deeds	Item Diary	Client Info			
Deeds Address	Enter the add	ress		Accountable Trus	t Receipt
Property Owner	Enter the proc	perty's Owner			
				QK	Cancel

- 2. Enter the address for the Deeds.
- 3. If the Deeds are being held on Accountable Trust Receipt, tick the Box.

			Strong room - Add new File	×
General Deeds	Item Diary	Client Info		
Deeds Address	Enter the add	ress		Accountable Trust Receipt
Date	Please select (	date 💌	Due Date Please select date	
Comment	Enter the com	iment		
Property Owner	Enter the prop	perty's Owner		
From Whom	Select From V	Vhom		V
	Enter From W	hom		
To Whom	Select To Who	om		¥
	Enter To Who	m		
				QK Cancel

- 4. Enter the required information.
- 5. Click OK.

# **Entering Wills**

1. Click to the Wills tab.

			Strong room - A	add new File	2	
General Wil	Is Item Diary	Client Info				
Testator	Enter the test	ator		Executor 1	Enter the executor 1	
Enter the test	ator address			Enter the e	xecutor 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	date	~			
					Enter the executor 3 xecutor 3 address	
					Enter the executor 4	
				Enter the e	xecutor 4 address	
						QK Cance

- 2. Enter the Testator and the Executors and the date of the Will.
- 3. It is also possible to enter the value of the Estate.
- 4. The Date of death and the value of the estate can also be added.
- 5. Click OK.

# How to Withdraw an Item

- 6. Open the **Strong Room** screen, search for and select the item you want to withdraw.
- 7. Click on the **Withdraw file** icon on the Home tab.
  - Note if the Withdraw file icon is greyed out the item is already checked out.
- 8. The system will ask for your **password**; input your **username** and **password**.
- 9. A Withdraw File dialogue box will appear.

Provide the following information:

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

	Strong Room - Withdraw File	×
If you	Confirm below, this item will be SIGNED OUT TO YOU!	
For Who*	Please select Fee Earner	~
- OR -	Withdraw Permanently	
Comments*		^
		~
	Confirm Withdraw	el
	Strong Room - Withdraw File	×
Vou wi	ll find Will of Kenneth Bunson at File Room, Box No: 4	
YOU WI	i ind will of kenneth burson at File Kooni, box No. 4	

- **Note** if you tick the Withdraw Permanently it will not be possible to replace the document. A new entry will need to be created.
  - Comment **Input** a comment, e.g. why the item is being withdrawn.
- **Note** the item will be signed out to you.
- 10. Click Confirm Withdrawal. The following screen will appear telling you where to find the item.
- 11. 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.
  - **Note** if the **Replace File** tool is greyed out the item is already checked in.
- 3. The following Replace File dialogue box will appear.
- 4. Select the physical location, e.g. Box 2, to which the item is being returned.
- 5. Click **OK**. You will see a message asking you to place the item in the selected location.
- 6. Click OK.

# Delete a file

- 1. Select the item to be deleted.
- 2. Select Delete File from the Ribbon at the top of the page.

# How to view the History on a file/item

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

<b>î</b>		S	trong Room - Replace File	×
Item Code	00	00012313	33	
Description	P	eter Tego	g/RTA on N4 at Lucan	
Client Code	TE	G001		
Location	Se	elect loca	ation	~
	[			Cancel
		Code	Location	Cancer
	F	BOX1	Box 1	^
	_	BOX2	Box 2	
		DUB	Dublin	
		OFF	Offsite	
	_	STR	File Room	
PI PI	lea:	se replace	Strong Room - Replace File e the item Will of Kenneth Bunson to B	X 30X2, Box No.4 Ok

Print Add File Chang	-	te File	Withdraw File F	lequest File His	tory Diary							
Search/Open	Search											Standard
	Attn	ATR	Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date			
All Matters	-		ABC000	ABB001/0001	Papers	George J Abbott/		operference				
My Matters		~	DEE	TAR001/0001	Deeds	George Tarrant/		0	30 Jun 2014			
Recent Matters			ABB0010001	A86001/0001	Deeds	George J Abbott/		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	Lease A	Ever Green Insur	1	0	18 Jun 2014			
Firm Undertakings			0000123124	AAA002/0002	Compan	AAA Worldwide	1		18 Jun 2014			
Strong Room			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	Compan	AAA Securities Lt	1		19 Jun 2014			
			0000123130			Year end backup			19 Jun 2014			
			CDA1111	A88001/0004	Deeds	George J Abbott/		0	08 Aug 2014			
			0000123131	BLA001/0001	Deeds	Gordon T. Black/	1	0				
	• <u>A</u>	1	0000123133	BAR002/0001	Deeds	Kevin Barrett/Sal	1	0				
		~	0000123134		Deeds	Jane Doe - Deeds	1	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 (Pg<u>157</u>).

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

	6		
		1	
1.12	- + -	_	

٦

)			Strong room - H	istory		
Ite	m History					
[	Who	ForWho	Out Date	Out Time	In Date	In Time
Þ	keyhouse	BS	27 Aug 2011	15:21:21	27 Aug 2011	15:21:37
	keyhouse	BS	27 Aug 2011	15:22:17	27 Aug 2011	15:22:29

5. Click Cancel to exit this screen.

Keyhouse

## Working with Documents Only

#### Add a file without using a Case

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



2. A list of all documents held not related to a specific case/client will be listed.

= 🕒	<u></u>		<u>i</u>	ia 🚺	2					
Print Add File Ch	hange File Dele Maintain Items	ete File	Withdraw File File		tory Diary Item History					
Search/Open	Search									Standard Vi
All Matters	Attn	ATR	Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date	
All Matters My Matters			ABC000	ABB001/0001	Papers	George J Abbott/	1			
Recent Matters		~	DEE	TAR001/0001	Deeds	George Tarrant/	1	0	30 Jun 2014	
Contacts			AB80010001	ABB001/0001	Deeds	George J Abbott/	1	0	18 Jun 2014	
Associates			12345			Friday 1 Backup	1	0	01 Jan 2020	
Advanced Search			AAA0010001	AAA001/0001	Wills	AAA Securities Lt	1	0	31 Oct 2014	
My Invoices			AAA0010001	AAA001/0001	Wills	AAA Securities Lt		0	31 Oct 2014	
My Cheques			123123	AAA001/0001		AAA Securities Lt		0		
Phone Log			test	OWE001/0001		Peter Owen/Test		0	30 Jun 2014	
Firm Undertakings			LEA1811	EVE001/0003		Ever Green Insur		0	18 Jun 2014	
Strong Room			0000123124	AAA002/0002		AAA Worldwide	1		18 Jun 2014	
Document Search	-		0000123125	AAA002/0002		AAA Worldwide			18 Jun 2014	
Template Library			0000123126 0000123127	FEN001/0001		Richard Fennell/ Year End Backup			18 Jun 2014 18 Jun 2014	
			D1234	CUL001/0001		Ann Marie Cullen			30 Aug 2014	
			0000123128	RYA002/0001		Margaret Ryan/			18 Jun 2014	
			0000123120	AAA001/0001		AAA Securities Lt			19 Jun 2014	
			0000123130	1001001		Year end backup			19 Jun 2014	
			CDA1111	A8B001/0004		George J Abbott/		0	08 Aug 2014	
			0000123131	BLA001/0001		Gordon T. Black/		0	-	
		1	0000123133	BAR002/0001	Deeds	Kevin Barrett/Sal	1	0		
		~	0000123134		Deeds	Jane Doe - Deeds	1	0		
			0000123135		Wills	Will for Jane Doe	1	0		

- 3. A list of all documents held not related to a specific case/client will be listed.
- 4. Complete the form as detailed in Add a file to a Case p. 94. However, you will not be able to add a Client/Matter details.

#### Keyhouse

Item Type *	Deeds	~	Item Code *	Enter item code	
	beeas				
Client Code	Select client code		Matter Code	Select matter code	¥
Client Name	Client Name		Description	Matter description	
Location	File Room	~	Box No	Enter box number	
Search Code	Enter search code		Fee Earner	Carol Nolan	~
Entry & Destro	by Date				
Entry Date	06 Aug 2015	~	Destroy Date	Please select date	~
● Open ○ C	losed				

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

ttn	ATR	Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date	
		ABC000	ABB001/0001	Papers	George J Abbott/Personal Papers	1			
	~	DEE	TAR001/0001	Deeds	George Tarrant/Deeds for Commerical Premises	1	0	30 Jun 2014	
		ABB0010001	ABB001/0001	Deeds	George J Abbott/Title Deeds for second property	1	0	18 Jun 2014	
		12345		Backup T	Friday 1 Backup	1	0	01 Jan 2020	
		AAA0010001	AAA001/0001	Wills	AAA Securities Ltd/My Will	1	0	31 Oct 2014	
		AAA0010001	AAA001/0001	Wills	AAA Securities Ltd/My Will	1	0	31 Oct 2014	
		123123	AAA001/0001	Wills	AAA Securities Ltd/My Will 2	0	0		
		test	OWE001/0001	Deeds	Peter Owen/Test Deeds for Section 23 Property	1	0	30 Jun 2014	
		LEA1811	EVE001/0003	Lease A	Ever Green Insurance Corporation/Leasehold Agreeement for Turf Rights	1	0	18 Jun 2014	
		0000123124	AAA002/0002	Compan	AAA Worldwide Removals/Company Seal	1		18 Jun 2014	
		0000123125	AAA002/0002	Papers	AAA Worldwide Removals/Student Complaint File	1		18 Jun 2014	
		0000123126	FEN001/0001	Wills	Richard Fennell/Will	1		18 Jun 2014	
		0000123127		Backup T	Year End Backup 2013 (SERVER01)	1		18 Jun 2014	
		D1234	CUL001/0001	Deeds	Ann Marie Cullen/Deeds for 101 Dun Emer Drive, Dublin 6	1		30 Aug 2014	
		0000123128	RYA002/0001	Wills	Margaret Ryan/Will which included additions for beneficaries	1		18 Jun 2014	
		0000123129	AAA001/0001	Compan	AAA Securities Ltd/Company Seal	1		19 Jun 2014	
		0000123130		Backup T	Year end backup 2011	1		19 Jun 2014	
		CDA1111	ABB001/0004	Deeds	George J Abbott/Title Deeds - Code CDA 1111	1	0	08 Aug 2014	
		0000123131	BLA001/0001	Deeds	Gordon T. Black/RTA Walkinstown Crossroads, G. Black	1	0		
	× .	0000123133	BAR002/0001	Deeds	Kevin Barrett/Sale of 1 High Street, Kells, Co Meath	1	0		
	1	0000123134		Deers	Jane Doe - Deeds	1	0		
		0000123135	$\sim$	wills	Will for Jane Doe - Executed 1/12/15		0		
		0000123136		Deeds	Mr Joe Bloggs	1	0		

- 6. It is also possible to see if the document are in or out the Strong Room.
  - Note: The process for withdrawing (p. Error! Bookmark not defined.) and Viewing the History of a document (p. **158**) is the same as the process already detailed.

# **Chapter 11: 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.



Both tools can be found on the Home tab.

									Keyhouse Case Management
Home Case Reports	Ph	one L	og	Main	tain	Setup Help			
New Item - Print - Captur	re Ger	nerate Docu		plete	Actio	n Start Timer Po		)	
Client/Case	Case	e: TJF	001/0	001			TJ Fox		
Case Diary							Outstan	ding debt to I	PTSB Bank.
🕅 Document Manager & Current Client Details		5	Searc	h					
Current Case Details	Action					Date	Time	Handler	Synopsis
Other Case Details	9	₽				14 Jul 2015	17:16	ADM	Precedent Document
Associates		₽				14 Jul 2015	16:44	ADM	Attendance Sheet
Critical Information		₽				14 Jul 2015	15:52	CN	Create Vendor Instruction Sheet
				¥.		13 Jul 2015	15:10	CN	Document2_2661_2662
📱 A/c Ledger		Ħ				06 Jul 2015	09:58	СОМ	Conflict Search
📱 Time Ledger		•				16 Jul 2015	15:48	CN	Email To:training TT. training - Test Attachment
🙀 Debt Ledger		•				13 Jul 2015	12:49	CN	Email To:Brenda Hartley - Outgoing Email.
📱 Reserve Ledger		•			0	13 Jul 2015	12:35	CN	Email To:Brenda Hartley - Outgoing Email with an Attachm
Undertakings		•				06 Jul 2015	11:14	CN	Draft Bill Draft Bill No: 286
		•	0	!		06 Jul 2015	10:23	МК	Pass on Deeds once House is sold.

00:00:53

#### How to Record Time Using the Timer

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

ABA001/0002

- 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.



A 🗹 🚽 📥 🔍 🗙

- 5. To resume recording, click on the clock the clock will continue recording.
- 6. To move to another case in the case diary, search and open the case in the normal way. The timer will automatically pause the current time recording and create a new time recording for the new case and start the clock.
  - Note If you return to a previous case in your timer list the timer will continue the previous time recording for this case.

FLY001/0002				00:04:08	A 🗹 音 🕨		x
Matter Code		Time	Client Name	Matter Details	Comment	Date	
TJF001/0001	 <b>(</b>	00:30	TJ Fox	TJ Fox Outstanding debt	Dictation	27 Ju	^
TJF001/0001	 <b>(</b>	02:00	TJ Fox	TJ Fox Outstanding debt	General Advi	27 Ju	
ABA001/0002	 ۲	00:03	David Abr	David Abrahams HIPS N		04 A	
FLY001/0002	 <b>(</b>	00:04	Jack Flynn	Jack Flynn Purchase of 1		04 A	

- 7. To expand the timer click on Maximise.
- 8. To recommence a time recording for an entry already listed in your timer click on entry already listed in your timer click on local next to case code.
  - **Note** if open the case in the case diary the timer will automatically recommence the active time recording for this case.
  - **Note** the entry highlighted in **Green** is the active time recording.
  - **Note** the A button will ensure the timer turns on automatically when you open Keyhouse

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

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

#### How to Post Time from the Timer

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

	FLY001/0002				00:17:02	A 🗹 音 🕨		×
	Matter Code		Time	Client Name	Matter Details	Comment	Date	
	TJF001/0001	 <b>(</b>	00:30	TJ Fox	TJ Fox Outstanding debt	Dictation	27 Ju	^
Þ	TJF001/0001	 <b>(</b>	02:00	TJ Fox	TJ Fox Outstanding debt	General Advi	27 Ju	
	ABA001/0002	 ۹	00:03	David Abr	David Abrahams HIPS N		04 A	
	FLY001/0002	 <b>(</b>	00:17	Jack Flynn	Jack Flynn Purchase of 1		04 A	

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

Matter:		ase is automatically displayed. Click the <b>Select Matter</b> tter list and select a different case if required.
Date:	By default, the date the tir	me was recorded will be shown. Change if required.
Time/Charge	Use the <b>option buttons</b> to basis of time spent or as a set charge.	e select whether this entry should be charged on the
Minutes/Hours/Days:	This will show the time recorded and can be amended if required.	TJFox Select Matter TJ Fox Select Matter Outstanding debt to PTSB Bank. Administration Time Time Recorder Carol Nolan U Date 27 Jul 2015 V
Hourly Rate:	The hourly rate will display the <b>default rate</b> for this handler and case.	Time Minutes 33.00 0 Units 5.50 Hours 0:33 0 Days 0.07 0 Time/Charge Time Charge Hours Rate Charge 0.5500 X 150.00 = 82.50 Is Chargeable Task Dictation V Narrative
Chargeable:	Check the box if this time is chargeable or uncheck it if it is not. By default, the box will be checked.	Save Save & Einish Cancel
Task:	Use the <b>drop-down</b> arrow	to select from a list of tasks.

