

Keyhouse End User

MANUAL

VERSION NO: 5.4.3.1

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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.

Navigating the Search Screen

🎳 All Matters	Click on All Matters to list all matters.
📜 My Matters	Click on My Matters to list all your matters
🐻 Recent Matters	Click on Recent Matters to list matters recently accessed.
Contacts	Click on Contacts to list all your clients and matters
👗 Associates	Note this is for Fee Earners only. Click on Associates to list all associates on the Database
🍭 Advanced Search	Click on Advanced Search to perform a more specific search on all matters.
🙌 My Invoices	Click on My Invoices to add, view or edit any draft invoices you have.
🧇 My Cheques	Click on My Cheques to add, view or edit any draft invoices you have.
😚 Phone Log	Click on the Phone Log to add or view items in the phone log
🍈 Firm Undertakings	Click on Firm Undertakings to see all undertakings given or received by the organisation
🕒 Strong Room	Click on Strong Room to view or add items in your strong room.
🔞 Firm Undertakings	Click on Firm Undertakings to see all undertakings given or received by the organisation
🙆 Document Search	Click on Document Search to search all documents.
🄝 Template Library	Click on Template Library to Search and preview your precedent bank of documents.

Chapter 1: Getting Started

Opening Case Management

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



(1111	
) <mark>K</mark> eyhouse
Please login I	to Keyhouse
	Log in using your Windows ID
	OR
Handler:	
Password:	
	Link this login to your Windows Login
	Login

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.

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	- 0	Jack Flynn	Purchase of 16 The Haywain, Terenure,	Carol Nolan	CN	FLY002/001

6. Task Manager will show you your task list.

													Keyhouse Case Management (CN - Carol Nolan - 0000 / 0000)	Quick Search (Ctri +	+ Q))	- 6
Home	Case	Reports	s Pa	rtners	Phor	ne Log 🛛 🕅	Maintain	Setup	Help							
2	ŧ	0	H	R		0										
/ Item 🕶 Actions	Print	Captu		Docum		te Action										
Tasks			На	ndler	Carol N	Volan	√ ⊘ 0.	utStandir	ng Only							
My Tasks			5	Searc	h										Standard \	View 🗌
Team tasks				C A.	. P D	Date		Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action	Diary Date	F
Day's tasks Next week's			,										AAA Securities Ltd Landlord Dispute			. 1
Next month Overdue ta:	h's tasks				1	30 Mar	2016	10:21	FLY001/0001	CN	сом	CN	Jack Flynn Sale of 10 Rose Lawn, Blanchardstown, Dublin 17	Review File	30 Mar 2	P.
Outstanding Last week's	g tasks					29 Mar	2016	09:39	ABB002/0004	CN	сом	CN	Abbie Lynch RTA The Rise, Stillorgan	Value: €100.00 , Comment: 1st Payment , Date: 22/03/2016	29 Mar 2	.Ρ
Last month						29 Mar	2016	09:39	ABB001/0004	CN	сом	CN	George J Abbott EPA - Mary James and David Jones	Value: 650.00 , Comment: Last Payment , Date: 24/03/2016	29 Mar 2	P.
My Overvie	2WV					29 Mar	2016	09:39	ABB001/0002	CN	сом		George J Abbott Purchase 7 Church Street, Rathgar, Dublin 6	Value: €150.00 , Comment: 3rd Payment , Date: 22/03/2016	29 Mar 2	.Ρ
m	~~~~		-	-	m	MA	~~	09:30	mener	m	gover	an	alecced Abbrether more and	manance compression and market	- un	man

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.

Home Case	Reports	Partners Phone Log Maintain Setup He		Case Management (CN - Carol Nolan - 0000 / 0000)				Quick Search (Ctrl	- (1) -
Item - Print	0	re Generate Complete Action	7						
Tasks		Carol Nolan						Friday	, 22 Apr
/ly Tasks			Case Alert			Task/Alert		Performar	ce
am tasks		Open matters			29 N	to, of over due tasks	49	My time day book	0:00
y's tasks		My dormant matters						Time recorded this week	0:00
y s tasks xt week's tasks									
xt week's tasks		No. of Effectively complete Matters				critical tasks		Time recorded this month	0:00
erdue tasks		No. of cases where expected invoice date has pa	ssed		1 <u>C</u>	Court dates	2	Time recorded this year	0:57
tstanding tasks		No. of cases with no estimated fee			26 <u>H</u>	ligh priority tasks	11	Admin time recorded this Week	0:00
t week's tasks		No. of cases approaching estimate fee			0 P	hone message	2	Admin time recorded this month	0:00
t month's tasks		No. of cases approaching lockup value limit			0 -			Admin time recorded this year	0:10
Tasks		No. of clients that require money laundering che	- the			Indertakings	4	Contraction of the second s	
overview 0			CES			tatute date approaching		Fees issued current month	0
		No. of cases with no estimate given			28	tatate date approaching			
			Recent Matters					Fees issued last month	0
		Code	Name	Description				Fees issued Year to Date	0
		ABA001/0001	David Abrahams	Family Law	^				
		FLY001/0001	Jack Flynn	Sale of 10 Rose Lawn, Blanchardstown, Dublin 17				Outstanding invoice	50,717
		AAA001/0001	AAA Securities Ltd	Landlord Dispute				Outstanding fees	41,063
		ZAC001/0002	Irina Zacawski	Purchase & Planning application for Unit 6 Blackrock Shopping Centr				Debtors days	2,140
		AB8002/0004	Abbie Lynch	RTA The Rise, Stillorgan				Current work in progress	4,674
		BOIBUS/0002	Bing Oil Industries Business Banking	Advice re Agreement				Draft invoice	0
		ZAC001/0001	Irina Zacawski	Divorce				Diantinvoice	0
		BLO003/0001	James Bloggs	Purchase of Wood Drive, Dublin				O altra balance	
		TOB001/0001	Avril Tobin	Sale of The Cottage, Ashbourne, Co Meath				Outlay balance	455
		TOB001/0002	Avril Tobin	Purchase of 1 High Street, Naas				Current lockup value	55,846
		TEG001/0001	Peter Tegg	RTA on N4 at Lucan					
		ZZT001/0000	Test New CLient	Document matter					
		BLA001/0007	Gordon T. Black	Rates Collection proceedings action					
		ZZT001/0001	Test New CLient	test					
		TNT001/0001	Test new	fgggg					
		BLA001/0001	Gordon T. Black Dunnes Stores Blackrock	RTA Walkinstown Crossroads, G. Black Slip & Fall on Frozen Food Aisle					
\sim		BOIBUS/0001	Bing Oil Industries Business Banking	Advice re Shareholding Agreement - Web Designers Ltd					
Tasks		BOIBUS/00	David Bloggs	Stephen Keogh -v- Joe Bloggs					

Chapter 2: Search & Open

The Search Screen

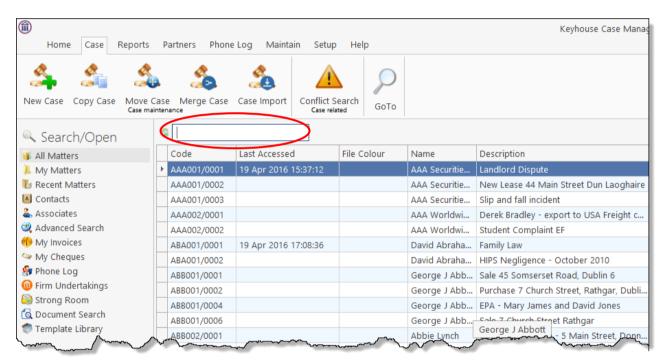
Home Case Reports		arch Tool	bar		Keyhouse Case Manage	rment (CN -	- Carol Nolan - 06:17 / 0	1:13)					Quick Sear	ch (Ctrl + Q) –
New Case Copy Case Move Case maintenance Search/Open All Matters My Matters		Conflict Search GoTi		arch b		Fee Code	Fee Earher		Column I	Headin	ıgs		Work Type	Open Cases Max results: 500 Original Closed Date
Recent Matters	 BRE001/0001 	13 Aug 2015 11:31:44	Pile Colour	Mike Breeze	Broken left leg.	MW		BREGUIJOU			012013	LINGBOOT	Accident	Original Closed Date
Contacts		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 F	eb 2008	Debt	Debt Collection	
Advanced Search			_	Jack Flynn	Sale of House at: 4 The Mews, Rathfarnh	CN	Carol Nolan	FLY001		02 J	ul 2015	Conveyancing	Sale	
My Invoices	Na	vigation	Bar	Gordon T. Bla	RTA Walkinstown Crossroads, G. Black	BS	Brian Sween	1234T		08 N	Aay 2010	Litigation	Road Traffic	
My Cheques				Jack Flynn	Document matter	SK	Stephen Ke							
Phone Log	FU			Jack Flynn	Purchase of 16 The Haywain, Terenure,	CN	Carol Nolan	FLY002/001					• • •	
Firm Undertakings	IBS001/0020	10 Aug 2015 11:43:26		Interim Rusine	Gary Neville - Short term loan	BS	Brian Sween				11/12	tter L	ICT	

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 number is 500.

Search Lists

Search All Matters List

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



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

							Keyhouse Case Manag	ement (CN - C
Home Case Reports	P	hone Log Ma	intain Setup Help					
🐴 🐴 🔮		\$						
New Case Copy Case Move Case maintenanc		e Merge Case	Conflict Search Case related Go	оТо)			
🔍 Search/Open	Ć	sale			1			
🙀 All Matters		Code	Last Accessed	•	File Colour	Name	Description	Fee Earner
My Matters	►	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	Ļ	WEI001/0001	\sim	~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	James Weis	Sale 22 Nutley Lane Donnybrook Dublin 4	Carol Nolan

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

Search Recent Matters

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

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

						Keyhouse Case Manag	ement (CN - C
Home Case Reports	F	hone Log Mai	ntain Setup Help				
New Case Copy Case Move Case maintenance		e Merge Case	Conflict Search Case related GoTo				
Search/Open	S.	sale	8				
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
Le 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.
- 3. Click on **Standard view tool** located on the following list of views will appear.
 - Click on Closed Cases to search only closed cases
 - Click on Open Cases to search only open cases.
 - Click on Open and Closed to search both lists.
 - Click on Standard View to return to the default view.
- 4. Input a key search word in the Search Box: the search criteria will be applied as you type.
- 5. **Double click** the required matter to open the closed case diary for this matter.
 - Note no amendments can be made in the case diary until the case is re-opened. See the Chapter 16 for further details.

		Open Cases 📃
	View	\sim
Open Cases		
Closed Cases		
Open and Closed Cases		

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.

Home Case Reports	5 Phone Log Ma	intain Setup Help			, í	-		Carol Nolan - 00:00 / 0						
v Case Copy Case Move Case maintenant	Case Merge Case	Conflict Search Case related GoTo												
Search/Open	My Contact													
Matters y Matters	Search													
ecent Matters	Client Code	Name	Address				Telephone		Email				Fe	
ontacts	AAA001		Dun Laognaire											
ssociates dvanced Search	AAA002	AAA Worldwide Remo	South Mall Cork				021 1241241		mareynold	s@AAAworld\	wideremovals.ie		SK	
ly Invoices ly Cheques	ABA001	David Abrahams	123 Mayfair Street Dublin 2				01-2902222		d.abraham	s@gmail.com			AM	
one Log m Undertakings	ABB001	George J Abbott	Ranelagh,				01-5656712		gabbott@i	ol.ie			BS	
rong Room	ABB002	Abbie Lynch	14 The Mews Dublin 12				01 456789		a.lynch@hc	tmail.com			SK	
ocument Search mplate Library	ACC001	Accord Music World Ltd	56 Second Street Bray				01 200000						MW	
	AIG001	Allied Investment Group	1 High Street, Dublin				1234567890		info@aigle	gal.ie			BS	
	AIN001	Allied Investment Netw	44 Main Street Donnybrook				6677889		andrew@ai	in.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					
show the second	AAA00 0003-	mar	clin and fr	Volan		Anaral	2015	A1400	AAA 9		-	· · ·	-	

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	accord											
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:
hanned for the	

"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.

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.

earch: Ellis%Rathmines	>					
In fields: 🗹 Client Name	e 🗹 Case Description 🗹 Client A	ddress 🗹 Code 🗹 Old	Ref 🗹 File Ref			
And Y Client Name:						
And Y Matter Desc.:						
And Y Client Address:						
And Y Matter Code:	And Y Old Ref:					
And Y Fee Earner:	✓ And ✓ Dept:					
Time Code 🔍	Name	File Colour	Client Address	Description	F/e	Team
BL 4001 (0001 C-	rdon T. Black	23 El	is Park Rathmines Dublin 6	RTA Walkinstown Crossroads, G. Black	BS	COM
BLA001/0001 Go		00.5		2 Trinity Close, Rathgar, Dublin 6	BS	COM
	rdon T. Black	23 EI	is Park Rathmines Dublin 6	2 millity close, Ratilgar, Dublin o	05	00111
BLA001/0002 Go	rdon T. Black rdon T. Black		is Park Rathmines Dublin 6 is Park Rathmines Dublin 6	Purchase of 8 Clonattin Hills, Wicklow.	SK	COM

My Matters

- 1. This will only allow you to see your matters. It will display them with the most resent at the top.
- 2. By using the drop down arrow beside the Handler's name, it is possible to view the matters of other individuals.

Home Case Reports	s Phone Log Mai	intain Setup Help			Keyhouse Case Manag	gement (CN -	Carol Nolan - 00:00 /	00:00)			Quick Search (Ctrl + Q)
A Copy Case Move	Case Merge Case	Case Import	iearch GoTo								
Search/Open	Handler Car	ol Nolan	>								
All Matters	5										My Open View
My Matters	Code	Last Accessed	Name	Phone No.	Description	Fee Earner ⁹	Started	Department	Work Type	Original Closed Date	
Recent Matters Contacts	AAA001/0003	04 May 2016 10:08:55	AAA Securitie	012112112	Slip and fall incident	Carol Nolan	16 Feb 2015	General	General	-	
Associates	BEC001/0002		Angela Beck	01-2339999	23 Hill Street, Bray, Co Wicklow	Carol Nolan	01 Feb 2007	Commercial	Advice		
Advanced Search	BEC001/0003	27 Apr 2016 15:35:54	Angela Beck	01-2339999	Sale of 3 Main Street, Bray.	Carol Nolan	02 Jun 2007	Conveyancing	Sale		
My Invoices	BLO001/0005		Joe Bloggs	01-6767981	Advice File	Carol Nolan	10 Sep 2005	Litigation	Advice		
My Cheques	BLO002/0003		David Bloggs	021-4577777	Sale 45 Hills Road, Tipperary	Carol Nolan	02 Oct 2010	Conveyancing	Sale		
Phone Log	BOU001/0001		Claire Bourke	01 2040020	Personal Injury at work	Carol Nolan	14 Jan 2011	Litigation	Advice		
Firm Undertakings	CUL001/0001		Ann Marie Cul		Credit Card Debit	Carol Nolan	14 Jan 2011	Debt	Debt Collection		
Strong Room	DEA001/0003		James Deane	01 6777777	Purchase 3 Burlington Terrace, Bray	Carol Nolan	03 Apr 2005	Conveyancing	Purchase		
Document Search	DUG001/0002		Paul Duggan	064 78901	Separation Arrangement	Carol Nolan	20 Aug 2010	Family Law	Separation A		
Template Library	FLY001/0001		Jack Flynn	01-564 7894	Road Traffic Accident at Junction 9 on M	Carol Nolan	08 Mar 2016	Litigation	Accident		
	HAR001/0001	27 Apr 2016 15:36:03	Brenda Hartley	01-290 2222	Sale of 1 High Street, Lucan, Co Dublin	Carol Nolan	27 Apr 2016	Conveyancing	Sale		

Manipulating the Search Screen

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

How to Sort Column Headings

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

'n٥	use				Chapter 2: S	Search &	Open
	Code	Last Accessed	File Colour	Name	Description	Fee Co	Fee Earner
•	SIM001/0001	21 Jul 2015 09:53:45		Bart Simpson	Sale of House at: 4 The Mews, Rathfarnh	CN	Carol Nolan
	FLY001/0001	21 Jul 2015 08:45:22		Jack Flynn	Sale of House at: 4 The Mews, Rathfarn	CN	Carol Nolan
	KEO003/0003	06 Jul 2015 09:19:51		Sam Keogh	EPA to Stephen Keogh	CN	Carol Nolan
	FLY001/0002	03 Jul 2015 11:35:31		Jack Flynn	Purchase of 16 The Haywain, Terenure,	CN	Carol Nolan
	BLO001/0005	03 Jul 2015 10:58:17		Joe Bloggs	Advice File	CN	Carol Nolan
	BOU001/0001	03 Jul 2015 10:28:10	-	Claire Bourke	Personal Joint work	CN	Car <u>ol No</u> lan

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

2↓	Sort Ascending
Z↓	Sort Descending
ż¥	Clear Sorting
2	Group By This Column
	Show Group Panel
ē	Show Column Chooser
₽	Best Fit
	Best Fit (all columns)
Ŷ	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.

Home Case Repor	ts Phone Log Mai	ntain Setup Hel	lp		Keyhouse Case Manag	jeme	ent (CN -	Carol Nolan - 00:00 /	00:00)	
	ye Case Merge Case maintenance		flict Search ase related GoTo							
🔍 Search/Open	8									
All Matters	Code	Last Accessed	Name	Phone No.	Description	Fee	Earner	Started	Department	Work Type
My Matters	► ZZZZZZ/ZZZZ		Non Assigned		Phone Message	1		Clear Filter (/	All Handlers)	
& Recent Matters	BEC001/0001		Angela Beck	01-2339999	Sale of 56 Church Street, Rathgar	1.				wn Wo
Contacts	MOO001/0001		Mrs M D Mo	01372 210242	Sale of : 73 Broadhurst Ashtead Surrey K	5	Search			wn Wo
🛦 Associates	ABB001/0001		George J Abb	01-5656712	Sale 45 Somserset Road, Dublin 6	H	Code	Name		wn Wo
🎗 Advanced Search	ONE001/0003		O'Neil Flynn	01-6766555	Una Murray of 78 Dodder Park, Churcht		couc	All hand	lors	aking
👂 My Invoices	ONE001/0001		O'Neil Flynn	01-6766555	56 Glengara Park, Dundrum, Dublin 14	H	ADM	Admin	lers	aking
Wy Cheques	EVA001/0001		Evans & Co.	01-4566777	78 Hillcourt Park, Dun Laoghaire, County		AM	Anne Me	allon	aking
Phone Log	TAR001/0002		George Tarrant	2455555	Separation		BS	Brian Sw		ition A
Firm Undertakings	DUG001/0002		Paul Duggan	064 78901	Separation Arrangement		CN	Carol No		ition A
Strong Room Document Search	WEI001/0001		James Weis	01-6777777	Sale 22 Nutley Lane Donnybrook Dublin 4		JP	Justin Ph		
Template Library	WAL001/0001		Margaret Wal	66556565656	Sale 4 Main Street, Cork		MK	Mark Ke		
prempiace cibrary	RYA021/0002		John Ryan	89999999	Sale - 55 Main Street, Bray		MW	Martina	· · · · · · · · · · · · · · · · · · ·	
	RYA002/0002		Margaret Ryan	0404 78920	Sale of no. 2 Main St Bray		SK	Stephen		
	REG001/0003		Andrew Regis	01 4355666	Sale 19 Green Court, Bray, Co. Wicklow		un Pheian		conveyancing	sale

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

Document Search

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

How to open the Document Search

- 1. Click on Search/Open, then on Document Search
- 2. Input the search keywords on the Document Search screen.
- 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.
 - Select a matter or leave blank to search against all matters.
- 5. To refine the search use the Advanced Option
- 6. Click **Search**. A list of documents that match the criteria will be displayed

	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
	Search X Clear Advanced 📎

Search:	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	
Document:	Search	
Track Reference:	Search	
Class:	~	
Type:	~	
Date:		
Created:		
Modified:	100	
Accessed:		
Old Ref:		
Your Ref:		
File Ref:		
:		
:		
From address:		
To address:		
	🔎 Search 🔀 Clear Simple	

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.



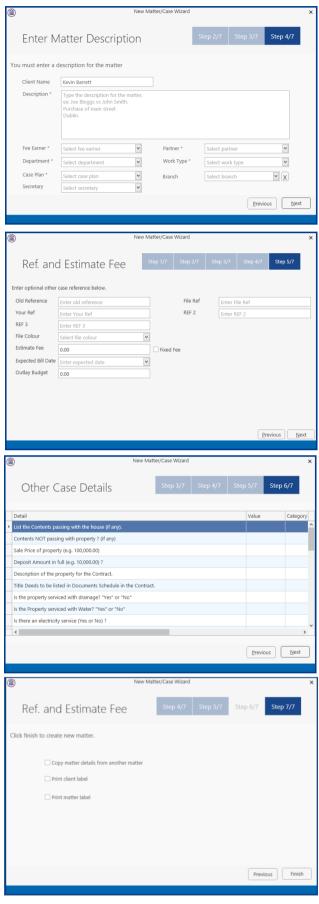
- 2. The *New Matter/Case Wizard* will open. The first screen contains a welcome message. Click Next.
- 3. The default option is to set up a new case for an existing client or contact.
- 4. Input all or part of the client's name or code in the search box. The search results will update as you type.
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

Now		isting Clie	nt	Step 1/7 Ste	p 2/7		Step 4/7	
INCOV	OLEX	isting Cile	TIU					
		escribes the actior	you wish to t	take				
Select an	existing clie	nt for an matter						
	ode AA001	Name AAA Securities Lto		Address 44 Main Street				
				South Mall				1
	AA002 BA001	AAA Worldwide F David Abrahams	emovais	123 Mayfair Street				
-	BB001	George J Abbott		60 Somerset Road,				
		Abbie Lynch		14 The Mews				
~	BB002	ADDETVICI					>	1
Client is	mot listed at	ove. Create new clier	at fac this name	attar				
O Client Is	not listed at	love. Create new ciler	it for this new fr	latter		Prev	ious <u>N</u> e	
						Elev		
			New Met	tter/Case Wizard				
			INEW IVIAU	tter/case wizard				
New	or Ex	isting Clie	nt	Step 1/7 Ste	p 2/7		Step 4/7	
lect the on			wou wish to t	ake				
	tion that d							
Select an	tion that d		r you wish to t	ano				
Select an		nt for an matter	ryou wish to t					
			©					1
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ke	existing clie	nt for an matter						4
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ke C • K	existing clie	nt for an matter		Address Main Street				
ke C • K	existing clie ogh iode EC003	nt for an matter Name Sam Keogh		Address Main Street				n,
ke C • K	existing clie ogh iode EC003	nt for an matter Name Sam Keogh		Address Main Street				
ke C • K	existing clie ogh code EO003 ZKE01	nt for an matter Name Sam Keogh		Address Main Street				
ke C Z Z	existing clie	Name Sam Keogh Stephen Keogh	8	Address Main Street 1 Main Street			>	
ke C Z Z	existing clie	nt for an matter Name Sam Keogh	8	Address Main Street 1 Main Street				
ke C Z Z	existing clie	Name Sam Keogh Stephen Keogh	8	Address Main Street 1 Main Street		Prev		xt
ke C Z Z	existing clie	Name Sam Keogh Stephen Keogh	© nt for this new m	Address Main Street 1 Main Street		Prev		xt
ke C Z Z	existing clie	Name Sam Keogh Stephen Keogh	© nt for this new m	Address Main Street 1 Main Street		Prev		xt
Client is	existing clie	Name Sam Keogh Stephen Keogh	© nt for this new m	Address Main Street 1 Main Street		Prev		xt
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Client is	existing clie oogh oode E0003 ZKE01	Name Sam Keogh Stephen Keogh	© nt for this new m	Address Main Street 1 Main Street natter	р 2/7		ious <u>N</u> e:	× ×
Client is	existing clie oogh code E0003 ZKE01 I Inot listed at er Cliel	nt for an matter Name Sam Keogh Stephen Keogh ove. Create new clies nt Details	© nt for this new m	Address Main Street 1 Main Street natter	p 2/7		ious <u>N</u> e:	, v
Client is Ente	existing clie ogh code EC0003 ZXE01 I Inot listed at Pr Cliel the new cli	nt for an matter Name Sam Keogh Stephen Keogh ove. Create new clies nt Details ents details below	© nt for this new m	Address Main Street 1 Main Street natter	p 2/7		ious <u>N</u> e:	, v
Client is Client cc	existing clie ogh code EC0003 ZXE01 Inot listed at er Cliel the new cl bde * BA	nt for an matter Name Sam Keogh Stephen Keogh ove. Create new clies nt Details ents details below	© nt for this new m	Address Main Street 1 Main Street natter	p 2/7		ious <u>N</u> e:	xt
Client is Ente	existing clie ogh code EC0003 ZXE01 Inot listed at er Cliel the new cl bde * BA	nt for an matter Name Sam Keogh Stephen Keogh ove. Create new clies nt Details ents details below	© nt for this new m	Address Main Street 1 Main Street natter	p 2/7		ious <u>N</u> e:	xt
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Client is Client as Client no Salutatio	existing clied oggit dode EC003 ZXEG0 not listed at the new cl the	nt for an matter Name Sam Keogh Stephen Keogh ove. Create new clief nt Details ents details below er client name er salutation	© nt for this new m	Address Main Street 1 Main Street 1 Main Street tter/Case Wizard Step 1/7 Ste		Step 3/7	ious <u>N</u> e:	xt
Client is Client as Client no Salutatio	existing clied oggit dode EC003 ZXEG0 not listed at the new cl the	nt for an matter Name Sam Keogh Stephen Keogh ove. Create new clief nt Details ents details below er client name er salutation	© nt for this new m	Address Main Street 1 Main Street 1 Main Street tter/Case Wizard Step 1/7 Ste		Step 3/7	ious <u>N</u> e:	xt
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Clert control of the second se	existing clie ogh code EC0003 EC00	nt for an matter Name Sam Keogh Stephen Keogh ove. Create new clien nt Details ents details below er client name er salutation er client address er telephone	© nt for this new m	Address Main Street 1 Main Str	Enter PP	Step 3/7	ious <u>N</u> e:	xt
Client of Client is Client of Client is Client of Client	existing clie ogh code EC0033 EC003 EC0	nt for an matter Name Sam Keogh Stephen Keogh ove. Create new clier nt Details ents details below er client name er salutation er client address er telephone er mobile number	New Ma	Address Main Street 1 Main Str	Enter PP Enter faa	Step 3/7 ²⁵ number x number nail ID	Step 4/7	xt
Clert control of the second se	existing clie ogh code EC0033 EC003 EC0	nt for an matter Name Sam Keogh Stephen Keogh ove. Create new clien nt Details ents details below er client name er salutation er client address er telephone	© nt for this new m	Address Main Street 1 Main Str	Enter PP Enter faa	Step 3/7 ²⁵ number x number nail ID	Step 4/7	xt