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

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

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

#### How to Record and Post Admin Time Using the Timer

- 1. Open a Case in the Case Diary
- 2. Click **Start Timer** on the Home tab. The following timer will appear displaying the current case reference.
- 3. The clock will automatically start recording.
- 4. To pause recording click on the clock. By putting a tick in the box, the clock will follow you from case to case, starting a new clock on each case.
- 5. Expand the timer by clicking on Maximise.
- 6. Select the required timer.
- 5. **Double click** the entry to amend, the following screen will appear.

		Time			3
ISB Bank.					Select Matter
Carol Nolan	<b>v</b> [				
27 Jul 2015	~				
Minutes	33.00 🗘 🔿 Units	5.50 🗘 🔿 Hour	s 0:33	C Days	0.07 🗘
Time      Charg	je				
Hours	Rate	Charge			
0.5500	X 150.00	=	82.50 🔽	s Chargeable	
Dictation	~				Narrative
	Carol Nolan 27 Jul 2015 Minutes Time O Charg Hours 0.5500	Carol Nolan V 27 Jul 2015 V @ Minutes 33.00 0 Units @ Time 0 Charge Hours Rate 0.5500 X 150.00	Carol Nolan         v           27 Jul 2015         v <ul> <li>Minutes</li> <li>33.00 0</li> <li>Units</li> <li>5.50 0</li> <li>Hours</li> <li>Rate</li> <li>Charge</li> </ul> Hours         Rate         Charge           0.5500         X         150.00         =	Carol Nolan         v           27 Jul 2015         v                Minutes         33.00 (2) Units         5.50 (2) Hours 0:33                 Time Charge          Hours         Rate         Charge                Hours         X         150.00         E2.50 (2)         v	Carol Nolan

	-						
Administration Time Non Chargeable Code		¥					
Time Recorder	Carol Nolan	v					
Date	23 Oct 2014	~					
Time	Minutes 35.00	C Units	5.83	0 Hours	0.58	0 O Days	0.08 🗘

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

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

- 7. Save the changes.
- 8. The timer will automatically restart.
- 9. To amend, double click the entry in the Timer and amend the following details as required.

Comment	Input a narrative to describe the time entry
Non- Chargeable Code	Select from the drop-down list to change the non-chargeable code.
Minutes/Hours/Days:	This will show the time recorded and may be amended if required.
Date	Today's date will be shown by default; amend if required.

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





ABA001/0002

ABA001/0003

00:00:04 🗛 🗆 🚣 🕂 🔍 🗙

00:00:02 🔺 🗌 👱 🕂 🔍 🗙

🗹 🕹 🛉 💽 🗙

00:00:36

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

#### How to create an Empty Timer

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

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

1	Home	Case	Reports	Phone Log	Maintain	Setup
		Č.	Ö	0	5	$\bigcirc$
Print	Ne	w Time S	Slip Start Tir		c Timer Post	t Day Book
	=	Home Print Ne	i i i i i i i i i i i i i i i i i i i	ė š	🚔 🤄 🙆	Print New Time Slip Start Timer Start Blank Timer Pos

- 2. To pause the timer click on the clock.
- **NOTE:** It is also possible to start a new timer in an existing case.
- 3. Click on the Start timer tool on the Home tab. The current case will automatically be selected. This may have to be deleted.
- 4. Click on the Green Plus to add an empty timer.
- 5. Click on clock to start the timer.
- 6. To amend the entry, expand the timer by clicking on Maximise.
- 7. **Double click** the entry to add details for posting. This will bring up the Post Time dialogue box (see How to Post Time from the Timer, p. 103 above), but without a matter code.

, Image: the second sec	Post Time	×
Click here to select matter		Select Matter
Administration Time		
Time Recorder Carol Nolan		

8. 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 timings recorded but can be amended if required
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.
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

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

#### How to create a manual time slip

١	Post Time 🗖 🗙
FLY001/0001	Select Matter
Jack Flynn Sale of 10 Rose Lawn,	Blanchardstown, Dublin 17
Administration Time	
Time Recorder	Carol Nolan 🔍 🗌 Retain selected Time Recorder
Date	03 Mar 2016
Time	<ul> <li>○ Minutes</li> <li>0 ♀</li> <li>○ Units</li> <li>0.00 ♀</li> <li>○ Hours</li> <li>0:00 ♀</li> <li>○ Days</li> <li>0.00 ♀</li> </ul>
Time/Charge	● Time ○ Charge
	Hours Rate Charge
	0.0000 X 150.00 = 0.00 V Is Chargeable
Task	Select a task Suggested Narrative
	Save And NewSaveSave & EinishCancel
<b>Open</b> a Case in the	Case Diary

- 2. Click on **Post time** on the Home tab to open a Time slip.
- 3. Input or Amend the following details

1.

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 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 drop down arrow to reveal a list of tasks. Click the task required.
Comment	Input a narrative to describe the time entry

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

#### How 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
Administration Time	
Non Chargeable Code	Select non chargeable code
Time Recorder	Carol Nolan 🔍 🗆 Retain selected Time Recorder
Date	03 Mar 2016
Time	O Minutes         O ♀         O □         ●         Hours         0:00         ♀         O □         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         0.00         ♀         ♀         0.00         ♀         ♀         0.00         ♀         ♀         ♀         ♀         ♀         ♀         ♀         ◊         <
Time/Charge	Hours Rate Charge
	0.0000 X 150.00 = 0.00 ✓ Is Chargeable
	Suggested Narrative
	Save And New     Save     Save & Einish     Cancel
	Save time entry and

#### 4. Add the following details:

Date

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

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

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

Comment

Input a narrative to describe the time entry

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.

0

### How to View the Day Book from the Timer

- 1. Open the Timer
- 2. Click on **View A**ll on the timer tool bar.
- 3. The Day book will appear.

i 🍳 🤇	ts Phone Log Maintain Setup					
	Ð 🍯 🌑					
New Time Slip Start	t Timer Start Blank Timer Post Day Bool Day book	k				
ime Costing	Day Book Summary					
Day Book	Chargeable 09:06 Non-Chargea	ble 00:00 Total 09:06	Remaining 00:00		Handler Carol Nolan	
e Report	Date Matter Code	Client Name	Matter Details	Comment	Case Time	Charge
WIP by Bill Date	27 Jul 2015 TJF001/0001	TJ Fox	TJ Fox Outstanding debt to PTSB Bank.	Demand & Draft Proceedings	00:01	
Top WIP hboard	27 Jul 2015 TJF001/0001	TJ Fox	TJ Fox Outstanding debt to PTS8 Bank.	General Advice	00:30	7
shboard	27 Jul 2015 TJF001/0001	TJ Fox	TJ Fox Outstanding debt to PTSB Bank.	Court Attendance	01:00	15
	27 Jul 2015 TJF001/0001	TJ Fox	TJ Fox Outstanding debt to PTSB Bank.	Dictation	00:30	7
	27 Jul 2015 TJF001/0001	TJ Fox	TJ Fox Outstanding debt to PTS8 Bank.	General Advice	02:00	30
	31 Jul 2015				00:01	
	31 Jul 2015				00:01	
	31 Jul 2015				05:03	
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 headings to sort by that heading, e.g. Matter Code

#### How create a Time slip in the Day Book

1. Click on **New Time Slip** on Home Tab in **My Day Book**. The familiar Post Time dialogue box (see How to create a manual time slip, p. 106 above) will appear.

- 2. Provide details such as the matter, date, time, task etc. For further information see the section on How to create a manual time slip, p. 106 above.
- 3. When all details have been entered click **Save**. The time slip will appear in the Daybook ready for posting.

## How to create an Admin Time slip in the Day Book

- 1. Click on New Time Slip on the Home tab in My Day Book. The Post Time dialogue box will appear.
- 2. Check the Administration Time box. The screen will change to display the options for Administration time (see How create an Admin Time slip, p. 107 above).
- 3. Complete the details of Date, Time, Non-Chargeable Code and Comment as above, How create an Admin Time slip, p. 107.
- 4. Click on Save and Finish. This time entry is then added to the daybook ready for posting to time ledger.

## How to amend a Time Slip

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

## How to Delete a Time Slip

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

#### How to Post the Day Book

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



# **Accessing the Time Ledger Screen**

## Viewing the time Ledger

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

Home Case Report	s Phone Log Maintain	Setup Help							(	
Print - Start Timer Post Tin	Draft Invoice	Guide								
A Client/Case	Case: ABB001/0004	George J Abbott								Tel: 01-56
		Remortgage 44 Main Street								F/e: JP
Case Diary										
💋 Document Manager 🚴 Current Client Details	Date	Comment	Time or Charge	Time	C/N-C	Charged	Billed Amount	Invoice No	Task	T/R
🍝 Current Case Details	22 May 2008	Billed Fees: 0.00	Bill	0	Chargeable	0.00	0.00	45345	BILLED	Justin Phelan
🎒 Other Case Details	22 May 2008	Billed Fees: 1230.00	Bill	0	Chargeable	(7,715.00)	0.00	54	BILLED	Justin Phelan
🕾 Associates	09 Feb 2009	Client Meeting	Time	19	Chargeable	96.00	96.00	7	MEET	Justin Phelan
Oritical Information	19 Mar 2009	Legal Letter	Time	19	Chargeable	96.00	96.00	7	Letter Drafting	Justin Phelan
	14 Apr 2009	Document Drafting - lease of easment	Time	65	Chargeable	324.00	324.00	7	Document Drafting	Justin Phelan
📓 A/c Ledger	14 Apr 2009	General drafting Lease of Easements	Time	82	Chargeable	411.00	411.00	7	Document Drafting	Justin Phelan
🙀 Time Ledger	15 May 2009	Attendance	Time	40	Chargeable	201.00	201.00	7	Attendance	Justin Phelan
🙀 Debt Ledger	17 Aug 2009	Research & 2 letters	Time	67	Chargeable	336.00	336.00	7	Research	Justin Phelan
Reserve Ledger	24 Aug 2009	Telephone Attendance	Time	11	Chargeable	54.00	54.00	7	TEL	Justin Phelan
Undertakings	02 Sep 2009	Reading in	Time	10	Chargeable	68.00	68.00	7	EMA	Justin Phelan
· · ·	07 Sep 2009	Various Work-review of file, calculation of pe	Time	52	Non Chargeable	261.00	261.00	7	File Review	Stephen Keogh
Strong Room	07 Sep 2009	Various Work-review of file and dictation me	Time	36	Non Chargeable	180.00	180.00	7	File Review	Stephen Keogh
	10 Sep 2009	Drafting Documents	Time	30	Chargeable	145.00	145.00	7	Document Drafting	Carol Nolan
	14 Sep 2009	New Company Formation, Draft SHA for New	Time	255	Chargeable	1,062.50	1,062.50	7	File Review	Justin Phelan
	11 Oct 2009	File Review	Time	19	Chargeable	96.00	96.00	7	File Review	Justin Phelan
	10 Feb 2010	Billed Fees: 0.00	Bill	0	Chargeable	(3,666.19)	0.00	7	BILLED	Justin Phelan



 $\overset{\circ}{\mathbb{V}}$  Tip: Click on a column headings to sort by that heading e.g. T/R (Time Recorder).

 $^{rac{M}{2}}$  Tip: you can also Start the timer and create a time slip using the Home tab on this screen. See the previous sections for further details on how to record and post time.

## How to Create a Draft Invoice from the Time Ledger Screen

- 1. **Open** a case in the Case Diary.
- 2. Click on Time Ledger on the Case Diary Navigation panel.
- 3. Click on **Draft Invoice** on the Home tab. The following Draft Invoice will appear.
  - **Note**: The current balances on the matter are displayed on the right of the screen.