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



- 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.
- 2. Click **Next** to continue to Step 2.
- 3. Select a source matter by clicking the browse button.
 - $\overset{\text{W}}{\overset{\text{W}}}$ 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.
- 9. Click Next to continue to Step 4.

٢	Copy Case/Matter Wizard	×
	Copy Case/Matter Wizard Step 1/6 Step 2/6 Step 3/6	
	Matter/Case	
	Copy case details based on previous matter copied	
	Matter code ABA001/0001	
	Destination Case	
	Select a destination matter code where the selected codes has to be copied	
	Matter code Please select matter code . New Case	
	Previous Next	

8		A	dvanced Matter Search	
earch:				🕨 Go 🏋 Reset
Code	Name	File Colour	Client Address	Description
AAA001/0004	AAA Securities Ltd		44 Main Street Dun Laoghaire Co Dublin	Sale of 2 High Street, London
A88001/0007	George J Abbott		60 Somerset Road, Ranelagh, Dublin 6.	Sale of 1 Main Street, Howth, Co. Dubli
CUL001/0001	Ann Marie Cullen		101 Dun Emer Drive Dundrum Dublin 14	Credit Card Debit
DUN001/0001	John Dunne		44 Ellis Drive Rathmines Dublin 8	Sale of Village Hall
A88002/0001	Abbey & Procter		14 The Mews Dublin 12	Commercial
FIT002/0001	Melinda FitzGerald		12 Eaton Brae Orwell Road Rathgar Dublin 14	Sale of lands in wicklow
BLA001/0001	Gordon T. Black		23 Ellis Park, Rathmines, Dublin 6.	RTA Walkinstown Crossroads, G. Black
BLA001/0000	Gordon T. Black		23 Ellis Park, Rathmines, Dublin 6.	0000 Matter
AAA001/0003	AAA Securities Ltd		44 Main Street Dun Laoghaire Co Dublin	Sale of 1 Main Street, Laragh, Co. Wick
F25001/0001	Melinda Fisher		12 Eaton Brae Orwell Road Rathgar Dublin 6	Sale of Lands in Wicklow
DEA001/0000	James Deane		9 Northbrook Park, Ranelagh, Dublin 6.	0000 Matter
CLI001/0001	Bill Clinton		Main Street Bray Co Wicklow	Unfair dismissal by State Department
KEL002/0002	Sarah Kelly		IMI sandyford Dundrum Dublin 14	Debt Collection
A88001/0001	George J Abbott		60 Somerset Road, Ranelagh, Dublin 6.	Sale 45 Somserset Road, Dublin 6
ABA001/0001	David Abrahams		123 Mayfair Street Dublin 2	Family Law

۱		Copy Case/M	atter Wizard	×
(Copy Case/N	latter Wizard	Step 1/6	Step 2/6 Step 3/6
м	atter/Case Copy case det	ails based on previous matte	er copied	
	Matter code	CUL001/0001		
De	estination Case Select a destir	ation matter code where the	e selected codes has to	be copyied
	Matter code	Please select matter code		
				Previous Next

)	Copy Ca	_{copy case/Mat}	Step 1/6 Step 2/6 Step 3/6	×
		1.5	Drag a column header here to	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		
	2		Which County ?	County Dublin	
			Date of Contract	N/A	
	1		Loan Account Number ?	1258745 AE	
			Balance of Sale Price ?	587,000	
I			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	
				Previous Net	xt

Chapter 3: Creating New Clients and Cases

- 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 of the fields, Case Associates and actions which were copied, will be saved so that they will be selected by default the next time this source matter is copies.

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

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

		Сору	Case/Ma	itter Wizard	Step 2/6 Step 3/6 Step 4/6						
		Туре	Name/Com	Address	Phone	Solicito	Email	CaseC	Mobile		
I	V	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			
	V	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			

	сору са	se/Matte	er Wizard Step 3/6 Step 4/6 St	Step 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
	04 Oct 2011	G02	Letter to Client	78
	07 Jul 2011	505	Do Contracts, Requisitions & Family Home Dec.	1177
	30 Mar 2010	521	Ltr - Client re Statement of Account.	455
	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
E 🖌	14 Feb 2010	507	Handle Pre-contract enquiries.	451
	14 Feb 2010	505	Do Contracts, Requisitions & Family Home Dec.	450
	3 13 Jan 2010	501	Initial Sale Letter & Instructions to Client	449

Copy Case/Matter	r Wizard	Step 4/6	Step 5/6	
Completing Copy Case/M You have successfully (latter Wizard Completed Copy Case/Matte	r Wizard		
$\ensuremath{\overline{\ensuremath{\mathcal{S}}}}$ Save selection for th	ne next copy of this case plan	1		
Case Fields Copied Case Associate Copied Case Diary Copied	5 3 4			
			Previo	ous Finish

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.

			Keyhouse Case	Management (CN - Carol Nolan - 00.00 / 00.00)		Quick Search (Ctrl + Q) – 🗖 🗙
Home Case Reports	Partners Phone Log Maintain S	etup Help				
🌲 🝰 🔮	s 🎄 🎄 .	<u>A</u> 5)			
		flict Search GoT	То			
Client/Case	Case: ABA001/0001	David Abrał				Tel: 01-2902222 F/e: BS
Case Diary		Family Law				
Document Manager	Search				Standard View	Preview *
Scurrent Client Details Current Case Details	C A P D A Date	Time	Handler Synopsis		Action Co F	Letter to Solicitor re Pleading 🧼 🛶
Extra Case Details	9 🗰 🕴 🕴 04 May 2016		CN Letter to Solicitor re Pleading		G03 🕞	Preview Document
Associates	💕 🔮 🏌 27 Jun 2014	11:19	MW Undertaking changed by BRIANS		ADMUD 🖗	
Critical Information	S 19 Jun 2014	11:41	BS Invoice No:230		D801 P	? ABA001/0001/BS/GCU
🛓 Know Your Client	🔮 📒 🕴 19 May 2014	16:32	BS Letter from Accountant		G26 🕞	
P Linked Cases	S 01 May 2014	23:54	BS Invoice No:229		D801 P	04 May 2016
📓 A/c Ledger	🍯 🚔 🕴 01 May 2014	22:29	BS Email From:keyhousedemo@gmail.com - Mo	bile Call to Brian Sweeney	EMI 🖗	
Time Ledger	🍯 🔗 🕴 01 May 2014	12:30	BS Email From:brian@keyhouse.ie - Practice Ma	nagement Review Agenda	EMI P	DX 891 Dublin 2
Debt Ledger	🍯 🔗 🕴 01 May 2014	00:00	BS Email To: - Financial Trends for the Economy		EMI P	Allsop & BrownePRIVATE
Reserve Ledger Undertakings	🍯 📞 27 Feb 2014	09:01	BS David Abrahams		рне 🏳	Solicitors
- Onder takings	🍯 🛸 🕴 27 Feb 2014	07:08	BS Email To:brian@keyhousedemo.ie - Sample F	Report for Key Performance Indicators	EMI 🏳	2 Baggott Street Dublin 2
Strong Room	🥑 🕴 16 Jul 2013	15:54	BS Letter to Solicitor re title Letter to Allsop & B	rowne	G03 P	Dubin 2.
	S 🚇 🕴 09 May 2013	08:47	BS Accountants Letter		G13 🏳	
	🍯 📞 17 Apr 2013	11:24	BS Brian		P	
	🍯 🤌 🕴 17 Apr 2013	10:27	BS Email To: - Copy Land Folio		EMI P	
	S 21 Mar 2013	08:43	BS David	Case Diary showing	рно 🏳	Re: Our Client: David Abrahams You Paul Smith
	🔮 🚇 🕴 12 Feb 2013		BS Innovation Ad		G13 🖗	You Paul Smith
	I 8 Dec 2012	18:08	BS Letter to Solicitor re Financial Statement Le	 Task completed 	G03 🏳	
	🍯 🊔 🕴 16 Nov 2012		BS Email From: "Martina Winters" <martina@ke< td=""><td>I) Tusk completed</td><td>EMI 🖗</td><td>🖻 Document</td></martina@ke<>	I) Tusk completed	EMI 🖗	🖻 Document
	S # 15 Nov 2012	14:57	BS Letter to Solicitor re Proceedings Letter to	2) Future Tasks	G03 P	Document
	🍯 🚔 🕴 15 Nov 2012	09:53	BS Email To: - Draft Reseller Agreement		EMI 🖗	Preview
	S 15 Nov 2012	09:03	BS Phone Call - Advised Client on Court process		PHE P	TIEVIEW
	Ø 05 Oct 2012 Ø	11:36	BS Letter to Solicitor re title Letter to Peter D. Jo	nes & Co.		OUL'S Industry
	R. 8 26.04.2011	15:05	BC David Abanda		Documents	Our 9 Hannetary
	Attachments Search				Documents	
	Type Document			Version Date Document Classical	Generated	
Tasks	Letter to Solicitor re Please	ading		1 04 May 2016 Letter	Generateu	
Search/Open						/
Client/Case						~
Time Costing						× < >
						CN: Carol Nolan Wednesday, 04 May 2016 14:59 al

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.

ient/Case e Diary	Case:	ABA	001/000			₹) .	. David Ab Family La						Tel: 01-290223 F/e: BS
ument Manager		s Se	arch							Standard \	/iew 🔲	Preview	
rent Client Details rent Case Details	Act	. A	P [) A.	Da	te	Time	Handler	Synopsis	Action Co	. F	Letter to Solicitor re Pleading	
a Case Details	3	ŧ.		1	04	May 2016	14:59	CN	Letter to Solicitor re Pleading	G03		Preview Document	
iates		# 0	1		27	Jun 2014	11:19	MW	Undertaking changed by BRIANS	ADMUD	P	10100100010	
al Information		2			19	Jun 2014	11:41	BS	Invoice No:230	D801	P	ABA001/0001/BS	S/GCU
Your Client Cases		5		1	19	May 2014	16:32	BS	Letter from Accountant	G26	P		
Cases	(2			01	May 2014	23:54	BS	Invoice No:229	D801	P	04 May 2016	
ger		5 6	3	P	01	May 2014	22:29	BS	Email From:keyhousedemo@gmail.com · Mobile Call to Brian Sweeney	EMI	P		
dger		5 6	2	1	01	May 2014	12:30	BS	Email Frombrian@keyhouse.ie - Practice Management Review Agenda	EMI	P	DX 891 Dublin 2	
dger Ledger		5 6		P	01	May 2014	00:00	BS	Email To: - Financial Trends for the Economy	EMI	P	Allsop & BrownePRIVATE	
Ledger kings		5 3			27	Feb 2014	09:01	BS	David Abrahams	PHE	P	Solicitors	
Bhilligs	(5 6		P	27	Feb 2014	07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for Key Performance Indicators	EMI	P	2 Baggott Street Dublin 2.	
Room		3		P	16	Jul 2013	15:54	BS	Letter to Solicitor re title Letter to Allsop & Browne	G03	9	Louin 2.	