Client

		[	Draft Invoice				□ ×
V Ok	Message:						
Cancel	Request Type: O C	edit Note	🗌 Open Inv	roice 🗌 Bill S	ent Invo	oice / Bill No: (not	t invoiced)
	Matter Details —						
	Matter	FLY001/0002	∎ Ja	ck Flynn		Bills:	0.00
	Fee Earner:	Carol Nolan	Outlay:	0.00			
	Description: Purchase of 16 The Haywain, Terenure, Dublin 6					Client:	0.00
Choose report	Date	07 Aug 2015	🖞 🗌 Transfer To	o Pay		Charges: Time (HH:MM):	7:21
Bill Layout	Bill To: Jack Flynn 4 The Mews				Time (FFF.WIWI).	7.21	
Print Copy		Rathfarnham					
	Client Our Ref:	Client Dublin 6a					
	Our Ret	CN	Your Ref:				
	Write down Time to:	07 Aug 2015	•				
	Invoice Details Fee	Earner Breakdown					
	Type Narrative	2	1	let	VAT Value Fee	Earner	
Release							^
Notify Release Inv							
Create FNL							
		Ri	ght-Clic	k for Opt	ions		
Billing Guide							
Billing Guide							
Matter Ledger	Fees: 0.00 Outlay:	0.00 Miscellaneous Fees:	0.00 VAT: 0.0	D		Bill To	vtal: 0.00
Requested By: Carol Nola	n Draft Number: (new)						

Message	<b>Input</b> a message for the account department (optional)	
in coouge	input a message for the account acpartment (optional)	

Туре	Invoice will be checked by default. Select Credit Note if required.
------	---------------------------------------------------------------------

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

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

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

ii)



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

The options for grouping time are:

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

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

The options for grouping outlay are similar:

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

7	Billing	Guide Wizard															
ľ	년 🔶 🖻	ack															
					Matter: FLY	001/0002 - Jack Flynn/Pu	urchase of 16 The Haywain, 1	Terenure,	Г								
1	Time to: Fri	day 31 July 201		Outlay to: Monda	ay 01 January 1900		Draft No:	287					Soo Grabb	it & Runne			
	Items												VAT No:8	746675DD			
	° Action	° Туре	<sup>®</sup> Matter	<sup>®</sup> Handler	<sup>®</sup> Outlay	Description	<sup>®</sup> Outstanding	BillNow	1								
	📋 Bill Partial	ly F	FLY001/000	12 CN	1	fotal Fees	1,102.5	0 952.50									7/08/2015
ł															In	voice No: (	
										Jack Flynn					0	urRef: F	LY001/0002
1										4 The Mews							
1										Rathfarnham Dublin 6a	n						
										Date	Billing Descriptio	n		Time	Net Fees	VAT Amount @ 23%	N et Outlay
										OurRef FLY001/0002	YourRef						
													e of 16 The Haywain, Te				
											Demand & Draft P Attendance	roceedings		00:50 00:30	125.00 75.00	28.75 17.25	
1											Demand & Draft P	roceedings		03:01	452.50	104.08	
										03/07/2015	Court Attendance			02:00	300.00	69.00	
1										BGDetai	ILDATE (DateTime)		Matter Totals:	06:21	952.50	219.08	0.00
	•			11					-				Net Grand Totals:	06:21	952.50	219.08	0.00
							Total Fees:	952.50									
1							Total Outlay:		L L								
							Grand Total:	952.50									
I							Refresh Ok	Add to Invoice	2								
ľ																	

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

This example shows no Grouping on either fees or outlays

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

#### How to Partially Bill an Item

- Double-click the item to be changed:
- Click the figure in the Bill Now column and change the amount. Bill Partially 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.
  - $\equiv$ Tip to exclude more than one item hold down the CTRL key on your keyboard and click on each of the items.

Handler <sup>©</sup> Outlay

BS

<sup>e</sup> Matter

GLE001/0001

Туре

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

#### **To Add Grouping Levels**

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

Time to: Friday	31 July 201	5 Out	lay to: Monday 01 Janua	ter: FLY001/0002 - Jack Flynn/Purchase ( ary 1900	Draft No: 2	
Items Action	° Type	<sup>®</sup> Matter	" Handler " Outlay	* Description	* Outstanding	BillNov
🖹 Bill in Full	F	FLY001/0002	CN	Demand & Draft Proceedings	125.00	125
🖹 Bill in Full	F	FLY001/0002	CN	Demand & Draft Proceedings	452.50	452
🗎 Bill in Full	F	FLY001/0002	CN	Court Attendance	300.00	300
🛅 Bill in Full	F	FLY001/0002	CN	Attendance	75.00	75
Don't Bill	F	FLY001/0002	CN	Court Attendance	150.00	0
					Total Fees: Total Outlay:	9
					Grand Total:	9
				Refe	resh Ok	Add to In
				10.11		
ard						-

Description

Attendance on client



Outstanding

600

300.0

#### 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.

Ite	ems							
\$		tion	* Туре	<sup>‡</sup> Matter	<sup>‡</sup> Handler <sup>‡</sup> Outla	y <sup>¢</sup> Description	Outstanding	* BillNow
	) Bill I	Bill in Full	-	^LE001/0001	BS	Total Fees	925.00	625.00
	Bill	Don't Bill		LE001/0001	JP	Pd Registered Post - letter to Land	llord 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 S	South West Geor	ges Street
			n <mark>g Group:</mark> Tota	l Fees			
Items							
<sup>‡</sup> Action	* Туре	* Matter	<sup>‡</sup> Handler <sup>‡</sup>	Outlay	* Description	Outstanding	* BillNow
Bill in Full	F	GLE001/0001	BS		File Review re counsels fees and our fees	42.50	42.50
Bill in Full	F	GLE001/0001	BS		Letter to client re instructions and section	95.00	95.00
Bill in Full	F	GLE001/0001	BS		Letter to Noel Common SC	187.50	187.50
Bill Partially	F	GLE001/0001	BS		Attendance on client	600.00	300.00

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

## OR

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

Auding a Line	to the bill manually						
	Draft Invoice						
ok Ok	Message:						
Cancel	Request Type:   Invoice  Open Invoice	Bill Sent	Invoi	ce / Bill No: (not invoiced)			
	┌─ Matter Details ─────						
	Matter: FLY001/0001	Jack Flynn		Bills: 0.00			
	Fee Earner: Carol Nolan	e Earner: Carol Nolan					
	Description: Sale of House at:			Client: 0.00			
	4 The Mews						
Choose report	Rathfarnham Dublin 6			Time (HH:MM): 1:53			
Bill Layout		03 Jul 2015 🛛 🖓 🗌 Transfer To Pay					
Print Copy	Bill To: Jack Flynn	Jack Flynn					
	4 The Mews Rathfarnham						
	Client Dublin 6a						
	Our Ref: CN Your Ref:			]			
	Write down Time to: 03 Jul 2015						
Release	Invoice Details Fee Earner Breakdown						
Notify Release Inv	Type Narrative	Net	VAT Value Fee Ea	arner			
Create FNL	F Document Drafting	150.00	34.50 Carol	Nolan ^			
	F Phone Call	27.50	6.33 Carol				
	F Advice on Contract	400.00	92.00 Carol	Nolan			

b. Adding a Line to the bill manually

i) Right-click in the Invoice Details screen to see the pop-up menu.

#### ii) Select Add a Bill Detail Line.

iii) On the *Add or edit Bill Detail Line* screen, input a narrative and amount and change the default information as necessary.

٢		Add or edit Bill Detail Line
Jack Flynn		
Sale of Hous	e at: 4 The Mews, Rathfarnham, Dublin 6	
Fees	Outlays OMiscellaneous Outlays	
Fee Earner:	Carol Nolan	×
Nominal:	Fees Issued - Carol Nolan	V
Narrative:		🗵 🕂 Add narrative
Net:	0.00 VAT Code: U	VAT Value: 0.00 Override VAT
		Ok Cancel
Line No: (ne	w)	

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

VAT

- c. How to amend the Fee Earner Breakdown
  - i) Click the Fee Earner Breakdown Tab.

Percentage

Invoice Details Fee Earner Breakdown

Fee Earner

	🕂 Add a Bill Detail Line
VAT Amount	🔀 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.

Value

Revert to original

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 Values           Fee Earner         Percentage         Value           Carol Nolan         65.36797         867.76           Brian Sweeney         34.63203         459.74	Edit Fee Earner Break	down	×
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 Cancel	Brian Sweeney	34.63203	459.74
	(Ok) Canc	el	

- 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.

		•		÷	Add Fee Earner
				4	Distribute Evenly
15 Nov 2014	14.02	CNL	Draft Bill Draft Bill No: 268	4	Renormalise percentages
15 Nov 2014	14:03	CIN	Drait Bill Drait Bill NO; 208	×	Cut Fee Earner allocation for: "Anne Mellon"

- 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

۲	-		Keyhouse Case Management (CN - Carol Nolan - 09.58 / 00.00)	1		Quick Search (Ctrl +	0) - <b>-</b> ×
Home Case Reports	Phone Log Maintain Setup Help						
🛨 / 🗙 📦							
Add Edit Delete A/c Ledger Bill Requisitions	r						
Search/Open	Carol Nolan						
All Matters	Search						Draft Invoices 📰
📜 My Matters	Matter Code	Bill Date	Addressee	Address	Type	Total	Draft No.
🐌 Recent Matters	FLV001/0001	03 Jul 2015	Jack Flynn	4 The Mews Rathfarnham Dublin 6a		710.3	3 280 ^
Contacts							
👗 Associates							
Advanced Search							
the My Invoices	~~~~~		and the second second second	and the second have been and the second s		m	m. m. mar

## **Create a Billing Guide Report**

- 1. **Open** a case in the Case Diary.
- 2. Click on Time Ledger on the Case Diary Navigation panel.
- 3. Select **Billing Guide** on the Home tab to bring up a screen asking for parameters for the Billing Guide report.
  - a. Specify the date down to which the report is to be prepared
  - b. Enter the matter code. The current case will be shown by default

	Billing Guide Report
	Enter Parameters
Matter code	FLY001/0001
To Date	10 Aug 2015 15
	L,
	Run

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

DOC	PDF	XLS
-----	-----	-----

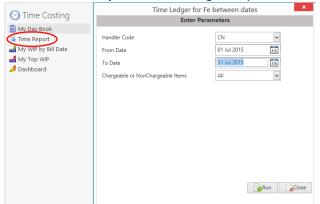
FLY001/0001 Jack Flynn Sale of House at: 4 The Mews, Rathfarnham, Dublin 6										
Date	FE	Comment		Task	Time Hrs:Min	Accum. Hrs:Min	Rate	Charge	Accum Charge	OS Charge
03/07/2015	CN	Phone Call		PHO	0 : 11	0 : 11	150.00	27.50	27.50	27.50
03/07/2015	CN	Document Drafting		DRA	1:00	1:11	150.00	150.00	177.50	150.00
03/07/2015	CN	Phone Call		PHO	0 : 10	1:21	150.00	25.00	202.50	25.00
03/07/2015	CN	Draft Bill No274		DRA	0:30	1 : 51	150.00	75.00	277.50	75.00
03/07/2015	CN	Attendance		ATT	0 : 02	1 : 53	150.00	5.00	282.50	5.00
	<u></u>	mmary WIP Fe	C Larner							
		arner		Tim (Hrs:r	-		Charge			
	Fee E			(Hrs:r	-		Charge 282.50			
	Fee E	arner		(Hrs:r	53					
	Fee E Carol WIP 1	arner Nolan		(Hrs:r 1 :	53		282.50	UnBilled		mulative

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

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

#### **The Time Report**

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



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

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

Admin T AlGO10 BLA001 BL0001	002 Allied Investment Group	Time Entry For FE CN : Matter Description	Soo Grabb Between Carol Nolan Hrs:min 0:10 3:00	Rate	Charge Task	Data Dute: 1980/2015 5/0 Frem: Date: 2107/2015 To Date: 2107/2015 Comment
Time En Admin T Algorit BLA001 BLA001	try Date : 03/07/2015 me 002 Allied Investment Group	CN : Matter Description	Carol Nolan Hrs:min 0:10	Rate		From Date: 01/07/2015 To Date: 01/07/2015
Time En Admin T Algorit BLADDI BLADDI	try Date : 03/07/2015 me 002 Allied Investment Group	Garry Barlow -v- Hired Talent	0:10	10000	Charge Task	Comment
Admin T AlG0010 BLA001 BL0010	me 002 Allied Investment Group	Garry Barlow -4- Hired Talent		22/6		
AIG0010 BLA001 BL0001	002 Allied Investment Group	Garry Barlow -v- Hired Talent				
BLA001/ BL0001/	Group	Garry Barlow -v- Hired Talent		€0.00 €0.00	€0.00 40.00	Golf Tournament
BLA001/ BL0001/	Group	Garry Barlow -v- Hired Talent	30:01	€0.00	€0.00	
BL0001/	001 Gordon T. Black	Services	2:00	€150.00	€300.00 DIC : Dictation	Dictation
		RTA Walkinstown Crossroads, G.	0:30	€150.00	€75.00 ATT : Attendance	Attendance
	Joe Bloggs	Black Advice File	0:00	€0.00	€570.00	ob9bvbv.y
	0001 Mike Breeze	Broken left leg.	1:00	€150.00	€150.00 ADV : Advice	Talked with Mike re options for
			1:00	€150.00	€150.00 DIC : Dictation	settlement Dictation to Doctor and Opposing Council
			0:30	€150.00	€75.00 REV: File Review €150.00 INS: Instructions	Review Medical Report Instructions received - Meeting
			1:00	€150.00	received	with Client
	103 000000	Sale of House at 4 The Mews	1:00	€150.00	€150.00 COU : Court Attendance €27.50 PHO : Phone Call	Court Attendance Phone Call
FLYOUR	001 Jack Flynn	Rathfamham, Dublin 6	1:00	€150.00 €150.00	€27.50 PHO: Phone Call €150.00 DRA: Document Drafting	
			0:10	€150.00	€25.00 PHO : Phone Call	Phone Call
			0:30	€150.00 €150.00	€75.00 DRA: Document Drafting €5.00 ATT: Attendance	Draft Bill No274 Attendance
FLY001/C	002 Jack Flynn	Purchase of 16 The Haywain,	0:50	€150.00	€125.00 DEM : Demand & Draft	Demand & Draft Proceedings
		Terenure, Dublin 6	1:00	€150.00	Proceedings €150.00 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 Recorded Mins	Daily Time Daily Val 49 : 25	ue	dmin (Hrs):	33 : 11	
	Chargeable (Hrs):	16:14 €3,005.00	1	Inassigned (H	rs): 0 : 00	
	Non-Chargable (Hrs)	: 0:00 €0.00	1	Write Offs (Hrs	c 0:00	C
		€3,005.00				
			Specialists www.ke			Page 1 of 2

### My WIP by Bill Date

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

WIP is Work in Progress i.e. unbilled time

				Data Dat	e : 10/08/2015: 9:08		
	Started	Last Bill Date	Matter	Client Name	Description	Client A/C	WIP
N		Carol N	olan				
	31/01/2012		ABB002/0002	Abbie Lunch	Share Holding Agreement	0.00	300.00
	29/05/2012		AIG001/0002	Allied Investment Group	Garry Barlow -v- Hired Talent Services	0.00	300.00
	02/12/2005		BE\$001/0001	Business Time Limited	Lease of Unit 33, Eastgate Avenue, Dublin 12.	0.00	301.20
	03/07/2015		BRE001/0001		Broken left leg.	0.00	675.00
	29/09/2011			Thomas Brolin		(200.00)	110.00
	29/09/2011			Finance Department	Legal Advice re Repatriation Damages - 21 Main Street	(200.00)	6.00
			FIN001/0002				
	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			Margaret Lawlor	Debt collection against husband	0.00	10.00
	02/05/2012			Lowery Developments	Receivership - Nama Properties 1 Sandyford Estate	(2,100.00)	2,105.00
	02/05/2012		LOW001/0003	Lowery Developments	Receivership - Nama Properties - No 3 Sandyford Estate	(925.00)	625.00
	01/01/2010		QUI002/0001	Niall Quinn	Accident at work	(2,000.00)	363.00
	23/09/2010		SHA001/0003	John Shaw	Jones Trust	0.00	49.50
	06/07/2015		TJF001/0001	TJ Fox	Outstanding debt to PTSB Bank.	0.00	312.50
2011					-		
May							
may	08/05/2010	12/05/2011	BLA001/0001	Gordon T. Black	RTA Walkinstown Crossroads, G. Black	0.02	1.075.00
Decem		12/03/2011	DEROOTIOOOT	Cordon I. Black	Reference of the second se	0.02	1,015.00
Decen		24/42/2044	1.014/004/0004	Laura Davida anta	Presiventia News Presedies No.04 Orest feet	(005.00)	402.00
				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	r <b>v</b>						
	02/05/2012	31/01/2012	LOW001/0002	Lowery Developments	Receivership - Nama Properties No 2 Sandyford Estate	(925.00)	225.00
March					. , , , , , , , , , , , , , , , , , , ,	(,	
march	10/11/2011	06/03/2012	LAW001/0001	Liz Lawlor	Advice re Inheritance tax	(5,000.00)	147 00
204 1	10/11/2011	00/03/2012	LANOUTOUT	LIZ LOWIOI		(3,000.00)	147.00
2014							
June							
	20/05/2011	19/06/201	4 ABA001/0001	David Abrahams	Family Law	(7,737.17)	4.00
						Chargeable WIP	9,961.70
						Non-Chargeable WIP	
						Report WIP Totals :	0.064.70
						Report WIP Totals :	9,961.70

Soo Grabbit & Runne

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

oc		XLS					
	Type the text	to find 🔹		÷			
					Soo Grabbit & Runne		
				WIP for Fee E	arner by Last Bill Date	Data Date :	12/11/2014:21:14
	Started	Last Bill Date Mat	tter	Client Name	Description	Client A/C	WIF
CN		Carol Nola	n				
	08/05/2004	ΔB	B001/0001	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	FIN	001/0002	Finance Department	Damages - 21 Main Street	0.00	3.00
	11/12/2013	KE	L002/0001	Sarah Kelly	Purchase of Property	0.00	4.50
	02/05/2012			Lowery Developments	Receivership - Nama Properties - No 3 Sandyford Estate	(925.00)	500.00
	01/01/2010	QU	1002/0001	Niall Quinn	Accident at work	(2,000.00)	300.00
	23/09/2010	SH.	A001/0003	John Shaw	Jones Trust	0.00	49.50
2009							
April							
	03/06/2010	20/04/2009 QU	1001/0005	Alan Quinn	Sale of 12 Main Street, Bray, Co. Wicklow	0.00	600.00
May							
	14/01/2011	30/05/2009 FIT	001/0001	Scott Fitzpatrick	Estate of Joan Fitzpatrick	(480.75)	3.00
						Chargeable WIP Non-Chargeable WIP	2,358.7
						Report WIP Totals :	2,358.70
						*۸	lon-Chargeable Tim

# My Top WIP

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

		Soo (	Grabbit & Runne						
	To	op Work In Progre	<u>ess By Fee Earner</u>	Data Date : 10/0	8/2015: 9:42 See Earner : Cl				
	Including chargeable and nonchargeab								
Matter	Last Bill Date	Client Name	Matter Description	Client A/c	WIF				
CN	Carol Nolan								
LOW001/000	1	Lowery Developments	Receivership - Nama Properties 1 Sandvford Estate	(2,100.00)	2,105.00				
FLY001/0002		Jack Flynn	Purchase of 16 The Haywain, Terenure, Dublin 6	0.00	1,102.50				
BLA001/0001	12/05/2011	Gordon T. Black	RTA Walkinstown Crossroads, G. Black	0.02	1,075.00				
BRE001/0001		Mike Breeze	Broken left leg.	0.00	675.00				
LOW001/000	531/12/2011	Lowery Developments	Receivership - Nama Properties - South County Dublin - Disputed	(1,000.00)	667.50				
QUI001/0005	05/06/2010	Alan Quinn	Sale of 12 Main Street, Bray, Co. Wicklow	0.00	663.00				
LOW001/0003	3	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	2	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	2 31/01/2012	Lowery Developments	Receivership - Nama Properties No 2 Sandyford Estate	(925.00)	225.00				
LOW001/0004	4 31/12/2011	Lowery Developments	Receivership - Nama Properties - No 81 Sandyford Business Park	(925.00)	192.00				
LAW001/0001	1 06/03/2012	Liz Lawlor	Advice re Inheritance tax	(5,000.00)	147.00				
BRO002/0001		Thomas Brolin	Legal Advice re Repatriation	(200.00)	110.00				
SHA001/0003		John Shaw	Jones Trust	0.00	49.50				
TAL001/0001		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	1	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				

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

#### **KPI Reports**

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



<b><i>REYHOUSE</i></b>	Key Performance Indica By Fee Earner Financial Period : Apr	KPI Parametera								
For Fee Earner : Justin Phelan (JP) 800 Grabbit & Runne										
Time Recording (Hours)	Fees issued by Mor	nth Fees Year To Date								
Northy The Respond Avera		Atlant								
Fees Issued Apr	20.605 Fees iss	ued YTD (Jan 2009) 53.857								
Fees Issued Mar		ued Last Year To Date 0								
Outstanding Fees	10,766 Outstand	ling Fees Over 60 Days 10,766								
Outstanding involces	13,495 Outstand	ling involces Over 60 Days 13,495								
No. of Draft Involces	0 Value of	Draft Involces 0								
Recorded Hours (01010008-31400009.) No. of Unposted Time Entries	131His 36mins WIP/Unb 0 WIPByV	oliled Time 31,453 alue WIPByDate WIPByOlient								
No. Open Active Matters/Cases		re Matters/Cases Opened 14								
No. Matters Opened YTD (Jan 20)										
No. Cases With Statute	4 No. Case (Up Tablet)	es With Statute 3 10010)								
No. Undertakings Not Discharged	1 No. Unde (Up Te Car	ertakings Not Discharged 1 10010)								
No. Overdue Actions No. High Priority OS Actions	8 No.Totel 0 (As of: Dom)									
	o. Cases/Matters By Depa	rtment								

# **Chapter 12: 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.

Hor	ne Case Reports	Phone Log Maintain Setup	Help			<u> </u>					
	📄 Draft Invoice 📼 Request Cheque	<b>_ 1</b>									
Print	Accounts	Comment Set Client Reserve Client Balances Debtors Ledger A/c Ledger									
🙏 Clier	nt/Case	Case: IBS001/0019	International Busin -v- Fitzsimmons Pr	ess Services Ltd operty Management plc							
Case D	iary										
🚺 Docum	ient Manager										
	t Client Details	Search									
	t Case Details	Date 9	Ref	Narrative	Billing A/c	Outlay A/c					
	case Details	> 30 Jun 2011	pc	Pd Registered Post		5.50					
Associa	ates Information	03 Jul 2011	5012368	Pd Brady & Co Search Fees		57.50					
U Critical	information	12 Jul 2011	pc	Pd Commissioner for Oaths swearing affidavit of debt		40.00					
📓 A/c Leo	laer										
📓 Time L											
📓 Debt L	edger										
📓 Reserv	e Ledger										
🕛 Undert	akings										
Strong	Really					~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~					

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

## Run a Report on client balances

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

	Client Balar	nces	×
	Enter Param	eters	
Client	IBS001	~	
		Run	Close

Type the text to find	5					
(Last Posting: 06/09/2012 )		tte	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	MV	1,968.42	0.00	0.00	0.00
0002 Debt Recovery - Mary Ascond	DEB	MV	4,650.96	0.00	0.00	0.00
Total Matters: 3 * = Billed	Total Balan	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.

	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.

Date	15 Nov 2014	~	
Paying in Pa	irt Payments		
		Ok	Cancel

## How to Create a Cheque Request

- 1. **Open** a case in the Case Diary.
- 2. Click on A/C Ledger on the Case Diary Navigation panel.
- 3. Click on **Request Cheque** on the Home tab.
- 4. Input the following information:
  - Bank Select the required bank account from the drop-down list.
  - Date Today's date will be shown by default. Change as necessary.
  - Payee Input the Payee's name or select from the supplier dropdown list.

		Cheque Request				×
Bank:	Client Current Bank	A/c	~	Date:	15 Nov 2014	~
Payee:	Brady & Co		~	Value:		100.00
Fee Earner:	Carol Nolan		~		Third Party	
Narrative:	Pd Brady & Co					~
Notes:	Searches					
– Matter Details –						
Matter:	IBS001/0019	▲ ► International Busines	ss Servio	es Ltd		
		-v- Fitzsimmons Pro	perty M	anageme	nt plc	
	(Client A/c)	Outlay Code:	Search	Fees		~
		Outlay A/c:				103.00
		Client Current A/c:				0.00
Ledger Narrative:	Pd Brady & Co					K
		Ok Cancel		i 🗐	Notify Release	Release
Requested By: Carol N	Nolan Req. No: (new)					

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

# How to Create a Draft Invoice

- 10. **Open** a case in the Case Diary.
- 11. Click on A/c Ledger on the Case Diary Navigation panel.
- 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	<b>Input</b> a message for the Accounts Department (optional)
Туре	<b>Invoice</b> will be checked by default; select

		Draft I				
V Ok	Message:					
Cancel	Request Type: O Cri	edit Note 💿 Invoice	Open Invoice	Bill Sent	Invoice / Bill No: (not i	nvoiced)
	Matter Details				Bills:	0.00
	↓ Matter:				Outlay:	5.60
	Description:					-45.00
	Date:		🖌 🔲 Transfer To Pay		Charges:	
Print Copy	Bill To: Client	Charlie Gleeson South West Georges Stree Dublin 2	t		Time (HH:MM):	3:42
	Our Ref:	JP	Your Ref:			
	Write down Time to:	15 Nov 2014	~			
	Invoice Details Fee	Earner Breakdown				
	Type Narrative		Net	VAT Value	Fee Earner	
			IVEL	VAT Value	ree camer	
Release Notify Release Inv		Righ	t-Click for Op		ree canner	,

Open Invoice Check the box to create an open invoice.

Credit Note if required.

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

- MatterThis 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.

Client

- Our Ref This will default to the Fee Earner's initials, but may be amended if required.
- Your Ref Input a reference if applicable.
- Write down time to Today's date will be shown by default. You may choose a different date for the time to be written down to.
- 13. Insert the Bill Details: this can be done by importing time and outlays using the **Billing Guide Wizard** or by manually inputting fees and outlays.

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

# **My Draft Invoices**

#### How to View My Invoices

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

🕂 🖊 📜							
Add Edit Delete A/c Le 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

## How to Add a Draft Invoice

- 1. Click Add on the Home tab while viewing My Invoices as described above.
- 2. A draft Invoice will appear.
- 3. Complete as previously described in How to Create a Draft Invoice, p. 124 above.

#### How to Edit a Draft Invoice

- 1. Go to **My Invoices** as described above.
- 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.
- Click OK to save the changes or click Release to save the change and send to Accounts for approval.

							Draft	Invoice						
$\checkmark$	Ok	M	essage:											
	Cancel	Re	equest Typ	e:	Invo	oice	🔲 Open Invoi	ce 🔳	Bill Ser	it	I	Invoid	e / Bill No: (not i	nvoice
	Cancel		Matter Def	tails —										
				Matt	er: GL	.E001/	0001	C	harlie Gl	eeson			Bills:	0.0
			D	escriptio	on: Le	ase of	South West Geo	rges Stre	et				Outlay:	5.6
				Da	te: 15	Nov	2014	-	Transfe	r To Pay			Client:	-45.0
				Bill 1	To: Ch	orlia (	Sleeson						Charges:	925.0
			ſ	Client			lest Georges Stre	et Dublin	2				Time (HH:MM):	3:4
-	Print Copy			Our R	ef: JP			Yo	ur Ref:					
		v	Write dow	n Time 1	to: 15	Nov	2014	V						
		I	nvoice De	tails F	Fee Earr	ner Bri	eakdown							
		1	Туре	Narrati	ive				Net		VAT Value	Fee	Earner	
		Þ		Attend	lance or	n clien	t			600.00	138.00	Bria	n Sweeney	
J	Release		F	Letter	to clien	t re in	structions and se	ction 6		95.00	21.85	Bria	n Sweeney	
			F	File Re	view re	couns	sels fees and our	fees		42.50	9.78	Bria	n Sweeney	
Notif	fy Release Inv		F		to Noel					187.50			n Sweeney in Phelan	
			0	Dd Rec	nistered	Port.	<ul> <li>letter to Landlor</li> </ul>			5.60				

#### How to Delete a Draft Bill

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

#### How to Release a Draft Bill to Accounts

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

#### How to Print a Draft Bill

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

Chapter 12 Not counter dates	Company Road	Manual Red	
INVOICE			^
DRAFT			
		15 Nov 2014	
2			
	Our Ref:	ЛР	
0	Your Ref:		
	Not Liable to VAT €	Liable to VAT €	
		600.00	
8 letter		95.00	
		42.50	
		187.50	
	5.60		
			ß
SUBTOTALS	5.60	925.00	
925.00 @ 23.00 % VAT		212.76	
Add total not subject to VAT		5.60	
INVOICE TOTAL:		1,143.36	
	DRAFT 0 0 SUBTOTALS 925.00 @ 23.00 % VAT Add total not subject to VAT	DRAFT 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	DRAFT



# **My Cheques**

#### How to Create a Cheque Request

- 1. View My Cheques as described above.
- 2. Click Add on the Home tab.
- 3. Input the following information:
  - Bank Select from the drop-down list.
  - Date Today's date will be shown by default; change as required.
  - Payee Input the Payee's name or select a supplier from the drop-down list.
  - Value Input the amount of the cheque.