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	ABAG	01/000	1		₹)	David Abr Family Lav						Tel: 01-29022 F/e: BS
Document Manager		😋 Se	arch							Standard V	iew 🗌	Preview	
Current Client Details Current Case Details	Acti	C A	P	D A	Di	ate	Time	Handler	Synopsis	Action Co	F	Letter to Solicitor re Pleading	-
Extra Case Details	8								Letter to Solicitor re Pleading			Preview Document	
Associates		# 0	1		27	7 Jun 2014	11:19	MW	Undertaking changed by BRIANS	ADMUD	P	10100100010	0.0011
Critical Information		•			19	Jun 2014	11:41	BS	Invoice No:230	D801	P	ABA001/0001/B	S/GCU
Know Your Client				1	19	May 2014	16:32	BS	Letter from Accountant	G26	P		
inked Cases					01	May 2014	23:54	BS	Invoice No:229	D801	P	04 May 2016	
Vc Ledger		S 🕈	2	1	01	May 2014	22:29	BS	Email From:keyhousedemo@gmail.com - Mobile Call to Brian Sweeney	EMI	9		
ime Ledger		S 6	3	1	01	May 2014	12:30	BS	Email From:brian@keyhouse.ie - Practice Management Review Agenda	EMI	P	DX 891 Dublin 2	
ebt Ledger		S 🕈	3	1	01	May 2014	00:00	BS	Email To: - Financial Trends for the Economy	EMI	9	Allsop & BrownePRIVATE	
Reserve Ledger Undertakings		S (27	7 Feb 2014	09:01	BS	David Abrahams	PHE	9	Solicitors	
ndertakings		S (2	1	27	7 Feb 2014	07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for Key Performance Indicators	EMI	P	2 Baggott Street Dublin 2.	
trong Room		•		1	16		15:54	BS	Letter to Solicitor re title Letter to Allsop & Browne	G03	P	Dubin 2.	

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		S	1	30 Nov 2015	16:37	CN	Letter to Client 1234	G02	P
Linked Cases		S		30 Nov 2015	14:22	CN	Test Doc	dsfd	P
		S		30 Nov 2015	14:21	CN	Letter to Bank re Redemption Value	dsfd	P
A/c Ledger Time Ledger		S		30 Nov 2015	14:20	CN	Contract of Sale	dsfd	P
Debt Ledger		S	- 8	30 Nov 2015	11:46	CN	Contract for Sale Draft 1	TDOC	P
Reserve Ledger		S		30 Nov 2015	11:46	CN	Contract for Sale Draft 2	G11	P
Undertakings		S O		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.

D						Keyhouse Case Management (CN - Cirol Nolin - 0001 / 0728)			Quick Search (Ctrl + Q) – 🗗
Home Case Repor	rts Pho	ie Log Ma	aintain Setup Help	, ,					
lew Item - Print - Capt			te Action Start Timer P Account						
Client/Case	Case:	BAR002/000	n ()			Kells, Co Meath			Tel: 01-569 1 F/e: CN
Document Manager	WAR	llNG : Money							Ignore Show n
Current Client Details		Search					Standard	View	Preview
Extra Case Details	Acti	č A P (D. A. Date	Time	Handler	Synopsis	Action Co		Letter to Client 1234 🥠
Critical Information	S		23 Dec 2015	12:22	CN	Letter to Client ?	G02	P^	Preview Document
Know Your Client		2	30 Nov 2015	16:37	CN	Letter to Client 1234	G02	1	BAR002/0001/CN/AM
Linked Cases		8	# 30 Nov 2015	14:22	CN	Test Doc	dsfd	9	
A/c Ledger		5	# 30 Nov 2015	14:21	CN	Letter to Bank re Redemption Value	dsfd	9	30 November 2015
Time Ledger		<u>.</u>	# 30 Nov 2015	14:20	CN	Contract of Sale	dsfd	9	So revenue sors
Debt Ledger		8	# 30 Nov 2015	11:46	CN	Contract for Sale Draft 1	TDOC	9	
Reserve Ledger		5	# 30 Nov 2015	11:46	CN	Contract for Sale Draft 2	G11	9	Kevin Barrett
Undertakings		S 🛈	23 Nov 2015	10:27	CN	Scanned Post/Mail	G22	P	1 High Street
		S 🗢	23 Nov 2015	10:27	CN	Email From: - Email	EMI	P	Kells Co Meath
Strong Room			23 Nov 2015	10:26	CN	Note to File	G199		

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	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					
WARNING: Only speak to John Dunne with calling this client.						

- **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			
Client Current	0.00		Next Action				
Client Deposit	0.00		Last Record Tin	ie	MW	01 Sep 2011	Client Meeting re issue with planning
Current Locked up value	7,491.38	Percentage of Estimated Fee		-			
Total Work In Progress	0.00						
Write off time	0.00						
Fees issued to date	6025.00						
Fees To Date + WIP	6,025.00						
Estimate Fees	0.00						
Draft Invoices	0.00						
Last Bill Date	01 Feb 2012				-0		
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	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~		~~~	- have	

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
₽ ₽	Tasks with a Broken Yellow Box denote documents processed
<	Tasks with a Green Tick denote a completed task
Ω	Tasks with a Fixed Date denotes a task that will be completed with the date of generation.
1	Tasks with a Red Dot denote a high priority task.
9	Tasks with S denote a Statute of Limitation date or a critical date action.
25	Tasks with a Calendar Symbol denote an appointment.
९,	Tasks with a Phone Symbol denote a phone call.
	Tasks with a yellow note denote a Note.
	Tasks with a hand denote a delegated task.
	Tasks with a blue arrow denote tasks of low importance.
	Tasks with U denote an Undertaking.
\geq	Tasks with an envelope denote an email sent or received.
0	Tasks with a document attached
0	Tasks with an M denote scanned post
C	Tasks with a C denote critical tasks
শ	Task with a building denote Court Dates
6	Task denotes Photo ID
٢	Task denotes Non Photo ID
	1

The Case Diary Toolbar

	NI -		🕸 Action
E	New	Click on the New to add any of these tasks.	🦲 Note
New Item -			🛸 Email
Charles Car			😰 Appointment
			📞 Phone Message
			Dictation
			🚞 Draft Invoice
			📼 Request Cheque
			🛕 Conflict Search
=	Printer	Click to print any of the following reports:	
Print 👻	Finter		Activity Report
			Case Summary Report
		-	Matter Label
		=	Client Label

G	Capture	Click on capture to launch the document capture program to import documents or folders of documents or images.
Generate	Generate	Click to generate a document for a selected action.
Complete Action	Complete Action	Click to mark a task as complete.
Start Timer	Start Timer	Click to start the timer for the current case.
o Post Time	Post time	Click to bring up a manual time slip.

Navigation within the Case Diary

Case: FIS001/0001 () Melinda Fisher Sale of Lands in Wicklow		Tel: 012902222 F/e: CN
Case: FIS001/0001	Case Code	Case Code of current open case. Or To open a case input the case code and press enter.
	Navigation buttons	Move to the previous Case or go to Next Case.
	Search Case List	Click to search for an existing Case. Double click the required case to open.
Quick Search (Ctrl + Q)	Quick Search	This button is available on all screens and will allow you to quickly find any case.

Case Diary Navigation Panel

💾 Case Diary	Case Diary	Case Diary Screen		
🖉 Document Manager	Document Manager	Click on this to launch the Document Manager		
🚴 Current Client Details	Current client Details	Click on this to view or edit the current client details.		
鰢 Current Case Details	Current Matter Details	Click on this to view or edit the current case/matter details.		
🎒 Extra Case Details	Extra Case Details	Click on this to view extra case details		
🙅 Associates	Associates	Click on this to view case associates i.e. professionals or parties connected to this case.		
 Critical Information 	Critical Information	Click on this to view critical information particular to this case.		
촼 Know Your Client	Know Your Client	Click on this view to see case specific information in a central location.		
P Linked Cases	Linked Cases	Click on this screen to see cases that are linked to this case.		
🞑 A/c Ledger	Accounts Ledger	Click on this to view the accounts ledger.		
翼 Time Ledger	Debt Ledger	Click on this to view the debt ledger.		
😰 Debt Ledger	Time Ledger	Click on this to view the time ledger.		
鼲 Reserve Ledger	Reserve Ledger	Click on this to view the reserve ledger.		
Undertakings	Undertakings	Click on this to view the undertakings on this case.		
Strong Room	Strong Room	Click on this to view items in your strong room.		

Amending Client and Case Details

Updating Client Details

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

2. Click on **Current Client Details**

& Current Client Details located on the

Navigation panel the following window will appear.

Input the following information as required:

General Input/Amend information on the client's name, address, telephone numbers etc. This screen also has an option to add a client "Warning Message" and "Disallow new Matters".

Code FLY001			Client Name	Jack Fly	m		
			Envelope Name	Enter e	nvelope name		
Corporate	Personal	Legal Details	Billing Detai	ls	Permission	Bank Details	
General	Client Contacts	Notes	Matters	Matters		Categories	
Salutation	Jack		Main Contac	t E	Enter main contact		
Address	10 Rose Lawn		Telephone	0	01-569 7412		
	Blanchardstown Dublin 17	Fax No	E	Enter fax number			
			Mobile	E	nter mobile number		
E-Mail	jack@gmail.com Enter other ref Carol Nolan Enter VAT number Enter postal code		Secondary E	-Mail ja	jack@hotmail.com		
Other ref			PPS no	E	nter PPS number		
Fee earner *			✓ Spouse PPS	E	mber		
Client VAT no			Tax type		elect tax type	~	
Postal code			tal code County Enter county				
DX Address Enter DX Address			Nationality		elect nationality	~	
			Warning Me	ssage			
					Disallow new matter	s	
Anti mon	ey laundering checked	Check if this c	ontact is an organ	isation	✓ Receive month	ly statements	

- Client Contacts Click on **Client Contacts** to add additional client contacts for example the client's spouse or if the client is a company add an employee's details.
- Notes Click on the **Notes Tab** to enter notes relating to the client.
- Matters Click on the **Matters tab** to view a list of all active matters assigned to this client. It will also give the option to set the matter as the Billing Matter for composite billing.
- Cross Reference Click on **Cross Ref tab** to cross reference the client with another for example a husband and wife.
- Categories Click on **Categories tab** to add the client to a category.
- CorporateClick on Corporate tab to add the company details e.g. Company Registration Number.PersonalClick on the Personal tab to add the client's personal details for e.g. Date of Birth, Date
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.

î					Current	Case Details				:
Client Code A Matter 0		Descript	tion * F	amily Law						
Matter Adn	nin Case As	isociate /	Archive	Billing [Details	Permission	Transaction	Linked Cases		
Fee Earner *	Brian	Brian Sweeney			▼ File	Ref	Enter File Ref			
Secretary Partner *	octationic contain		~		F 2 F 3	Enter User2				
Department		Family Law				ur Ref	Enter YourRef			
Work Type *	CType * Action		[~		Mark as Important			Statement	
Old Reference	Did Reference Enter old reference				Bra	Branch Select branch				×
Case Plan	& Status									
Case Plan/	Type * Gene	ral Office V	Vork		~	File Colour	Select file colo	ur	¥	Clear
Case Statu	Case Status Select case status			~	Record No	Enter record no				
File No 256									ОК	Cancel
File No 256									<u>Q</u> K	Cance

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

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

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

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

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

More Est Fees

Allows user to enter information about issued invoices and expected invoices into the future.