		Cheque Request			×
Bank:	Client Current Bank	A/c	~	Date: 15 Nov 2014	~
Payee:	Brady & Co		~	Value:	100.00
Fee Earner:	Carol Nolan		~	Third Party	
Narrative:	Pd Brady & Co				~
Notes:	Searches				
– Matter Details –					
Matter:	IBS001/0019	• International Busines			
	(Client A/c)	Outlay Code:		2	~
		Outlay A/c:			103.00
		Client Current A/c:			0.00
Ledger Narrative:	Pd Brady & Co				K
		Ok Cancel		🔲 Notify Release 🗌	Release
Requested By: Carol N	Nolan Req. No: (new)				

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

Ledger By default to the cheque narrative will be shown but it can be amended either Narrative 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	rts Phone Log Maintair	Setup Help				<u></u>	
Add Edit Delete A/c Led Cheque Requisitons							
Search/Open	Carol Nolan	~					
All Matters	Search						Standard Vie
le Recent Matters	Requested On	Requested By	Bank	Narrative	Value	Payee	Fee Earner
My Contacts	15 Nov 2014	Carol Nolan	PCASH	Pd O2 Communionations	50.00	O2 Communionations	Carol Nolan
🂐 Advanced Search	29 Oct 2014	Carol Nolan	CLIENT	Pd Brady & Co	1,000.00	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 dialogue box.

# How to view the A/C Ledger

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



ISE: BLA001/0001	Gordon T. Black RTA Walkinstown Crossroads, G. Black					Tel: 01 4766 F/e: BS
Search						
Date	Ref	Varrative	Billing A/c	Outlay A/c	Client	Deposit A/
12 May 2011	pc	Stephen Keogh Senior Counsel Fees		3,230.00		
30 Apr 2010	pc	Pd Commissioner for Oaths		55.00		
30 Mar 2010	pc	Pd Swearing fees		24.00		
02 May 2012	Ld	Lodged fees	(73,800.00)			
18 Apr 2012	Inv 321	Invoice: Fees:60000 Outlay:0 VAT:13800	73,800.00			
19 Jun 2010	5887	Pd Mr Gordon T Black settlement less fees as agreed			12,548.00	(
20 Oct 2011	509818	Pd cLIENT			2,036.72	
30 Jul 2010	500178	Pd Gordon T Black balance due to client			375.30	(
24 Apr 2010	2390	Pd Dr Simon Young Medical Report		250.00		
15 Mar 2010	2266	Pd PIAB		50.00		
12 May 2011	218	Invoice: Fees:635 Outlay:379 VAT:133.35	1,147.35			
12 May 2011	218	To Invoice 218		(55.00)		
12 May 2011	218	To Invoice 218		(250.00)		
12 May 2011	218	To Invoice 218		(24.00)		
12 May 2011	218	To Invoice 218		(50.00)		
30 May 2010	1739	Lodged settlement agreed			(13,750.00)	i
10 Jun 2010	1654	Lodged on a/c fees & vat			(1,210.00)	e
20 Oct 2011	123456	Lodged part payment on a/c	(1,000.00)			
26 Oct 2011	1234545	Bill from Airtricity		106.61		
07 Aug 2015		FNL: 500.00 Gordon T. Bl Fees: 500.00 Outlay: 0.00 Vat: 0.00				
lient A/c Reserve	0.00		147.35	3,336.6	1 0.0	12 0

# **Chapter 13: 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.

		International Business Servic	es Ltd -v- Stephe	n Keogh										F/e:	BS
Priginal Debt Amount	50,000.00											Total Collecte	d To-date	5,600.00 Po:	st Paymen
terest To-date	2,652.05 P	ost Interest													
ecoverable Cost To-da	ate 60.00	Post Costs										Outstandin	g 4	7,112.05	
Matter Code	Date	Description	Method	Туре	Payment	Principal Paid	Interest Paid	Cost Paid	Interest Due	Cost Due	Remitted	Held Date	Posting Ref	Reference	
IBS001/0008	26 Aug 2008	Court Fees		Costs	0.00	0.00			l	60.00			14		
IBS001/0008	26 Aug 2008	Interest on 50,000.00 at 2		Interest	0.00	0.00			2,652.05	0.00			15		
IBS001/0008	26 Aug 2008		Cheque	Receipt	5,000.00	5,000.00			0.00	0.00		09 Sep 2008	16		
IBS001/0008	26 Aug 2008		Cheque	Receipt	600.00	600.00			0.00	0.00		09 Sep 2008	19		

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

confirm.

 $\checkmark$ 

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

## How to Post a Payment

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

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

Input the following information on the Post Payment dialogue box:

	Post p	ayment		x
Payment Proper	ties			
Matter Code	IBS001/0001			
Date	15 Nov 2014			
Reference	1425	]		
Туре	Direct Payment			
Payment Method	Cheque 👻			
Value	305.00	]		
Principal Paid	250.00	Principal Status	Part Payment	~
Costs Paid	50.00	Costs Status	Part Payment	~
Interest Paid	5.00	Interest Status	Part Payment	~
Description Paid	3 of 5 payments			
			(	Save Cancel

Date	The date will default to today's date; amend if required.
Reference	Input a reference.
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	Input 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.
Description	Input a description for this payment.

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

## How to Post Costs

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

		Post Costs	<
Matter Code	IBS001/0001		
Date	15 Nov 2014	Charge cost to Client	
Costs	100.00	Client Charge 50.00	
Description	fees		
		Save Cancel	]

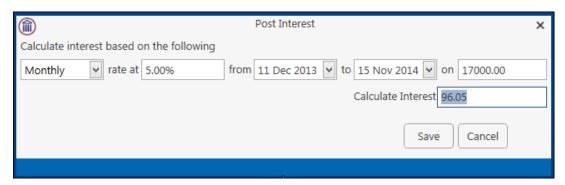
3. Input the following information on the Post Costs dialogue box

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

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

## How to Post Interest

1. Click on **Post Interest**.



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

Term Select Monthly, Yearly etc. from the drop-down list.

- Rate at Input the rate of interest
- From **Input** the start date or click the down arrow to select from the calendar.

- To **Input** the end date or click the down arrow to select from the calendar.
- On **Input** the amount on which the interest is to be calculated.
- Note: Once the information is provided the interest will calculate automatically and will then be displayed in the Calculated Interest box.
- 3. Click **Save** to post the interest and the balance will automatically update.

# How to 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 dialogue box will appear.

	Debt Costing Ledger Enter Parameters	×
Matter	IBS001/0001	
		Run

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

Þ					View Report				
BOOC PDF SXLS 🕷 🗭									
🗃 🥹 🖳   Type the test to find 🔹 🔸 🕞 🦃									
3 ℃ Lal.   Type the text to find									
						_			
				Debt	Costing Le	anner			
					-	-			
	Matter			IB \$001/00			ness Service	es Ltr	
	Original Del			50,000					2,652.05
	Recoverable	e Costs		60	0.00 Collected				5,600.00
					Outstand	ing			47,112.05
	Date	Method	Туре	Value	Premium Paid	Costs	Costs Paid	Interest	Interest Paid
	26/08/2008		Costs	0.00	0.00	60.00	0.00	0.00	0.00
	26/08/2008		Interest	0.00	0.00	0.00	0.00	2,652.05	0.00
	 26/08/2008		Receipt	5,000.00	5,000.00	0.00	0.00	0.00	0.00
	 26/08/2008	Cheque	Receipt	600.00	600.00	0.00	0.00	0.00	0.00

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

# **Chapter 14: The Reserve Ledger**

The reserve ledger is used in litigation and medical negligence cases to make provision for awards of damages.

# How to View the Reserve Ledger

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

Client/Case	Case: IBS001/0020		< ▶ Ir	terim Busine	s Services Ltr	ł											Tel: 0	01-66770
Case Diary			G	ary Neville -	Short term lo	an											F/e: B	s
Document Manager																Add	Edit	Delet
Current Client Details Current Case Details Other 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 Com	iment
Associates	08 Aug 2013	40,000.00	30,000.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000	test								
Critical Information	08 Aug 2013	50,000.00	30,000.00	0.00	20,000.00				10,000									
	08 Aug 2013	50,000.00	0.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000									
A/c Ledger Time Ledger Debt Ledger Reserve Ledger Undertakings																		

# How to Add an Entry

- 1. Click on Reserve Ledger on the Case diary Navigation panel.
- 2. Click Add on the Home tab. The Reserve Ledger Insert dialogue box will appear.

	Reserve Le	dger – Insert 🛛 🗙
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	
		QK Cancel

Input an estimated amount and description for each of the following that applies:

General Damages Special Damages Future Specials Property Damage Other Damage

Next, estimate, and input a description for, the following, which are expected to reduce the client's liability.

Contributory Negligence Co Defendant Liability

Finally, input an estimate of the Costs.

The **Damages Total**, **Reserve Total** (Damages Total less Contributory Negligence and Co-Defendant Liability) and **Estimate Total** (Reserve Total plus Costs) will be calculated automatically.

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

## How to Edit an Entry

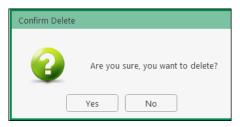
- 1. Click Reserve Ledger on the Case diary Navigation panel.
- 2. Select the **entry** you want to edit, then click **Edit** on the Home tab. The **Reserve Ledger Insert** dialogue box (see above) will appear.
- 3. Make the required changes.
- 4. Click **OK** to save the changes.

## How to Delete an Entry

- 1. Click Reserve Ledger on the Case diary Navigation panel.
- 2. Select the **entry** you want to delete, then click **Delete** on the Home tab.
- 3. You will be asked to confirm the deletion.
- 4. Click **Yes** to confirm.

## How to Print the Reserve Ledger

- 1. Click **Reserve Ledger** on the **Case diary** Navigation panel.
- 2. Click **Print** on the Home tab.
- 3. A report will run; to print the report, click the Print icon on the report toolbar.



# **Chapter 15: 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.

D					Keyhouse C	ase Management (CN - Carol Nolen - 0806 / 0000)	Quick Search (Ctrl + Q)
Home Case Reports	Phone	.og Maintain Set	up Help				
hone Log Add Add to C	ase Edi	Delete					
Phone Log	Search						Standard View
		Case Code	Date	Name	Who	Message	Description
All Matters	14	TJF001/0001	06 Jul 2015	TJ Fox	AM	Caller: PTS8 - Branch Manager Branch Manager called to say a payment was receiu.	Outstanding debt to PTS8 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	
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, Rathfamham, 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		BE5001/0002	03 Feb 2015	Business Time Limited	BS	Phone Call	Shareholding Agreement
My Cheques	1	BES001/0001	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	AlG001/0004	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
🗟 Document Search	1	AlG001/0003	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	AlG001/0001	29 Apr 2014	Allied Investment Group	BS	Phone Call to discuss potential damages and costs.	Noel Brown -v- Jones Services Ltd
				Abbie Lynch	85	Type in here any conversation details Call from: Abbie Lynch Phone No: +353-87-8	

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

 $^{\swarrow}$  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.

₩Z↓	Sort Ascending				
Z↓	Sort Descending				
<b>2</b> ¥	Clear Sorting				
8	Group By This Column				
	Show Group Panel				
	Show Column Chooser				
₽	Best Fit				
	Best Fit (all columns)				
٢	Filter Editor				

## How to Filter the Phone Log

- 1. Open the Phone Log
- 2. To filter move your mouse over the column heading until a pin appears.

Search								
	Case Code	Date	Name	Who	Message			
$\checkmark$	TJF001/0001	06 Jul 2015	TLEOX (Blanks)	<b>^</b>	Caller: PTSB - Branch Manager Branch Manager calle			
$\checkmark$	TJF001/0001	06 Jul 2015	TJ Fox (Non blan		Spoke with solicitors for the Building Society to try and			
$\checkmark$	BRE001/0001	03 Jul 2015	Mike I		Caller: Mike Breeze Wants to discuss settlement option			
$\checkmark$	FLY001/0002	03 Jul 2015	Jack F Abbie Lyn	cn usic World Ltd	Caller: James Bay Draft Contracts are ready for review.			
$\checkmark$	FLY001/0001	02 Jul 2015	Jack F	stment Group	Called client to remind him to send back the papers			
	SIM001/0001	02 Jul 2015	Bart S Angela Be		Called client to remind him to send back the papers			
	BES001/0002	03 Feb 2015	Busine Bart Simp		Phone Call			
$\checkmark$	BES001/0001	03 Dec 2014	Busine Bill Clintor		Phone Call to Harold Worth			
$\checkmark$	NOL001/0001	04 Sep 2014	Paula Bob Murp		test test			
$\checkmark$	ABB001/0001	08 Aug 2014	Georg Business T		Telcon with etc etc			
$\checkmark$	AIG001/0004	29 May 2014	Allied Charlie Gl		Sean enquired about third party cover. I informed him			
$\checkmark$	AIG001/0003	29 May 2014	Allied Chow Min	g Zhang	Frank phoned Claims team to follow up on file details			
$\checkmark$	AIG001/0002	27 May 2014	Allied Claire Bou	irke	Alan phoned regarding uncompleted claims form			
$\checkmark$	BEC001/0006	20 May 2014	Angel: David Abr	ahams	Phone lender for redemption statement - Any note			
$\checkmark$	DUG001/0001	19 May 2014	Paul D David Blog	ggs	Phone buyers' solicitors, check buyers' full names			
$\checkmark$	BLO002/0001	19 May 2014	David		Phone lender for redemption statement			
1	DUG001/0001	09 May 2014	Paul Duggan	BS	Phone buyers' solicitors, check buyers' full names			
1	DUG001/0001	07 May 2014	Paul Duggan	BS	Phone lender for redemption statement			

- 3. Click on the pin to see a list of filter options click on the required filter.
- 4. To clear the filter, select **(All)** from the filter drop-down menu (alternatively, right-click the column heading and select **Clear Filter** from the pop-up menu).

#### How to Group column headings in the Phone Log

- 1. Open the Phone Log.
- 2. Right-click on a column heading to see the pop-up menu.
- 3. Select Group By This Column from the menu. The following example shows the results.

			Case Code	Name		Date	Message			
Þ	► Who: AM									
	► Wh	▶ Who: BS								
	► Wh	▶ Who: CN								
	⊿ Wh	io: J	P							
		2	BOU001/0001	Claire Bourke		24 Oct 2010	Telephone Attendance			
			BOU001/0001	Claire Bourke		17 Jul 2010	Telephone Attendance			
T			SMI001/0001	Smith & Green		20 Jan 2011	Caller: john smith - harry rang re contracts			
	► Wh	io: I	ИК							
	► Wh	io: I	ww							
1	▶ Wh	10: 5	SK .							

4. To remove the grouping, if the Group Panel is hidden, right-click on a column heading and select **Show Group Panel** from the pop-up menu.

5. When the **Group Panel** is shown, right-click on the column name in the Group Panel.

6	Group Panel					
<u> </u>				Full Expand		
				Full Collapse		
•	•	WI	₽↓	Sort Ascending		
	►	WI	Z↓	Sort Descending		
	►	WI	A∦ Z¥	Clear Sorting		
	►	w	-24	Ungroup		
	►	w		Hide Group Panel		
	►	w		Show Column Chooser		
	►	w		Best Fit (all columns)		
				Group Summary Editor		
			Ŷ	Filter Editor		

i

6. Select **Ungroup** from the pop-up menu.

## How to add a phone message

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

	Add Phone Log – 🗙
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
Message	
	Send Email Qk Cancel

Input the following details on the Add Phone Log dialogue box:

- Case Code By default this will be ZZZZZ/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)
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: Lot - <u>Pls</u> call	
	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 16: 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.

	View	
Open Cases		
Closed Cases		
Open and Closed Cases		
Standard View		

- 4. Select the required View
  - Closed Cases to search only closed cases
  - Open Cases to search only open cases.
  - Open and Closed Cases to search both lists.
- 5. Input a search term in the search box; the search will update as you type.

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

- 1. Search for the closed case as described above.
- 2. Double click the required case to view the Case Diary.
- 3. Click on A/C Ledger on the Navigation panel to view the archived ledger.
  - Note no amendments can be made in the Case Diary unless the case is reopened.

## How to reopen a closed case

- 1. Search for the closed case as described above.
- 2. Double click to open in the case diary.
- 3. Click on **Current Case Details** on the Navigation panel, to see the Current Case Details screen.
- 4. Select the Archive Tab in Current Case Details.
- 5. Uncheck the box marked **Closed**. The case is now reopened.

## How to close a Case

Matter 0020 Matter Admin Case Associate Other Details Archive Closed Date: 16 Nov 2014 Closed

IBS001

Description

Gary Nevi

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.

Client Code

- 1. Click on **Search/Open** on the Navigation panel.
- 2. Select All Matters on the Navigation panel.
- 3. Search for the case in the normal way.
- 4. **Double click** to open in the Case Diary.
- 5. Click on **Current Case Details** on the Navigation panel, to view the Current Case Details screen.

				Current Cas	e Details			
Client Code		FLY001	Description	Purchase of 1	6 The Haywain,	Terenure, Dubl	in 6	
Matt	er	0002						
Matter	Admin	Additional Details	Case Associate	e Archive	Billing Details	Permission	Linked Cases	
Fee Ear	ner	Carol Nolan		Y File	e Ref	FLY002/001		
Secreta	ry	Anne Mellon		*		Enter		
Partner		Stephen Keogh	h 🗸			Enter		
Departr	ment	Conveyancing		•		Enter		
Work T	ype	Purchase		*		Mark as Imp	oortant	Statement
Old Ref	ference	FLY001/001		Bra	anch	Dublin Office		~
Case P	Plan & Stat	us						
Case	Plan/Type	Property Purchase	e	♥ File	e Colour	Select file cold	bur	✓ Clear
Case Status		Loan approval rec	approval received		cord No	Enter record no		
File Numb	per:362							OK Can

- 6. Select the Archive Tab. This will be greyed out if you don't have the required permissions.
- 7. Check the box marked **Closed**.

		C	urrent Cas	e Details				×
Client Code FLY0 Matter 0002		Description Pu	rchase of 1	6 The Haywain, T	erenure, Dubl	in 6		
Matter Admin Addi	tional Details	Case Associate	Archive	Billing Details	Permission	Linked Cases		
Closed Originally o	losed on							
Date File Closed								
Location			~					
Archive Location								
File Barcode No								
Box Barcode No								
Expected Destroy Date	Please selec	t date	~					
Actual Destroy Date	Please selec	t date	~					
Destroyed by	Select fee e	arner	~					
File Number:362						2	<u>o</u> k	<u>C</u> ancel

8. If the case cannot be closed because there are uncompleted tasks or there is an account balance, a warning message will be displayed, giving the reason why the case cannot be closed.



#### Or

If there is unposted time or there are charges outstanding, an alert message will be displayed. In this case, you may proceed with the closure of the case or **Cancel** it.

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 17: Using the Document Manager and Brief Wizard

## **Document Manager**

## **Getting around Document Manager**

Below is an image of the Document manager window.

		Ribbons		
Home Case Reports	Phone Log Maintain - Setup Help		Keyhouse Case Management (CN - Carol Nolan - 00.00 / 07.21)	Quick Search (Ctrl + Q)
😰 🚔 0	😵 🍥 📚	Case Box		Preview Pane
New Item  Print  Capture Actions	Generate Complete Action Start Timer Post Time Documents Accounts		Column Headings	Fleview Falle
Sclient/Case	Case: FLY001/0001	Search box	Column readings	Tel: 01-569 7412 F/e: CN
Document Manager & Current Client Details	Search		/ //	Standard View 🗾 Pre w 🔹
S Current Client Details	A. C., A., P., D., A., Date Time	Handler Synopsis	$\sim$	Action Co F
Extra Case Details	19 Feb 2016 15:41	CN Review File		G16 Preview Document
Associates	S 12 Feb 2016 16:01	CN Letter to Lending Institutio	n	G04 P FLY001/0001/CN/AM
Critical Information	12 Feb 2016 15:44	CN Letter to Client		G02 F
🗳 Know Your Client		CN Letter to Solicitor		G03 🏳
📓 A/c Ledger	Navigation panel	CN Meeting		G27 🖗 12 February 2015
📓 Time Ledger	Nuvigation punct	CN Letter to Client	De surs ent l'et	G02 P
Debt Ledger	S 01 Feb 2016 15:50	CN Letter to Client	Document List	G02 🔛 Jack Flynn
Reserve Ledger Undertakings	S an 2016 16:00	CN Court Date		G26 P 10 Rose Lawn
Undertakings	S 18 Jan 2016 16:01	CN Attendance Sheet?		G20 P Blanchardstown Dubin 17
Strong Room	S 30 Dec 2015 16:02	CN Letter to Doctor ?		GOS P Duban 1/

Window area	Description
Case Box	Input the case reference in this box or click the browse button and
	search for the required case.
Column Headings	Click the column headings to sort the list of documents by name, version,
	diary date, document date, document class, Source, From, To, Subject.
Document List	The list of documents in this case are displayed.
Preview Pane	The selected document is previewed in this window
Search box	Enter search text in this box

Home tab	Description							
Print	Print							
Properties	Show document properties							
Reclassify	Reclassify: change the document class							
Email	Click to email current document							
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</b> Maintenance window							
Use Adobe PDF Viewer	Tick to use Adobe Reader to preview document.							
	Compare two documents using Word's Document Compare feature							
MS Word	Compare two documents using WorkShare (if installed)							

#### How to search the Document Manager

- 1. **Open** a case in the case diary.
- 2. Click **Document Manager** on the Navigation panel. All the attachments in the case will be listed.

ii)	Keyhouse Case Management (CR - Cerd Noin - 0001 / 0728)	Quick Search (Ctrl + Q)	×
Home Case Reports	s PhoneLog Maintain Setup Help		
New Item - Print - Captu	re Generate Complete Action Start Time Post Time Account		
Client/Case	Case: F1Y001,0001		Tel: 01-569 741 F/e: CN
Document Manager	Search	Standard View T	
Sourcent Client Details	C. A., P., D. A., Date Time Handler Synopsis	Action Co F Letter to Client	
Extra Case Details	I         19 Feb 2016         15x41         CN         Review File	G16 🖗 ^ 🗹 Preview Document	
Associates	S ii 12 Feb 2016 16:01 CN Letter to Lending institution	G04 P	
Oritical Information	✓ 12 Feb 2016 15:44 CN Letter to Client	G02 P	AM '
🗳 Know Your Client	S 8 65 Feb 2016 15:41 CN Letter to Solicitor	G03 P	
A/c Ledger	S 😨 05 Feb 2016 16:00 CN Meeting	G27 P 12 February 2015	
🛿 Time Ledger	S I 03 Feb 2016 15:38 CN Letter to Client	G02 P	
😺 Debt Ledger	S 8 01 Feb 2016 15:50 CN Letter to Client	G02 🔛 Jack Flynn	
Reserve Ledger	S 🐨 25 Jan 2016 16:00 CN Court Date	G26 P 10 Rose Lawn	
Undertakings	S 18 Jan 2016 16:01 CN Attendance Sheet?	G20 🖓 Blanchardstown	
	S 30 Dec 2015 16:02 CN Letter to Doctor ?	G08 P Dublin 17	

3. **Input** the search terms in the **Search box**. The search results will update in real time, showing all documents containing any of the search terms.

Client/Case	Case: TJF001/0001	TJ Fox									
Case Diary	Outstanding debt to PTSB Bank.										
🚺 Document Manager	🕼 atten	🙆 💛 🔲 Search text								Standard View	1
le Current Client Details	Type 🖉 Document Name		Diary Date	Version	Date 💌	Document Class	Source	From	То	Subject	
Current Case Details Other Case Details	• 📴 Attendance Log		14 Jul 2015	1	14 Jul 2015	Reports	Case			<mark>Atten</mark> dance Sheet	^
Associates		troductory Meeting_2634	13 Jul 2015	1	06 Jul 2015	General	Sent E-mail	training@keyh	Brenda Hartley	Outgoing Email with an Attachmen	it
Critics formation		troductory Meeting	.06 Jul 2015		06 Jul 2015	Instruction Sheets	Case		A second and	Initial Attendance	

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

### How to Sort by Column Heading

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

Ca	Case: TJF001/0001												
			Outstanding debt	to PTSB Bank.									
5	S Search text Standard View												
	Туре	e Ø	Document Name	Diary Date	Version	Date 🔻	Document Class	Source	From	То	Subject		
		0	Test Attachment	16 Jul 2015	1	16 Jul 2015	General	Sent E-mail	brenda@keyh	training TT. tr	Test Attachment		
	F		Precendent Document	14 Jul 2015	1	14 Jul 2015	Pleadings	Case			Precedent Document		
Þ	P		Attendance Log	14 Jul 2015	1	14 Jul 2015	Reports	Case			Attendance Sheet		
	F		Vendor Instruction Sheet	14 Jul 2015	1	14 Jul 2015	General	Case			Create Vendor Instruction Sheet		
	F		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 confirmation		
	17	1	Conflict Search_2639	13 Jul 2015	1	06 Jul 2015	General	Sent E-mail	training@keyh	Brenda Hartley	Outgoing Email.		
	F		Attendance for Introductory Meeting_2634	13 Jul 2015	1	06 Jul 2015	General	Sent E-mail	training@keyh	Brenda Hartley	Outgoing Email with an Attachment		

2. To remove the sort, **right-click** the column heading and choose **Clear Sorting** from the pop-up menu.

#### **How to Filter Columns**

- 1. Move your cursor to the column heading required, so that the *filter pin* appears.
- 2. Click the filter pin and select the required filter from the drop-down menu.

Sear	ch	Search text										
Туре	V	Document Name	Diary Date 🔻	Version	Date	Document Class			1	То	Subj	
X		Expenses Claim Form 2015 from 1st July2015	16 Jul 2015	1	30 Jun 2015	General	(Blanks)	anks)		keyh	training TT. tr	Test
	0	Test Attachment	16 Jul 2015	1	16 Jul 2015	General	(Non blanks) Client Letters			keyh	training TT. tr	Test
P		Precendent Document	14 Jul 2015	1	14 Jul 2015	Pleadings	Conflict	Search				Prec
P		Attendance Log	14 Jul 2015	1	14 Jul 2015	Reports	General					Atter
P		Vendor Instruction Sheet	14 Jul 2015	1	14 Jul 2015	General		on Sheets			Crea	
P		Document2_2661_2662	13 Jul 2015	1	13 Jul 2015	General	Letters/Interparty Correspondance Memo					Doci
5		Conflict Search_2639	13 Jul 2015	1	06 Jul 2015	General	Pleading	15		keyh	Brenda Hartley	Outc
2	0	Outgoing Email.	13 Jul 2015	1	13 Jul 2015	General	Reports	~		keyh	Brenda Hartley	Outc
P		Attendance for Introductory Meeting_2634	13 Jul 2015	1	06 Jul 2015	General				keyh	Brenda Hartley	Outc
1	0	Outgoing Email with an Attachment	13 Jul 2015	1	13 Jul 2015	General		Sent E-mail	training@	keyh	Brenda Hartley	Outc
		Conflict Search	06 Jul 2015	1	06 Jul 2015	Conflict Search		Case				Conf
P		Attendance for Introductory Meeting	06 Jul 2015	1	06 Jul 2015	Instruction Shee	ts	Case				Initia
P		Letter to Lending Institution confirming appoint	06 Jul 2015	3	13 Jul 2015	Letters/Interpart	ty Corr	Case				Lette
P		Letter to Lending Institution confirmating appoin	06 Jul 2015	1	06 Jul 2015	Letters/Interpart	ty Corr	Case				Lette

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

#### How to Group by Column

- 1. **Right-click** the column heading you want to group by, to show the pop-up menu.
- 2. Select **Group By This Column**. In the following example, the documents are grouped by document class.

₽↓	Sort Ascending
Z↓	Sort Descending
2¥	Clear Sorting
8	Group By This Column
-	Show Group Panel
1	Show Column Chooser
₽	Best Fit
	Best Fit (all columns)
۴	Filter Editor

i											
	Туре	Document Name	Vers								
	Document Class: Attendance Sheet										
	Document Class: Letters/Interparty Correspondance										
	► Docu	ment Class: Medical Reports									

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

	Туре	Document Name	Version	Diary Date	Date	Source	From	То	Subject			
	► Docu	ment Class: Attendance Sheet										
Þ	Document Class: Letters/Interparty Correspondance											
		Letter to Client	1	20 Apr 2010	29 Jan 2011	Case			Letter to Client re advice			
		Letter to Solicitor	1	24 Apr 2010	29 Jan 2011	Case			Letter to Land Registry			
		Letter to Solicitor	1	10 Jun 2010	29 Jan 2011	Case			Letter to Solicitor			
		letter from hospital consultant	1	04 Jul 2011	04 Jul 2011	Received E-m	Martina Winte	martina@keyh	doctors report			
		Letter to insurance company	1	08 Oct 2014	23 Nov 2014	Case			Letter to insurance compan			
		Letter to Barrister	1	13 Nov 2014	23 Nov 2014	Case			Letter to Barrister			
		Letter to Doctor	1	23 Nov 2014	01 Oct 2014	Case			Letter to Doctor			
	► Docu	ment Class: Medical Reports										

4. It is possible to nest group levels: first group by one column heading, then right-click the next required column heading and click **Group By This Column**. In the following example, the documents are grouped first by **Document Class** and then by **Source**.