	Current Case Details
Client Code AAA001 Matter 0001	Estimated Fees X Add Edit Delete
Matter Admin C Value To Client En	Search Estimated Bill Date Estimated Fees Amt Image: Control of the search of the
Started Date 06 Statute Date Pile Deposit Name En Outlay Budget En Comments Enter comments	Add Matter Estimated Fees X Matter AAA001/0001 Estimated Date 31 May 2016 V
File No 180	↓ Show in Alert

Show In Alert
Effectively Complete

	Comments	Input any comments and click Show in Alert if it is to be mac visible for all users.					
	Effectively complete:	Tick if the case is effectively complete but should not be closed at this time.					
Case Associate	Click on the Case Asso	ciate tab to add, view, edit or delete Case Associates.					
	• • • • •	Input (if applicable) alternative client details such as client name, salutation, address and click on the Set Override button to apply it to future documents generated.					
Other Details		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 th	ese variables are indiv	idual to each case plan type and case.					
Archive	Remove the tick to rec	Remove the tick to reopen a previous archived file.					
Billing Details	Click on the Billing Details tab to add information on the billing of this matter.						
	For Debt cases input th total debt amount coll	ne charge arrangements, the debt amount collected, and the ected.					
		ons, select the billing type and default billing method. Use the on to set the charge rates.					
	Matter Charge Out Rat Earners who may work	te will all allow for different charging rates for different Fee on the Matter.					
Permissions	Click on the Permissio remove particular user	ns tab to control access to this matter, for example to add or groups.					
Transaction	Click on Defendan t or Client tab. Then click on the Post Button to add a transaction. Click on the Change Button to amend an existing transaction.						
🗏 Note th	e balance will automat						
Linked Cases	Click on the Linked C to link two or more c together.	Matter 0001					
Click OK when record.	complete, to update th	Started Date 20 May 2011 Exp. Bill Date [b] May 2016 Statute Date 11 May 2014 Image: Comparison of Comparison					

File No 256

Inserting a Statute of Limitations Date

- 1. **Open** a case in the **Case Diary**.
- 2. Click on Current Case Details located on the case Diary shortcut bar.
- 3. Click on the Admin Tab.
- 4. Input a Statute Date or click on the down arrow to select a date from the calendar.
- 5. Click OK to save the changes.
- 6. The **Statute Date** will now appear as a task in the Case Diary assigned to the case **Fee Earner** and dated **prior** to the actual Statute of Limitations Date for reminder purposes. The number of days warning is set system wide and can be set by a system Administrator. Please see the Admin Manual for details.

Cas	n AA	A001,	0001		()	AAA Secu	rities Ltd		Te	l: 01211211
						Landlord	Dispute		F/e	e MW
WA									Ignore	Show me
WA	RNIN	IG : No	activi	ity on	this file in over a	21 months.			Ignore	Show me
	8	Searc	h						Standard Vi	ew 🔲
Acti	C	A P	D	. A	Date	Time	Handler	Synopsis	Action Co	F
9	~	\$						AAA Securities Ltd		- ~ Main
	•		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. **See** the following example.

Cas	e: FL	Y001	/000	01		•••		ic Accident a	at Junction 9 on M50
	\$	Sea	rch						
Action	C	A	P	D	A	Date	Time	Handler	Synopsis
on		9	1			04 Jan 2018	09:58	CN	Statute of Limitations Date =04 Apr 2018
	~		1	•		25 May 2016	12:59	CN	Review File

Case Associates

What are Case Associates?

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

Adding a Case Associate

- 1. Go to **Search/Open** and select **Associates** from the Panel on the left.
- 2. Before creating a new associate check to see if it already set up. Click on **All** in the **Associate Type** then enter the name in the **Search Box** for Associate.

Home Case Report	s Partners Phone Log Maintain Set	tup Hel	lp	Keyhouse Ca	se Management (CN - Carol Nolan - 00:10 / 0720)			Quick Search (Ctr	1+Q) - 0 ×
Import Export Contact	Delete								
Search/Open	Associate Type	,	Associates						
🔰 All Matters	Search		Search	Include Retired					
My Matters Recent Matters	Associate Type		Code	Name/Company	Address	Phone No	Category	Notes	Туре
Contacts Associates	ALL	^	000001	Green Associates (Green Associates)	21 Main Street Bray Co. Wicklow	01 6666666			SURVEYOR
Rearch	Accountants		000002	George Gibbons	The Surgery 23 Heath Road Terenure Dublin 6	01 2345555			DOCTORS
My Invoices My Cheques	Actuary		000003	Dublin Circuit Court	Circuit Court Office, Aras Ui Dhalaigh, Inns Quay, Dublin 7.				CIRCOURTS
😔 My cheques	Agents								
Firm Undertakings	Architects		000004	Dublin District Court	Dolphin House, East Essex Street, Dublin 2.				DISCOURTS
Strong Room	Attorney		000005	Eagle Star (Eagle Star)	Blackrock Co. Dublin				CLIENTINSUR
Template Library	Auctioneers		000006	Dun Laoghaire Rathdown County Co	Civic Offices Dun Laoghaire Co. Dublin	205 88888			LOCALAUTHORI
	Banks								
	Barristers		800000	Sexton Keenan	Walkinstown Road, Walkinstown, Dublin12	4500833			OPPOSITION

- 3. If the Associate is not listed then click the Green Cross to add
- 4. Input the **relevant** information

First Name

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

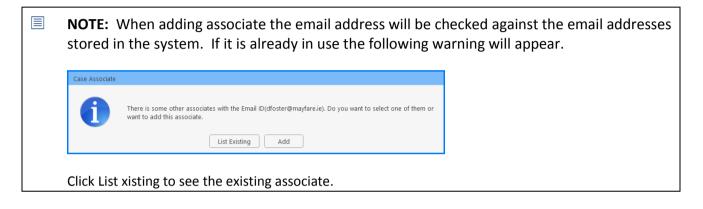
- Salutation: Input the Salutation
- **Company:** Input the company name
- Title: Input the title ie. Mr, Mrs etc.
- Address: Input the address
- **Code:** Input a Code for this contact e.g. JAC001 for Jackson. If you leave the code blank the system will assign a numeric code.
- Phone No: Input the main phone number
- Fax No: Input the fax number

Home: Input home phone number

Details												
Type *	Select a	Туре				~	Code *	Enter a code				
Full name *								Please enter phone number				
First name Surname Salutation Company								Please	enter fax number			
	Code	· · · · · · · · · · · · · · · · · · ·	Descripti			Home	Please enter home number					
		ACCOUNTANTS Accountants ACTUARY Actuary				^	Mobile no					
		AGENT Agents					E-Mail	Please enter E-Mail id				
	ARC	HITECT	Architects									
Title	ATTO	ORNEY	Attorney				DX ref		enter DX ref			
Address	AUC	TIONEERS	Auctione	ers			County	Please	enter county			
	BAN	KS	Banks				Postal Code	Please	enter postal code			
	BAR	RISTERS	Barristers					Reti	end			
	BBSS	C	BBSSC Co					reci	reu			
	RDM	REGISTRAR	Registrar									
Search										New	🧭 Edit	× Dele
Relationshi	p	Name		Phone	Email				Address			

Mobile:	Input mobile phone number
E-Mail:	Input e-mail address
DX Ref:	Input the Document Exchange reference if applicable
Nominated:	Tick is this is the nominated contact.
County:	Input the county.
Post Code:	Input the post code.
Retired :	Tick the box if a case associate is no longer required to prevent them from being selected.

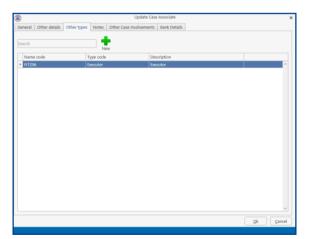
5. Click **OK.**



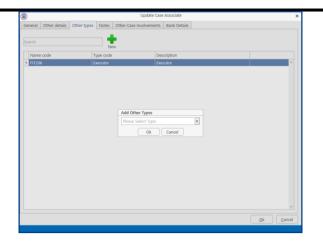
Adding an Associate to Other Types

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

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



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



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

•	JOA.	
	Add Other Types	
	BENEFICIARY	~
	ACCOUNTANTS	^
	ACTUARY	
	AGENT	
	ARCHITECT	
	ATTORNEY	
	AUCTIONEERS	
	BANKS	
	BARRISTERS	
	BBSSC	
	BDMREGISTRAR	
	BENEFICIARY	
	BORROWERS	
	BRANCH	_
	CHARITY	
	CHILDREN	
	CIRCOURTS	
	CLAIMHANDI FR	\sim

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

0		Update Cas	e Associate	
General Other details	Other types Note	es Other Case Involvements	Bank Details	
Search		New		
Name code	Туре со		scription	
FITZ06	Executo	ar Exe	cutor	^
FITZ06	BENEFI	CIARY		
				v

5. Click **OK**.

Maintaining unwanted Case Associates

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

Retire a Case Associate

1.	Open	the	Asso	ciate	to	be	retire	d.
----	------	-----	------	-------	----	----	--------	----

eneral Oth Details Type *	ner details	Other types		Other Case	Involvements	Bank Detai	le l				
			Notes	Other Case	involvements	Bank Detail	15				
Type *											
	Solicitors	;			\sim	Code *	BOLA	02			
Full name *	Boland 8	د Quirke				Phone no	021 277984 021 277943				
First name	Enter firs	t name				Fax no					
Surname	Enter sur	name				Home	Please enter home number Please enter mobile number Please enter E-Mail id				
Salutation	Sirs					Mobile no					
Company	Boland 8	د Quirke				E-Mail					
Title	Please er	nter title				DX ref	No DX				
Address	Solicitors					County	Please	e enter county			
	72 South Cork.	Mall				Postal Code	Please	e enter postal code			
	Cont.					Г	Reti	ired			
						L					
Search								🛉 💋 New Edi	t Delete		
Relationshi	ip	Name	Pho	ne	Email			Address			

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

Merge Case Associates

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

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

Home Case Reports	Partners Phone Log Maintain Setup	Hel	,	Keyhouse Ca	se Management (CN - Carol Nolan - 0010 / 0720)			Quick Search (C	trl + Q) - ■ ×
Import Export Contact	×								
Search/Open All Matters	Associate Type		Associates	Include Retired					-
My Matters Recent Matters	garda O		Code	Name/Company	Address	Phone No	Category	Notes	Туре
Contacts	• Garda	^	JO0001	Stillorgan Station (Stillorgan Garda S	2 Main Street, Stillorgan, Co. Dublin	2833445			GARDA
Advanced Search		,	S00001	Stepaside Garda Station (Rathmines	2 Main Street Stepaside Co Dublin	4987777			GARDA
 Wy involces My Cheques ∯ Phone Log G prim Undertakings Strong Room O comment Search 									
Template Library									

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

)		Select Merge Case	Associate			
Search						
Туре	Name/Company	Address	Phone	Email	Code	Retired
Garda	Rathmines Gard	1 Main Street Rathmines Dub			GAR004	N
Garda	Stillorgan Statio	2 Main Street, Stillorgan, Co	2833445		JO0001	N
					6	elect Canc

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



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

Delete a Case Associate

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

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

eneral Othe	r details	Other types	Notes	Other Case Involveme	Bank Details		
Search							
Case	Nar	ne			Description		
GRE001/000	1 Gre	en & Alridge			ohn Flint -v- Sam Hume		1
MUL001/00	1 Mu	lligan & Murray	7		arry Williams -v- Department of Health		
BLO001/000	8 Joe	Bloggs			emortgage - top up Ioan		
CLI001/0001	Bill	Clinton			Infair dismissal by State Department		
MER001/00	1 Me	rri Munchkins			urchase 12 Main Street Sligo		
MUR002/00	D1 Bob	Murphy			urchase of No. 1 The Square allaght		
SMY001/00	1 Lau	ra Smyth			aura Smyth v Joe Byrne		
TOB001/000	1 Avr	il Tobin			ale of The Cottage, Ashbourne, Co Meath		
WEI001/000	2 Jam	ies Weis			urchase Penthouse Suite Morehampton Court	Dublin 4	

- 2. A list of all matters associated with the **Associate** will be listed.
- 3. Move **each** matter to an alternative Associate.
- 4. Once all have been moved, right click on the associate and select **Delete**.