▲ Document	Document Class: Letters/Interparty Correspondance											
∡ Sourc	e: Case											
P	Letter to Client	1	20 Apr 2010	29 Jan 2011			Letter to Client re advice					
	Letter to Solicitor	1	24 Apr 2010	29 Jan 2011			Letter to Land Registry					
	Letter to Solicitor	1	10 Jun 2010	29 Jan 2011			Letter to Solicitor					
(P	Letter to insurance company	1	08 Oct 2014	23 Nov 2014			Letter to insurance company					
	Letter to Barrister	1	13 Nov 2014	23 Nov 2014			Letter to Barrister					
(PE	Letter to Doctor	1	23 Nov 2014	01 Oct 2014			Letter to Doctor					
✓ Source	e: Received E-mail											
	letter from hospital consultant	1	04 Jul 2011	04 Jul 2011	Martina Winte	martina@keyh	doctors report					

To remove the grouping, right-click in any column heading and select **Show Group Panel** from the pop-up menu. The group panel will contain each of the headings by which the documents are grouped (*Document Class* and *Source* in this example). Right-click each of these in turn and select **Ungroup** from the pop-up menu. It is also possible to drag the heading back onto the Heading Row once the Show Group Panel is visible.

₽↓	Sort Ascending	-	3	Search		💝 🗌 Search text	
Z↓	Sort Descending		[	Document Clas		Full Expand	]
2¥	Clear Sorting			Type 🖉		Full Collapse	
8	Group By This Column		•	<ul> <li>Docume</li> <li>Docume</li> </ul>		Sort Ascending Sort Descending	
	Show Group Panel			► Docume	A¥ Z¥	Clear Sorting	
Ē	Show Column Chooser			<ul> <li>Docume</li> <li>Docume</li> </ul>	~	Ungroup Hide Group Panel	spondance
	Best Fit		_	<ul> <li>Docume</li> </ul>	-	Show Column Chooser	spondunce
	Best Fit (all columns)			► Docume		Best Fit (all columns) Group Summary Editor	-
Ŷ	Filter Editor			Docume	Ŷ	Filter Editor	-

#### How to reclassify documents

- Select the document or documents you want to reclassify and click **Reclassify** on the Home tab, to bring up a list of the available document categories.
  - TIP: To select multiple documents: Hold down **CTRL** on your keyboard and click each of the documents to be selected.
- 2. **Search** for the required category, if necessary, and select it.
- 3. Click **OK**.

#### How to change the Document Properties

- 1. Select the document or documents whose properties you want to amend.
- 2. Click **Properties** on the Home tab, to show the Document Properties dialogue box.

(	)	Change Category	×
	Search		
	Class Code	Class Description	
Þ	ATT	Attendance Sheet	^
	CFS	Conflict Search	
	DOC	Document	
	ENG	Engagement Letters	
	GEN	General	
	LTR	Letters/Interparty Correspondance	
	MED	Medical Reports	
	MEM	Memo	. ~
		Ok Cancel	3

	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	
Ē	Ok Cancel	

- 3. You may amend the **Document Name**, **Date**, **Document Class** or **Type**. To change the Document Class, select from the drop-down list, which will show the available classes.
- 4. The properties on the **File Information** tab are read-only; you may copy the document name and path to the clipboard.

### How to email Document(s)

- 1. Select the document or documents you want to email then click **Email** on the Home tab.
  - TIP: To select multiple documents: Hold down CTRL on your keyboard and click each of the documents required.
- 2. Outlook will create a new email with the document(s) attached; complete the email as normal and send.

# **The Brief Wizard**

This tool automates the task of generating a brief to counsel, saving you time. It amalgamates all the required documentation in chronological order into relevant sections, complete with a cover page, table of contents and pagination.

### Important Steps for preparing your Brief

- 1. Review your documents in the **Document Manager** and ensure the necessary files are classified and the Document Date is correct as it will be in your brief.
- 2. If you cannot view or open a document from the Case Diary or Document Manager screen you will not be able to use this document in your brief.
- 3. Once you begin to generate your Brief you should not use your PC for any other purpose until the brief is completed. Several different programs will be used to generate the brief and running another program is likely to cause disruption to generation of the brief.
- 4. Please review the earlier part of this chapter (Document Manager, particularly p. 128 above) for details on how to rename and reclassify a document.

If you need assistance adding **Document Classes** please contact your Keyhouse administrator or casesupport@keyhouse.ie

#### Assembling a Brief

- 1. **Open** a case in the case diary.
- 2. Click **Document Manager** on the Navigation panel.

	<b>ö</b>	og Maintain Setup Help	🖉 Use Adobe P	DF Viewer							
rint Export to PDF St	tart Timer Post Accounts	Time Properties Reclassify Email Compile Brie Document(s) Brief	ef Preview		MS Word W	orkshare					
Client/Case	Case: BAS	R002/0001									Tel: 01-5
Case Diary		Sale of 1 His	gh Street, Kells, Co M	leath							F/e: CN
Document Manager	Search	h 😔 🗌 Search text									Standard View
Current Client Details	Type	Document Name	Diary Date	Version D	Date 🔻	Document Class	Source	From	То	Subject	File Location
Current Case Details	6	afdafd	30 Nov 2015	1 3	30 Nov 2015	General	Case			Test Doc	t:\keyhouse\client documents\BAR002\0001\afdafd
ther Case Details	E	Letter to Client Re Sale	30 Nov 2015	1 3	30 Nov 2015	General	Case			Test Doc	t:\keyhouse\client documents\BAR002\0001\Letter
ssociates	R	Letter to Bank re Redemption Value	30 Nov 2015	1 3	80 Nov 2015	Letters/Interparty Corr	Case			Letter to Bank re Redemption Value	t:\keyhouse\client documents\BAR002\0001\Letter
ritical Information	۰ 🖻	Contract of Sale	30 Nov 2015	1 3	30 Nov 2015	Pleadings	Case			Contract of Sale	t:\keyhouse\client documents\BAR002\0001\Contra
now Your Client	E	Contract for Sale Draft 2	30 Nov 2015	1 2	23 Nov 2015	Opinions	Case			Contract for Sale Draft 2	t:\keyhouse\client documents\BAR002\0001\Contra
/c Ledger	1	Contract for Sale Draft 1	30 Nov 2015	1 2	23 Nov 2015	Opinions	Capture			Contract for Sale Draft 1	t:\keyhouse\client documents\BAR002\0001\Contra
ime Ledger	1	Letter to Insurance Company	18 Nov 2015	1 2	23 Nov 2015	Letters/Interparty Corr	Case			Letter to Insurance Company	t:\keyhouse\client documents\BAR002\0001\Letter
ebt Ledger	6	Letter to Local Authority	19 Nov 2015	1 2	23 Nov 2015	Letters/Interparty Corr	Case			Letter to Local Authority	t:\keyhouse\client documents\BAR002\0001\Letter
eserve Ledger	1	Letter to Lending Institution	20 Nov 2015	1 2	23 Nov 2015	Letters/Interparty Corr	Case			Letter to Lending Institution	t:\keyhouse\client documents\BAR002\0001\Letter
ndertakings	12	Letter to Solicitor	23 Nov 2015	1 2	23 Nov 2015	Letters/Interparty Corr	Case			Letter to Solicitor	t:\keyhouse\client documents\BAR002\0001\Letter
	- 12	Letter to Client	20 Nov 2015	1 2	20 Nov 2015	Client Letters	Case			Letter to Client	t:\keyhouse\client documents\BAR002\0001\Letter
Tasks Search/Open	_										

- 3. Click **Compile Brief** on the Document Manager Home tab.
- 4. The Brief Assembly Wizard will start with a welcome screen. Click **Next** to continue.
- 5. If Brief templates have been set up on the system, you may either select one or check **Do not use a Brief Template**.

New Bri	ef Wizard		×
Keyhouse			Brief Assembly Wizard
Using a Brief Template			
Brief Template	Туре	Sequence	Section
Booklet of Title	4	-1	Interparty Correspondance
Personal Injury Litigation	L.	3	Pleadings
	<u> </u>	4	Reports
<ul> <li>Do not use a Brief Template</li> </ul>	<		>
Cancel			Previous Next

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



- Do not copy any documents in the brief: No documents will be added to the brief automatically but you will be able to drag and drop documents from the Section Not included in this Brief into the appropriate section.
- Copy documents into the brief when their Class matches a brief section: Any document whose Document Class matches a section of the Brief will automatically be copied into that section.
- Copy all documents into the brief and create sections as required: Sections will be created for each Document Class which applies.

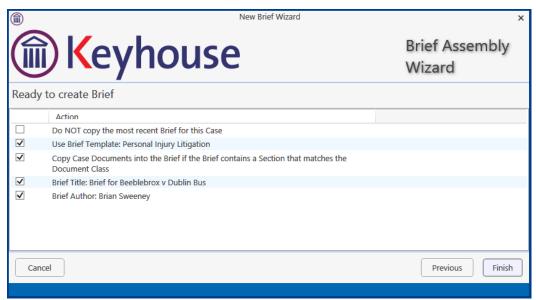
 $rac{\sqrt{2}}{\sqrt{2}}$  Tip: for further information on each option click the question mark icon beside it.

	New Brief Wizard	×
	Keyhouse	Brief Assembly Wizard
Brief Infor	mation	
Title:	Brief for Beeblebrox v Dublin Bus	
Author:	Brian Sweeney	
Location:	\\keydev020\c\keyhouse\client documents\BEE001\0008	
Created:	06 Jan 2015 15	
Published:	06 Jan 2015 15	
Cancel	]	Previous Next

5. Click **Next** to continue to the **Brief Information** screen.

You may accept the default information or amend as required.

6. Click **Next** to continue to the final screen of the wizard, which will contain a summary of the options you have selected. You can make changes by checking and unchecking the boxes or click **Previous** to go back to an earlier screen.



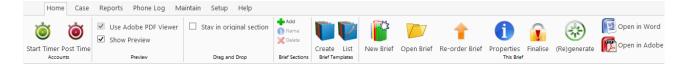
7. When you are satisfied, click Finish.

	Keyhouse Case Management (CN - Carol Nolan - 0424 / 03.06)						
Home Case Report	Home Case Reports Phone Log Maintain Setup Help						
<ul> <li>✓ Use Adobe PDF Viewer</li> <li>✓ Show Preview</li> <li>Preview</li> </ul>	Stav in original section          •• Ads •• Staver •• Staver						
olient/Case € Client/Case	Case: FLY001/0001 Jack Flynn Sale of House at: 4 The Mews, Rathfarnham, Dublin 6						
Document Manager	Brief: Brief for Sale of House at: 4 The Mews Rathfamham Dublin 6				Brief Sections		
🗞 Current Client Details 🌭 Current Case Details	Search						
🎒 Other Case Details	Type Document Name	Class	Document A	Action Pri	Action Type		
Associates Oritical Information	Section: 001 - Client Correspondence (3 documents)				^		
A/c Ledger	Section: 002 - Letters/Interparty Correspondance (9 documents)     Section: 999 - Documents Not Included in this Brief (25 documents)						

8. The sections in the brief will be displayed.

#### **Brief Home tab**

The Home tab in the Brief:



### **Brief Sections**

#### How to Add a Section

- 1. Click Add on the Home tab.
- 2. Name the new section.
- 3. Click **OK**.
- 4. The new section will appear in the **Section** list.

#### How to amend a Section Name

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

(	Case: BE	2001/0008 Zaphod Beeblebrox Beeblebrox v Dublin Bus			
В	rief: Brief f	or Beeblebrox v Dublin Bus		Brief Sectio	ns
[	Search				
	Туре	Document Name	Class	Document	
Þ	Sect	ion: 001 - Client Letters			
	Sect	ion: 002 - Documents			
	Sect	ion: 003 - Engagement Letters			
	→ Sect	ion: 004 - Instruction Sheets			
	→ Sect	ion: 005 - Letters/Interparty Correspondance			
	→ Sect	ion: 006 - Memo			
	→ Sect	ion: 007 - Motion papers			

- A list of sections will be expanded.
   Tip: To Show the list permanently click the pin.
- 3. Select the section you want to rename.
- Click Name on the Home tab. Alternatively, right-click the section and choose Section Name from the pop-up menu.
- 5. Name the new section and click **OK** to confirm.

Brief:	Brief f	or Beeblebrox v Dublin Bus			Brief Sections
			Section		(*)
P	Cove	r Letters			Pin to fix
	Client	Letters			
Ű.	Docu	ments			
	Engagement Letters				
<u>u</u>	Instru	iction Sheets			
	Letters/Interparty Correspondance				
<u>u</u>	Mem	0			
	Motio	on papers			
	Docu	ments Not Included in this Brief			
Sea	rch		]		
Тур	oe 🛛	Document Name		Class	Document
F 1	Sect	ion: 001 - Client Letters			^
1	Sect	ion: 002 - Documents			
	Sect	ion: 003 - Engagement Letters			



#### How to delete a Section

- 1. Click Brief Sections on the right of the brief screen (see How to amend a Section Name, p. 152 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.

Delete Brief Sectio	n?
2	Are you sure you want to delete Section "Cover Sheet"?

#### 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. 152 above)
- 2. Select the **section** you want to move.
- 3. Use the buttons in the Move section of the Home tab to change the position of the section in the brief.



Move the selected section **to the top** of the list of sections.

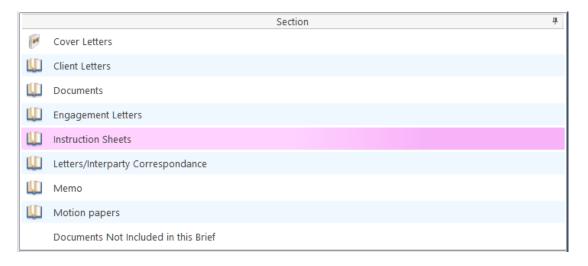
Move the selected section **up one position**.