How to add an existing case associate to a case

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

Home Case Reports	Phone Log Ma	intain Setup Help	Keyhouse Case Man	agement (CN - Carol No	olan - 00:05 / 00:00)				4	□
dd Professional Associates										
Client/Case	Case: A8A001/000	11 Abrahams								Tel: 01-29
Case Diary		Family Law								F/e: AM
Document Manager	Search									Standard View
Current Client Details Current Case Details	Type	Name/Company	Address	Phone	Solicitors Ref	Email	Case Code	Mobile	Assigned Contact Name	Assigned Contact Ph.N
Other Case Details	 Barristers 		The Law Library, Dublin 8.	01-8788888		f.edwards@lawlibra	ABA001/0001	087-7666666		
Associates	Other Party	and south stand souths	33 Green Park Dundrum	016755555		psmith@gmail.com	ABA001/0001			
Know Your Client	Solicitors	Allsop & Browne (Allsop & Bro	2 Baggott Street Dublin 2.	01 6655777		info@allsopbrowne	ABA001/0001			
itrong Room										
	Contact Details	5			Main Contacts	Details (if applicable)				
		is Frank Edwards			Main Contacts	Details (if applicable)				
	Name				Name	Details (if applicable)				
	Name F Company F	Frank Edwards			Name Address	Details (if applicable)				
Tarks	Name F Company F Address C	Frank Edwards Frank Edwards 8L The Law Library, Dublin 8.			Name Address Phone	Details (if applicable)				
Tasks Search/Open	Name F Company F Address C	Frank Edwards Frank Edwards BL The Law Library, Dublin 8. 01-8788888			Name Address Phone Mobile	Details (if applicable)				
	Name F Company F Address C Phone C Mobile C	Frank Edwards Frank Edwards 8L The Law Library, Dublin 8.			Name Address Phone	Details (if applicable)				

- 2. Click on **Associates** on the **Navigation** panel: a list of case associates assigned to case will appear.
- 3. Click on **Add Professional** located on the **Home** tab of the Ribbon while you are viewing Case Associates. The following dialogue box will appear, listing categories on the left of the screen and entries on the right.

		Add	Case Associate Professional				ರ್
Action							
Active Contact Associate Print							
ssociate Type	Associates						
Search	Search						Standard View
Associate Type	Code	Name/Company	Address	Phone No	Category	Туре	Notes
ALL	000001	Green Associates (Green Associates)	21 Main Street Bray Co. Wicklow	01 6666666		Surveyor	
Accountants	000002	George Gibbons	The Surgery 23 Heath Road Terenure Dublin 6	01 2345555		Doctors	
Agents	000003	Dublin	Circuit Court Office, Aras Ui Dhalaigh, Inns Quay, Dublin 7.			CirCourts	
Architects							
Attorney	000004	Dublin	Dolphin House, East Essex Street, Dublin 2.			DisCourts	
Auctioneers	000005	Eagle Star (Eagle Star)	Blackrock Co. Dublin			ClientInsur	
Banks	000005	Dun Laoghaire Rathdown County Cou	Civic Offices Dun Laophaire Co. Dublin	205 88888		LocalAuthori	
Barristers							
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							
ACCBank Branch	904236	Kilkenny (Bank of Ireland)	5 Main Street Kilkenny Co. Kilkenny	042 677777		Lendinst	
	904354	Sutton (Bank of Ireland)	23 High Street Sutton Co. Dublin	4566677		Lendinst	

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

Ì						Add Case As	sociate Professional					
Action												
Contact	Add Edit D	elete	Print Print									
Associate Ty	pe			A	ssociate	25						
sol			e	S	Bearch]				Standard Vi	ew
Associate Type	2				Code	Name/Company	Address	Phone No	Category	Туре	Notes	
Solicitors	-		^		800000	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		
			~			a. a.t. /a						
									Ac	۸ ا bi	Add and Close C	lose

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

Screen.

How to add a New Case Associate to a Case

- 1. Open a case in the Case Diary.
- 2. Click on Associates on the Navigation panel
- 3. Click on **Add Professional** and the Home tab of the Ribbon.
- 4. Check the **Category** of case is correct e.g. Bank.
- 5. Alternatively, click in the **search box** and **input** a key search word the search criteria will be applied as you type.
- 6. If no record is found then add a new record.
- 7. Then click on the **green plus** and the following screen will appear.

						Add Case A	ssociate Professional
Action							
- ♦	+,	/ X	2	嵩			
Import Export	Add 8	Edit Delete		Print			
			Labels				
Contact	Ass	sociate	Prin	t			
Associate T	ype			As	sociate	s	
Search				Sea	arch		
Associate Ty	pe			C	ode	Name/Company	Address
▶ ALL			^	0	00001	Green Associates (21 Main Street Bray Co. Wickl
Accountants				0	00002	George Gibbons	The Surgery 23 Heath Road T
Agents					00003	Dublin	Circuit Court Office Area Ui D
Architects					00003	Dubin	Circuit Court Office, Aras Ui D
man	<u></u>		mar	1	A040/	welly we	Polopinenterneterneterneterneterneterneternet

8. Input the relevant information

Full Name:	Input the Full Name		Add Ca	se Associate	×
First Name		General Ot	her details Other types Notes Other Case Involvemen	ts Bank Deta	ils
First Name		Details			
& Surname:	These will automatically be	Type *	Banks	Code *	Enter a code
a sumanie.		Full name *	Enter full name	Phone no	Please enter phone number
	inputted from the full name	First name Surname	Enter first name	Fax no Home	Please enter fax number
	-	Salutation	Please enter salutation	Home Mobile no	Please enter home number Please enter mobile number
	field amend if required.	Company		E-Mail	Please enter E-Mail id
		Title	Please enter title	DX ref	Pleae enter DX ref
Salutation:	Input the Salutation	Address	Please enter address	County	Please enter county
Salatation	input the bulutution			Postal Code	Please enter postal code
Company:	Input the company name				Retired
Title:	Input the title ie. Mr, Mrs etc.	Relationsh	ip Name Phone Email		New Edit Delete
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 assig	gn a i	numeric code.		Qk [Gancel]
Phone No:	Input the main phone number				
Fax No:	Input the fax number				
Home:	Input home phone number				
Mobile:	Input mobile phone number				
E-Mail:	Input e-mail address				
DX Ref:	Input the Document Exchange refe	rence	e if applicable		
Nominated:	Tick is this is the nominated contac	t.			
County:	Input the county.				
Post Code:	Input the post code.				
Retired:	Tick the box if a case associate is no selected.	o lon	ger required to pre	vent	them from being

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

1

Carda AIROOS

Add Associate Contact

×

Input the following details as required:

	Associate code	AIBOUZ		10	0	
Name Address, Salutation Title Email Relationship to the associate, Phone number Fax number Mobile number Notes	Name: * Deirdre Nolan Address: * AlB Sutton Cross Dublin 13 Salutation Title: E-Mail: Relationship: Note: Manager of Sutto	Deirdre Ms DeirdreNolan@aib.ie Manager	Phone: Fax: Mobile:	01-8955645 01-8955624 087-963211		
					Ok	ancel

- 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.

1	Case Associate AIB002 has been added successfully
	Ok

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

How to amend a Case Associates Details

- 1. Open a case in the Case Diary.
- 2. Click on Associates on the Navigation panel.
- 3. If the Associate is assigned to the case **Double Click** to **amend**.
- 4. Otherwise click on **Add Professional** Add Professional on the Home tab of the Ribbon.
- 5. Click on the **category** of case associate you want to add e.g. Bank.
- 6. Search for the associate you want to amend.
- 7. Click on the **Edit Tool** *Edit*; the following dialogue box will appear.
- 8. Click on each *tab* and amend the details as required.

General

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

			m - 1							Sequer	1	
	issociate C	ontact	Details	Other detai	s Other Typ	es Notes	Utner Case I	nvorvemen	ts Bank Details	Sequen	ice 1	-
Details												
Type *	Solicito	rs				\vee	Code *	ADA002				
Full name '	Brian P.	Adams					Phone no 0506 21866					
First name	Enter fi	rst name					Fax no	0506 514	143			
Surname	Enter s	urname					Home	Please er	nter home number			
Salutation	Sirs						Mobile no	Please er	nter mobile number			
Company	Brian P	Adams					E-Mail	brianada	ms@eircom.net			
Title	Please	enter titl	le				DX ref	DX 43006				
Address	Solicito							Nomin	ated			
	Cormac Tullamo	ore					County	Please er	nter county			
	County	Offaly					Postal Code	Please er	nter postal code			
								Retired	i			
Specific In	formation	For Cas	e									
Other Sid	de Details						Insurance D	etails				
Our Code	e	Enter o	our code				Our Code		Enter our code			
Other Re	ference	Enter o	other refe	rence			Insurance R	eference	Enter insurance rel	ference		
Associate	for the ot	ner side	Publi	sh								
											<u>o</u> k	Q
												-

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

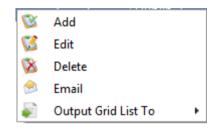
eneral Oti	her details	S Other types 1	Notes Other Case	Involvemen						
Details	ner details	Other types	Notes Other case	involvemen	ts Bank Detai	6				
Type *	Banks				Code *	Code * AIB011				
ull name *	AIB				Phone no	01-234 5600				
irst name	Enter fit	rst name			Fax no	01-234 5691				
Surname						Please enter home nu	mher			
Salutation	Sirs/Ma				Mobile no	Please enter mobile n				
Company	AIB				E-Mail	info@aib.ie				
itle	Sirs				DX ref	Pleae enter DX ref				
Address	Sutton	Cross			County	Please enter county				
(GOILE 33	Dublin					Please enter postal co	da			
					POster Goue	Retired	iostal code			
						Netres				
Search Relationsh	ip	Name	Phone	Email		Address	New Edit	X Delete		
Manager		Deirdre Nolan 01-234 5678		d.nolan@a		AIB Sutton Cross Dublin 13				
							Qk	<u>C</u> ance		
				nfrom Can Mageme	g (0x-5acmar-308/000)					
+/>	٢	ng Martan Setay Halp	5	nyhouse Case Stenagemen	g (0lawaa88/88)					
et tot	Associate Type	Associa	des .		g (3h. farmar, 400 (100)					
et bit bit bit bit bit bit bit bit bit bi	Associate Type tark Associate Type	0) Associa	ntes	e fatived Address		Naria (Augr)	(and the set of the se	Timolard v		
ch/Open	Associate Type	Associa 0	ntes Numer/Congany 48 (HS)	e fadirad	Dudiny 12	Manta Sagon (anami 11 ann		•		
thiOpen	Associate Type teek Associate Type	0 Code Code Code Code Code	Ales balance and the second se	e Patired datives altres Coose 10 Main Street d'esté Sa é State Street	(Julion I) (J. Quillon,	01-234 5600		Bandard V 99 9045		

Other Types	Click on the Other Types tabs to see if this associate is a member of any other category.
Other Details (optional)	Click on the Other Details tab to add a specific court and court date.
Notes	Click on the Notes tab to add additional notes about the case associate.
Other Case Involvements	Click on the Other Case Involvements tab to view a list of cases this case associate is connected to.

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

How to Remove a Case Associate from a Case

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



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

How to add a Contact to a Case Associate

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

		_			Edit Case	Associate			
General	Associate Contact	Details	Other details	Other Types	Notes	Other Case Involvements	Bank Details	Sequence	1
Search			New Edi	t Delete	📡 Assign	(Unassign			
Relation	ship Name		Phone	Email		Address			
							,	~	

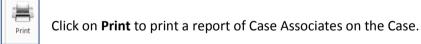
3. Enter the required information and click OK. As the address of the Associate is already in the system it is not necessary to re-enter it on this screen.

Ì		Add Associate Conta	ct		×
Associate code	BLO001		ID	13	
Name *					
Enter name					
Address					
Enter address					
					4
Salutation	Enter salutation	Phone	Enter phone nu	mber	
Title	Please enter title	Fax	Enter fax numb	er	
E-Mail	Enter email ID	Mobile	Enter mobile nu	umber	
Relationship	Enter relationship				
Note					
Enter note					
Lince note					
				Ok Cance	

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

Print Options

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



Generating Tasks

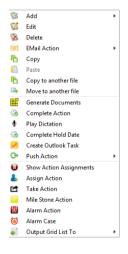
Each case has a specific case plan assigned to it when it is set up. Each Case Plan is made up of a series of Tasks; these tasks will often have attached documents, which will be processed when a task is generated. When a task is completed a follow-up task maybe inserted in the Case Diary for processing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

Distanti Corresti Distanti	Phone Log Maintain Setap Help	Keyhouse Case Management (OI - Georinous - 0001-1730)	(R Quick Search (Orl + Q) -
🗳 🚔 0	Fisher up remease area from the fisher of the fishero of the fisher of the fisher of the fishero of the fishero of		
Client/Case	Case: SNV101/0001		Tel: 05906.8
Case Diary	Laura Smyth v Joe Byrne		E/e: MK
Document Manager	WRINING : Money Laundering checks have not been completed for this client.		Ignora Show
Current Client Details	S least	Dandari	New Preview
Carrent Case Details Other Case Details	C. A. P. D. A. Date Time Handler Synopsis	Action 0	
Associates	a los no	2004	Preview Document
Critical Information			R. PERMIN LOCATION
Know Your Client			
A/c Ledger			
A/L Ledger Time Ledger			
Debt Ledger			
Reserve Ledger			
Undertaikings			
Strong Room			
strong hoom			
			~
	Attachments Isanh	Standard View	— .
	Type Document	Venion Date Document Class	10. T
Tasks	The proven	COCLEMENT CARE	~
Search/Open			
Client/Case			
Time Costing			v .

- 2. To view the case plan move your mouse over **Action** located to left of the Case Diary Screen the Case Plan will appear.
- 3. Click on the **Pin** 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** and the case diary toolbar.
 - Or
- 1) Right click on the task
- 2) Select Generate Documents from the pop-up menu.



To Complete A Task

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

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

- Method 2: **Right Click** on the action. This will allow you to complete the action using different dates if needed.
 - 1) Click on **Complete Action** to complete the action with today's date

- 2) Click on **Complete Hold Date** to complete the action with the same date as it was generated.
- NOTE: If documents are to be Read Only once completed, ensure the Read Only Documents On Completion Actions option is ticked Administration Options. See the Administration Section of the New Framework Admin Manual.

Working with Tasks in the Case Diary

How to Insert Tasks in the Case Diary

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

Drag to case diary to insert action

- ×

3. Click OK.

Changing Tasks

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

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

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

	Case Diary	Action
	Choose your prefered option. Click "Open Document" to open the document for this action or click "Open Action Details" to open the action details.	Generate Document © Prost Time in Note Play Dictation Play Dictatia Play Dictation Play Dictatia Play Dictation Play
	Open Document Open Action Details	Case ABA0010001
2.	Amend the following details as required	Solgiet Letter to Solicitor en Pleading General Email Appointment Fighander Cambridge Alban Y Team Commercial Y
		Letter to Solicitor re Pleading

- a. On the General Tab amend the following details:
 - Case: This will default to the current case; to change click on the **button** and select the required case.

Action											
Generate Doc					High	Take Action	🕲 Generate	🕲 Save			
Open Attachn					Normal	Assign Action					
Play Dictation			🔗 Email (Te	emplate)							
		It Actions			Priority	Assignment	SDLT				
General Prop	perties At	tachment/l	Documents	Action A	Assignments	Other Notes					
Case	ABA001/00	001		amily Law							
Action Code	G03			etter to Sc	olicitor ?						
Date	04 May 20	16	Y D	ue Date	04 May 2016	×					
Subject	Letter to S	olicitor re l	Pleading								
General	Email Ap	pointment									
Fe/Handler	Carol N			-							
Team Letter to So	Comme	rcial									
Team	Comme	rcial									
Team	Comme	rcial									
Team	Comme	rcial								Ok	Canc

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

- You can amend the date of task if required. Click on the down arrow to reveal a Date: 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	۱	Change Action (3076)	- ×
	and click on the	Action	High 🛃 Take Action	
	status of the case	Open Attachment Open Attachment Play Dictation	Normal 🕹 Assign Action	
	when this task is	Default Actions General Properties Attachment/Documents A	Priority Assignment action Assignments Other Notes	
	complete. E.g. Pre-	Action Status NA 👻 Flag 🕼 Clear Flag 💌	Not Applicable	
	Proceedings,	Publish	Priority	Category
	Proceedings	None Publish Only Export Only All	High Normal Low	Action Fixed Dated Action Note Appointment
	issued.		Other Properties	Reminder Email Phone Message Dictation Undertaking
Publish:	This applies only to data that is	Publish Status Communication Sent	Complete Bilable Documents Processed Know Your Client	Strute Date Critical Date Court Date Scanned Post/Mail Cheue Request
	published to an			Photo ID Non Photo ID
	external source.			Ok Cancel
	Using the option			
	buttons set as requir	ed.		

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

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

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

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

- c. Click on **the Attachment/Documents tab** to reveal the following screen. A list of documents processed on this task will appear.
 - The following actions can be performed in this window

Gener	ate Document	Post Time Note		High	Take A	tion	NR A	Attachment	Delete Attach	ment 📋 Paste	Save .
	Attachment	✓ Complete		Normal	& Assign		_	ink to Folder	Precedent	History	-
		Print Email (Te		Low	Assign	ACTON	_	dit Attachment		Pistory	
мау Б	ictation		mpiate)				Mar.	dit Attachment			
		fault Actions		Priority	Assignn				Attachment		
ieneral	Properties	Attachment/Documents	Action As	signments	Other N	otes					
	Date Entered	Document	1	(ersion	Doc Class	Track F	Ref	File Path			
1	03 Nov 2015	Letter to Witness Witness	es 2	1	Corresp	2	640	t\keyhouse\cli	ent documents\BI	A001\0001\Lette	r to
13	03 Nov 2015	Letter to Insurance Comp	any	1	Letters/I	2	2639	t\keyhouse\cli	ent documents\Bl	A001\0001\Lette	r to I
1	03 Nov 2015	Letter to Engineer		1	Corresp	2	638	t\keyhouse\cli	r to		
12	03 Nov 2015	Letter to Gardai		1 Corresp 2637 t:\keyhouse\client documents\BLA001\0001\Lette							r to
18	03 Nov 2015	Letter to Witness		1	Corresp	2	636	t\keyhouse\cli	r to		
13	03 Nov 2015	Letter informing Client af	ter firs	1	Client Le	2	635	t:\keyhouse\cli	r inf		
18	03 Nov 2015	O'Byrne Letter to Defend		1	Letters/I			t\keyhouse\cli			
				1	Letters/I	2	633	t\keyhouse\cli	ent documents\BI	A001\0001\Warr	ning
18	03 Nov 2015	Letter to Doctor requesting	ng Me	1	Corresp	2	632	t:\keyhouse\cli	ent documents\Bl	A001\0001\Lette	r to
18 18	03 Nov 2015 03 Nov 2015	Warning Letter to Defend Letter to Doctor requestion							ent documents\Bi		

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
		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
		Letter to Gardai	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
		Letter to Witness	03 Nov 2015	1	03 Nov 2015	Correspondance	Case
		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

Attachment/Documents

Open an attachment

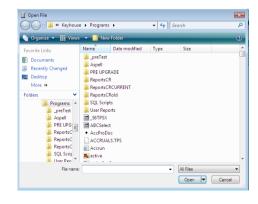
- i. **Double Click** on the attachment you want to open.
- ii. Or Click on Open Attachment
- iii. The Word Document will then open in Word to edit, print etc.

Add an attachment to a task

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



	Document Properties	×
Details File Information	ation	
Document Name:	Letter to Lending Institution	
Document Date:	04 Nov 2014	
Document Class:	Letters/Interparty Correspondance	*
Document Type:	Document	
F	Ok Cancel	

- ii. Click on the **edit attachment** Click 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.

_		O Post Time 🦲 Note	t High		Take Action				📫 Delete Attachment 📋 Pas		📽 Save	
		🗸 Complete 🎐 Email	Norr		Assign A		_		Recedent	 History 		
🕏 Play Di			plate) 👎 Low				(S)	dit Attachment				
	De	fault Actions	Priori	ty	Assignm	sent			Attachment			
General	Properties	Attachment/Documents	Action Assignm	ents	Other No	otes						
	Date Entered	Document	Version		Doc Class	Track R	lef	File Path				
5	07 Sep 2015	New sign-in from Chrome	on	1	General	2	599	t\keyhouse\clie	ent documents\BLA00	1\0001\New :	ign	
1	07 Sep 2015	keyhole		1	General	2	600	t\keyhouse\clie	ent documents\BLA00	1\0001\keyho	ile_2	
	07 Sep 2015	profilephoto		1	General	2	601	t\keyhouse\clie	ent documents\BLA00	1\0001\profile	eph	
	07 Sep 2015	google_logo		1	General	2	602	t\keyhouse\clie	ent documents\BLA00	1\0001\goog	lejlo	
	07 Sep 2015	windows		1	General	2	603	t\keyhouse\clie	ent documents\BLA00	1\0001\windo	ws	
	07 Sep 2015	down_arrow		1	General	2	604	t\keyhouse\clie	ent documents\BLA00	1\0001\down	arr	
> 🚺												

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. 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.** Solution
- 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 Inform	ation	
Document Name:	Letter to Lending Institution2	
Document Date:	04 Nov 2014	
Document Class:	Letters/Interparty Correspondance	~
Document Type:	Document	
	Ok Cancel	

						C	hang	e Action (978	3)						- ×
Action															
Gen	erate Document	🕜 Post Time	e 📒 N	lote	1 Hig	jh 🖻	Tak	e Action	😰 Save						
ope	Open Attachment 🛛 🖌 Complete 🔶 Email			No	rmal 🌡	Assi	gn Action								
Play	Play Dictation 🛛 🛲 F		øĐ	mail (Template)	🖡 Lo	w 👗	Dele	ete Assignme	nts						
	Def		Prio	rity	A	ssignment									
Gener	al Properties	Attachment	t/Docu	ments Action	Assign	ments (Other	r Notes							
	Ву	Actio	n	For		Date Assigned		Time Assigned	Date Returned	Time Returned	Assigned By	Returned By	Delegate	Team	A
۰ 🗸	Brian Sweeney(E	3S) Proci		Brian Sweeney(BS)	12 Feb 20	014							COM	<u>^</u>
-	Brian Sweeney(B	BS) Proce	essed	Brian Sweeney(BS)	21 Jan 20	014	14:34		23:59	BS	BS	BS	COM	
	Brian Sweeney(B	BS) Com	plet	Brian Sweeney(85)	18 Jan 20	12	11:10	31 Jan 2012	09:37	BS		BS	COM	
-	Brian Sweeney(B	BS) Com	plet	Brian Sweeney(BS)	06 May 2	011	11:10		23:59	BS	BS	BS	UT	
	Brian Sweeney(B	BS) Proce	essed	Brian Sweeney(BS)	06 May 2	011	11:10		23:59	85	BS	BS	COM	
	Brian Sweenev(B	3S) Creat	ted	Brian Sweenev(BS)	04 Mar 2	015	10:11	06 May 2011	11:10	8S		BS	UT	



12	Add •
C	Edit
X	Delete
1	EMail Action
ъ	Сору
	Paste
ъ	Copy to another file
14	Move to another file
	Generate Documents
0	Complete Action
٠	Play Dictation
0	Complete Hold Date
1	Create Outlook Task
C•	Push Action
N	Show Action Assignments
2	Assign Action
	Take Action
	Mile Stone Action
Ø	Alarm Action
۱	Alarm Case
	Output Grid List To

2. Click on Copy. 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 another matter.** 🚹 Copy to another file
- 3. A list of cases will appear search for the required case.
- 4. Then **Double click** to select.
 - **NOTE:** You will automatically move to the case diary of the case selected.

Moving a Task to another matter

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

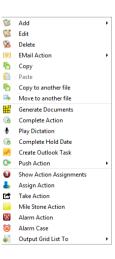
NOTE: You will automatically move to the case diary of the case selected.

$\overset{\circledast}{\mathbb{V}}$ 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. 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.

Reso	urces				
Date	04 Nov 2	014 V Tir	ne: 19:32		
Se	arch				
	Code	Name	Number o Due Tasks	Toom	
۱.	ADM	Admin		LIT	
	AM	Anne Mellon	5	COM	
	BS	Brian Sweeney	7	COM	
4	L COM	Commercial		COM	
4	LIT -	Litigation		LIT	
	MW	Martina Winters	1	LIT	
	SK	Stephen Keogh	1	COM	
			Release Action		anc

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.