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

Bottom 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. 152 above)
- 2. Pin the Brief Sections so that they remain visible.
- 3. In the lower part of the window open the section containing the document which you want to move, by clicking on the arrow to the left of the section.



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).

Туре	Document Name	Class	Document
Section: 001 - Client Letters			
Section: 002 - Documents			
_ ⊿ Se	ction: 003 - Engagement Letters		
	Terms of Engagement	Engageme	30 Sep 2014
Section: 004 - Instruction Sheets			

#### How to flag as a Cover or Main

- 1. Click Brief Sections on the right of the brief screen (see How to amend a Section Name, p. 152 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.

📥 Add
<ol> <li>Name</li> </ol>
🗙 Delete
ake Main
Brief Sections

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

### **Brief Options**

#### Save current Brief as Template

- 1. Click **Create** on the *Brief Templates* section of the Home tab.
- 2. Edit the details in the dialogue box Create a New Brief Template

	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 **Document Manager** on the Navigation panel to view the Document Manager.
- 3. Click **Compile Brief** on the Home tab in *Document Manager*. The *Select Brief* screen will appear.

	D		Select Brief (Right-click for Options)	х			
Ν	ew Br	ief Open Brief					
		Title	Description				
F		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**.
- **Note** if you are already working in the brief screen, you may click **Open Brief** on the Home tab.

## **Generate the Brief**

Before you generate the Brief, if you have any Microsoft Office applications running (e.g. Word, Excel, Powerpoint etc), save your work and close the application(s).
 FAILURE TO DO THIS MAY RESULT IN LOSS OF DATA.

Once you begin to generate your Brief you should not use your PC or laptop until the brief is completed. Keyhouse calls on a number of programs during brief generation and trying to view/use another program will cause disruption to the brief.

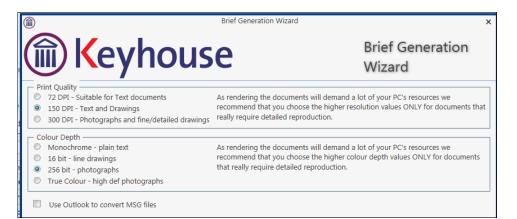
#### How to (Re) Generate a Brief

- 1. Click (Re)Generate on the Home tab.
- 2. The Brief Generation Wizard will start.

The system may select some documents for preprocessing and ask if you want to select others which have not automatically been selected. The automatically selected documents cannot be unselected but you may tag others for preprocessing by checking the box beside each.



- 3. Click Next.
- 4. Select the *print quality* and *colour depth* required.



Check the box to use Outlook to convert MSG files.

5. **Click Next.** A screen will show the progress of the document preprocessing.

Pre-processing docur	eyhouse	
Current Section:	Attendance Sheet	
Current Document:	Attendance Sheet	
_		

This option allows you to ov

**Brief Generation** 

Previous

Page Numbering

Section - Desc - Page

Page

Page Section - Page Next

3 lines 4 lines

Wizard

Brief Generation Wizard

6. When pre-processing has been completed, you will have the opportunity to set the print order of the brief, the contents and position of the footer and the alignment of columns in the table of contents.

Keyhouse

No offset \_\_\_\_ Depending on your PC's printer drivers, the page numbering can sometimes appear too far do number and other footer information here.

Footer Font Size: 7 
Bold

NO footer

Order Documents as specified during Brief Maintenance

Page Footer and Table of Content

Section - Desc - Page 🔹

Left-Align TOC columns

Page Numbering –

Include Totals

Cancel

- The documents in each Section may be printed in ascending date order, in alphabetical order by filename or in the order in which they were added to the brief while it was being assembled or maintained.
- The footer offset is the minimum number of lines that must be maintained

that must be maintained between the footer and the physical end of the page.

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

Check the box to include totals (e.g. "Page 5 of 158").

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

Print Order	
Order Documents as specified during Brief Maintenance	T.
Order Documents as specified during Brief Maintenance	2
Order Documents by File Date in each Section	
Order Documents by File Name in each Section	

- 7. When you have selected the desired options for the print order of documents, the contents of the footer and the table of contents, click **Next**.
- You will now choose the type of output. The options are a *Word* document, a *PDF*, or both of these. You may also choose to produce a folder of documents instead of a single document.

- :	Select your Output	
	Produce both a Word and a PDF Document	Select your preferred output.
_	Produce a Folder	
	Produce a Word Document	
	Produce a PDF Document	
	Produce both a Word and a PDF Document	
		,

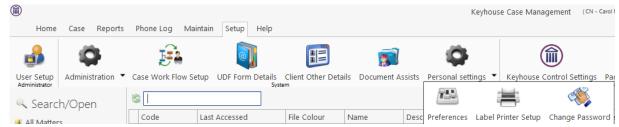
9. Click Finish. The brief will now be generated. This may take some time

# Chapter 18 – Personalising your Keyhouse

# **Setting your Preferences**

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

- 1. Go to the Setup Tab and select Personal Settings
- 2. Select Preferences



3. The following screens will appear

	Preference	×		Preference X
Main Application User Preferences Other User Prefe	erences		Main Application User Preferences Other User Pref	erences
Show Start Up Page			Remember Sync Document Name With Subject Line	
Show Notification to Open Case Diary Attachment	$\checkmark$		My Briefcase	
Use Enter in Search Boxes				Do Not Show Briefcase Notification
Launch Alarm System at Startup			Show Case Associative Contact Details	
	V		Retain Last Advanced Matter Search	
Disable animated images	☐ (Spinning clocks, etc)		My Overview Settings Budget Daily Hours (HH:MM) OS Invoice Limit	Current WIP Limit Draft Invoice Limit
			Choose which has to shown first on preview panel in SDLT XML path	
	<u>O</u> K	Cancel		<u>Q</u> K <u>Cancel</u>

4. Set the Preferences required and click OK.

### **Creating User Views**

Keyhouse gives you the option to change the views on screens to allow you to find and see information more easily. It allows the user to create views tailored to their requirements. All new views must be saved or they will revert back to the original view when you leave the screen. View can be created where

ever you see this icon. 🗔

Address Close Date

Closed<sup>®</sup> File Colour File Number id Old Ref Phone No.

# **Creating a View**

1. Go to the screen where the view is to be created

Home Case Reports	e Case Merge Case	â <u>/</u>													
Search/Open	8													Open Ca	ises 🗌
All Matters	Code	Last Accessed	File Colour	Name	Description	Fee Code	Fee Earner	File Ref	User2	User3	Started	Department	Work Type	Original Closed Date	
My Matters	BAR002/0001	21 Jan 2016 14:27:05		Kevin Barrett	Sale of 1 High Street, Kells, Co Meath	CN	Carol Nolan				20 Nov 2015	Conveyancing	Sale		
Recent Matters	FLY001/0001	21 Jan 2016 14:16:23		Jack Flynn	RTA on Ferrybank Duel Carrageway	CN	Carol Nolan				23 Dec 2015	Litigation	Accident		
Contacts	AB8001/0005	17 Dec 2015 11:27:55		George J Abb	RTA The Rise, Stillorgan	BS	Brian Sween				23 Sep 2010	Litigation	Accident		
Associates	BEC001/0001	30 Nov 2015 16:42:16		Angela Beck	Sale of 56 Church Street, Rathgar	BS	Brian Sween				11 Jan 2007	Conveyancing	Unknown Wor		
Advanced Search	BLA001/0001	20 Nov 2015 14:34:32		Gordon T. Bla	RTA Walkinstown Crossroads, G. Black	BS	Brian Sween	1234T			08 May 2010	Litigation	Road Traffic		
My Invoices	DUN001/0001	02 Sep 2015 12:41:34		Dunnes Store	Slip & Fall on Frozen Food Aisle	BS	Brian Sween				16 Feb 2015	General	Accident		
My 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		
Phone Log	IBS001/0024	02 Sep 2015 10:59:40			IBS -v- Martin Smyth	BS	Brian Sween				22 May 2012	Debt	Debt Recovery		
Firm 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		
Strong Room	SMY001/0001	01 Sep 2015 11:07:22		Laura Smyth	Laura Smyth v Joe Byrne	MK	Mark Kelly	smy001			01 Sep 2015	Family Law	Circuit Court		
Document Search	NOL001/0001	28 Aug 2015 12:43:35		Paula Nolan	Paula Nolan V Joe Smith	AM	Anne Mellon	6666666			04 Sep 2014	Debt	Circuit Court		
Template Library	ZZT001/0000	28 Aug 2015 12:37:33			Document matter	SK	Stephen Ke				27 Mar 2010		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		
	277777777772	14 Mar 2014 09:00:58				BS	Brian Sween				22 Dec 2005	Commercial	Accident		
	BL0001/0004	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	BS	Brian Sween	PEC1			14 Aug 2013	Conveyancing	Advice		
	FIN001/0003	14 Mar 2014 08:59:51		Finance Depa		BS	Brian Sween	TALT I			25 May 2011	Finance	Debt Collection		
	FIN001/0001	14 Mar 2014 08:59:47				BS	Brian Sween				09 Nov 2011	Finance	Debt Collection		
	ABB001/0004	15 Jan 2014 15:29:19			EPA - Mary James and David Jones	JP	Justin Phelan				22 May 2008	Conveyancing	Re-mortgage		
	EVE001/0003	18 Nov 2013 15:21:25			Sale of Ravensdale Estate, Wicklow, Co		Brian Sween	633003	120056	49575566	02 Dec 2005	Finance	Purchase		
	AAA001/0003	16 NOV 2015 15:21:25			Landlord Dispute	MW	Martina Win	032001	120030	49575500			Action		
	AAA001/0001 AAA001/0002				Landlord Dispute New Lease 44 Main Street Dun Laoghaire		Martina Win				06 Jun 2010 31 Jan 2010	Litigation Commercial	Lease		
	AAA001/0002 AAA001/0003					CN	Carol Nolan								
	AAA001/0003 AAA002/0001				Slip and fall incident		Brian Sween				16 Feb 2015	General	General Action		
	AAA002/0001 ABA001/0001				Derek Bradley - export to USA Freight c	AM					15 Feb 2012	Litigation			
	ABA001/0001 ✓ [Closed] <> 'Y			David Abraha	Family Law	AM	Anne Mellon				20 May 2011	Family Law	Action		
	I [closed] <> 1														
	UDF Field														
	Search														
	Prompt				Value					Text					
Tasks	Purchase Price				275000					27500	0				
Search/Open															
	-														
Client/Case															

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 Reports	Phone Log Ma	intain Setup Help			Keyhouse Case Mar	agement (	CN - Carol Nolan - 00.	01 / 07:29)				Quick Search (Ctrl + Q)
م المعنى الم فونين Case of Copy Case Move Case of Case	Case Merge Case	Case Import	Search									
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	Cale of 1 Migh Street Kells C		l Nolan	İ.	20 Nov 2015	Conveyancing	Sale		
Recent Matters	FLY001/0001	21 Jan 2016 14:16:23	Jack Flynn	RTA on Ferrybank Duel Carra		l Nolan		23 Dec 2015	Litigation	Accident		
Contacts	ABB001/0005	17 Dec 2015 11:27:55	George J Abb	RTA The Rise, Stillorgan		Sween		23 Sep 2010	Litigation	Accident		
Associates	BEC001/0001	30 Nov 2015 16:42:16	Angela Beck			Sween		11 Jan 2007	Conveyancing	Unknown Wor		
Advanced Search	BLA001/0001	20 Nov 2015 14:34:32	Gordon T. Bla	RTA Walkinstown Crossroads 🔠 S	how 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 Ai 🛅 S	how Column Choose	er h Sween		16 Feb 2015	General	Accident		
My Cheques	ODW001/0001	02 Sep 2015 11:59:04	Sean O'Dwyer	Re-mortgage 54 Wellington I 🚍 🔋	lest Fit	n Phelan		14 Jan 2011	Conveyancing	Re-mortgage		
Phone Log	IBS001/0024	02 Sep 2015 10:59:40	Interim Busine	IBS -v- Martin Smyth	lest Fit (all columns)	Sween		22 May 2012	Debt	Debt Recovery		
Firm Undertakings Strong Room	ACC001/0001	01 Sep 2015 12:16:54	Accord Music	Purchase New office 56 Second stree		martina Win		14 Jan 2010	Commercial	Purchase		
	SMY001/0001	01 Sep 2015 11:07:22	Laura Smyth	Laura Smith v Joe Byrne	MK	Mark Kelly	smy001	01 Sep 2015	Family Law	Circuit Court		

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

5	ŝ								
	Code	Last Accessed	Namehone No.	Description					
Þ	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					

4. To reposition a column, click on the column and drag it to its required location, again using the blue arrows as a guide.

5. Once all required headings are in position, click on the view button <sup>III</sup> in the top right corner of the screen.

Open Cases 🔲

- 6. Right click on **View** and click on **Add or Edit**.
- 7. In the Name box enter the name of the view.
- 8. If the view is to be the default view, click the **Default** box the select **Add View**.
  - Note if you have Administration Rights you can make the view available to all users by clicking Shared View.

Name: My Open Cases		Default 🗌 Shared Vi	ew Add	View 🛛
	View		Default	Shared
Open Cases			$\checkmark$	$\checkmark$
Closed Cases				$\checkmark$
Open and Closed Cases				

**Note** It is also possible to filter by headings and save the result as a view.

## **Change a View**

- 1. Make the required changes.
- 2. Click on the View Icon
- 3. Right click on the View to be changed and select Add or Edit
- 4. Click Change View.

Name: My Open Cases	🗹 Default 🗌 Shared View Change View 😣
View	Default Shared
My Open Cases	
Closed Cases	
Open and Closed Cases	$\checkmark$
Open Cases	$\checkmark$

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.

# **Chapter 19 – Closing Case Management**

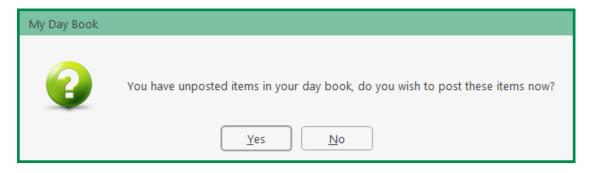
# **Closing Keyhouse**

When closing the Case Management system the options the user gets depends on the Preferences set.

- 1. To close the system, click on the X in the top Right Corner of the screen.
- 2. The following screen will appear

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.