										Keyhouse Case Management (CN - Carol Nolan - 00:00 / 07:30
Home Case Report	s Ph	ione	Log	1	Aaint	ain	Setup Help			
New Item - Print - Captu	ure Ger		te Co		ete /	Actio	n Start Timer Po Account			
A ClimatiCara	Cas	e: B	LA00	1/0	001			Gordon	T. Black	
Client/Case								RTA Wa	lkinstown Cro	issroads. G. Black
Case Diary										
🚺 Document Manager	WA	RNIN	4G : I	nvo	ices i	outsi	anding over 3 Ye	ears 6 Monti	hs 1 Days .	
Sourcent Client Details		8	Sea	irch						
Surrent Case Details		-					Date	Time	Handler	
Other Case Details Associates	Action		. A	P	D	A				Synopsis Statute of Limitations Date = 25/03/2015
Critical Information			9				15 Mar 2015	17:00	BS	Review File
👌 Know Your Client		-		1			13 Mar 2015	17:17	BS	
Chow rour chem		-					04 Mar 2015	10:11	CN	Prepare Papers for Counsel.
A/c Ledger		0		1			28 Oct 2015	11:51	CN	provide proof of ID
Time Ledger		•				U	07 Sep 2015	15:33	CN	Email From:no-reply@accounts.google.com - New sign-in from Chrome on Win
Debt Ledger		۷				8	07 Sep 2015	15:29	CN	Email To:Shaun Dwyer - [BLA001/0001] Gordon T. Black
Reserve Ledger		•					01 Sep 2015	12:15	CN	Letter to Client ?
						8	04 Aug 2015	12:35	CN	Email To:'training.keyhouse.ie@gmail.co - Test Email
		•				8	04 Aug 2015	12:31	CN	Email To:Brenda Hartley - [BLA001/0001] Gordon T. Black
Strong Room		•	۲			8	28 Jul 2015	15:05	CN	Email To: - [BLA001/0001] Gordon T. Black
		•				ł	03 Mar 2015	17:23	BS	test
		•				8	03 Mar 2015	17:17	BS	Letter to Client
		•	1			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 below of a search for "client".

Home Case Repo	ofter Day	rtner:		hone L		Maintain Se	tup Help		Keyhouse Case Management (CN - Carol Noiae
🕲 🚔 () <mark>6</mark>	*	Com	1		n Start Timer Po Account	Ö ost Time		
Client/Case	Case	e: BL	A001/	0001		4 >		n T. Black	
Case Diary							RTA W	alkinstown Cro	ssroads, G. Black
Document Manager	WA								
Scurrent Client Details Current Case Details		8	client			C			
🗦 Extra Case Details	四	٩.	A., I	P D.	A	Date	Time	Handler	Synopsis
Associates	Action	-				12 Feb 2016	11:49	CN	Letter to Client
Critical Information		12		14		12 Feb 2016	09:51	CN	Letter to Client
Know rour client		22				12 Feb 2016	09:46	CN	Letter to Client
🖬 A/c Ledger		12				12 Feb 2016	09:39	CN	Letter to Client
Time Ledger		•		1		24 May 2016	17:27	CN	Letter to Client
Debt Ledger Reserve Ledger		•		10		12 Feb 2016	11:58	CN	Letter to Client
Undertakings		•				01 Sep 2015	12:15	CN	Letter to Client ?
						03 Mar 2015	17:17	85	Letter to Client
Strong Room		•				09 Dec 2010	22:12	BS	Ask Client to call to sign Application form PIAB
		•				18 Nov 2010	22:08	BS	Has Client confirmed appointment ?
						12 Nov 2010	22:06	RS	Send Client for own medical exam.

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

How to sort and filter the Case Diary Columns

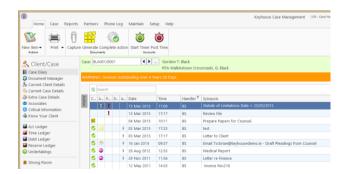
- 1. Open a case in the Case Diary.
- 2. Click on the required **column heading** to sort by that column.

How to filter Case Diary Columns

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

andler	9 y Svn	opsis
JP	(Blanks) (Non blanks)	pice No:2
CN	ADM	ation
BS	BS	al Letters
BS	CN	flict Sear
BS	JP	se Letter
BS	Cha	ise Letter

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 Reports	Phone Lo	g Maintain Setup Help			Keyl	iouse Case Management	(CN - Carol Nolan -	00:01 / 07:29)				Quick Search (Ctrl + Q)
ev Item - Print Export		tr Timer Post Time Acceurts	compile Brief) Use Adobe Pl		MS Word Workshare						
Client/Case	Case: BLAC	01/0001 Gordon T. Black RTA Walkinstow		Black								Tel: 01 476 F/e: BS
Case Diary Document Manager	Search	💛 🗌 Search text								s	andard View 🕅	Letter to Client
Current Client Details	Type §	Document Name	Diary Date	Date 🔻	Version	Document Class	Source	From	То	Subject	File	
Current Case Details	• 8	Letter to Client	12 Feb 2016	12 Feb 2016	1	Client Letters	Case			Letter to Client	t:V: ^	BLA001/0001/BS/AM
Extra Case Details Associates	E	Letter to Client	12 Feb 2016	12 Feb 2016	1	Client Letters	Case			Letter to Client	t:∖k	
Critical Information	6	Attendance Sheet	12 Feb 2016	12 Feb 2016	1	Instruction Sheets	Case			Initial Attendance	t:\k	12 February 2016
Know Your Client	B	Letter to Client	12 Feb 2016	12 Feb 2016	1	Client Letters	Case			Letter to Client	t:\k	
A/c Ledger	6	Letter to Client	12 Feb 2016	12 Feb 2016	1	Client Letters	Case			Letter to Client	t:\k	Gordon T. Black
Time Ledger	6	Letter to Client	12 Feb 2016	12 Feb 2016	1	Client Letters	Case			Letter to Client	t:\k	23 Ellis Park
Debt Ledger	12	Letter to Client	12 Feb 2016	12 Feb 2016	1	Client Letters	Case			Letter to Client	t:\k	Rathmines Dublin 6
Reserve Ledger	R	Letter to Client	12 Feb 2016	12 Feb 2016	1	Client Letters	Case			Letter to Client	t:\k	Dublin 6
Undertakings		down_arrow	07 Sep 2015	07 Sep 2015	1	General	Received E-m	no-reply@acc	keyhousetest	New sign-in from Chrome on Windows	t:\k	1
Strong Room		windows	07 Sep 2015	07 Sep 2015	1	General	Received E-m	no-reply@acc	keyhousetest	New sign-in from Chrome on Windows	t:\k	1
		google_logo	07 Sep 2015	07 Sep 2015	1	General	Received E-m	no-reply@acc	keyhousetest	New sign-in from Chrome on Windows	t:\k	
	6	profilephoto	07 Sep 2015	07 Sep 2015	1	General	Received E-m	no-reply@acc	keyhousetest	New sign-in from Chrome on Windows	t:\k	Re: RTA Walkinstown Crossroads

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.

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

- 4. Click on a document to view in the preview pane.
- 5. **Double click** to the open the document.
 - **NOTE:** For information on the Document Manager see Chapter 16.

Processing Documents

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

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

What type of information is requested when processing documents?

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

Select Documents to be processed

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

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

Naming and classifying a Document

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

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

	cument Selection	at the local difference line		×
Tag	document for p	ocessing.		
Sea			Go	Clear
	μ		00	
-	AUCLT	Letter to Auctioneer?		N
1	GENG02A	Letter to Client ?		N
н	44 4 ? > >>			Þ
Т	ag/UnTag		Cancel	ol.
	ag, on ag		Cancei	<u>O</u> k

Document File Nam	e Required	and a second			
Matter:	BLA001/0001 RTA Walkinstow	Gordon T. Black m Crossroads, G. Black			
Document Na	me: Letter to Client	?		Ok	Cancel
<u>C</u> lass/Categor	y: CLI				

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

Adding Case Associates when generating a document

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

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

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

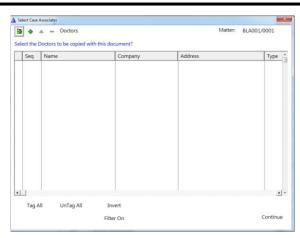
- 1. The following dialogue box has appeared requesting the user to select a Solicitor for this letter.
- A Select Case Associates 🚱 💠 🔺 🕳 Solicitors Matter: BLA001/0001 Select the Solicitors to be copied with this document? Seq Name Company Address Type 1 Allsop & Browne Allsop & Bro 2 Baggott StreetDublin 2 D . UnTag All Tag All Invert UnTag Filter On Continue
- 2. There is two solicitors assigned to this case, you can tag the solicitor provided then click on the amend button solution to add a reference.
- 3. **Input** the other side's reference in "Other Ref" (circled in red, right)
- 4. Or if the solicitor displayed is not the solicitor you want to write to click on the green plus with the yellow folder and add the new case associate as previous outlined in the section on "How to Add a new Case Associate".
- 5. A screen will reappear listing the solicitors on the case.
- 6. Check the appropriate box(es) to **tag** the required solicitor(s).
 - Note If you tag two solicitors two documents will be generated.
- 7. Click Continue.
- 8. Word will open displaying the letter to solicitor.
- 9. Edit the document in Word as normal as required.
- 10. Save any changes and Print as required.
- 11. The action/task and document will then be present in the Case Diary for future review.

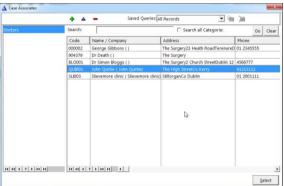
Select Case Associates Select Case Associates Select the Solicitors to be copied with this document? Seq Name Company Address Type of the second secon													
Type* Garda Code* #00001 Full Name* Stellergin Station Phone Number 283445 First Name Garda name Phone Number Enter nameber Statation Garda Jones Mobile Number Enter nameber Statation Garda Jones Mobile Number Enter nameber Company Statation Garda Jones Nohe Father mail Title Statation Garda Jones Nohe Father mail Title Statation Garda Jones Nohe Father mail Address Statation Company Steleroco Specific Information For Cate Our Code Enter our code Our Code Enter our code Insurance Reference Our Code Enter our code Insurance Reference Our Code Enter our code Insurance Reference Select Case Associates Mater Address Type Selet Case Associates Mater Selectors to be copied with this document? Select the Solicitors to be copied with this document? Mater Selectors Solicitor Select the Solicitors to be copied with this document? Insurance Reference Type 1 Allsop & Browne Allsop & Browne 2 Baggott StreetDublin 2. Sol	neral Assoc	ciate Contact	Details	Other details	Other Type	is Notes	Other Case Inv	olvements	Bank Details	Sequence	1		
With Name * Estilergan Station Phore Number 2833445 First Name * Ender Formanden Fisk Namber Ender Formanden Sakatzion Garda Antoin E-Mail Ender Formation Sakatzion Canada Sakatzion E-Mail Ender Formation Sakatzion Canada Sakatzion Ender Formation Ender Formation Sakatzion Canada Sakatzion Ender Construct Ender Construct Specific Information For Case Finiter county Proto ando Ender Formation Out Code Inter our code Inter our code Inter our code Out Code Inter our code Inter our code Inter our code Out Code Inter our code Inter our code Inter our code Select Case Associates Ender Stele Details Our Code Inter our code Select Case Associates Ender Stele Details Matter: BLADOI/NOOIL Select Case Associates Ender Stele Details Inter our code Interour code Select Case Associat	Details												
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Example 2: Letter to Doctor – Setting up a new case associate

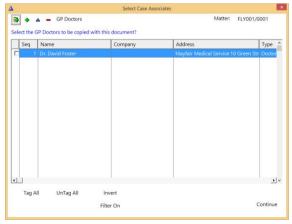
In the following example the document being processed is a letter to Doctor, the Doctor is not present in the case associates so he needs to be added to the list of doctors and assigned to the case.

- 1. The following dialogue box has appeared requesting the user to select a Doctor for this letter.
- 2. No doctors have been assigned to this case so the user needs to add one.
- 3. Click on the **Green Plus with the yellow folder b** and the following screen will appear.
- 4. Highlight for the doctor required and click Select
 Select
 If the doctor your require is not in the list then click Green Plus
 - Remember to always perform a search to ensure the case associate is not already on the system.
- 5. Complete the screen with all relevant information and click OK
- 6. The doctor will now be visible in the list.
- 7. Highlight the doctor and click Select **Select**. The following screen will reappear listing the doctor assigned to the case.
- 8. Using the tick boxes provided **tag** the required Doctor and click **Continue**.
- 9. Word will open showing the letter to doctor
- 10. **Edit** the document in Word as normal as required.
- 11. Save any changes and Print as required.
- 12. The task and document will then be available in the Keyhouse Case Diary for further review.





🖏 Add asso	ociate party – 🗆 🗙
General Details (Diter Details (Diptonal) Notes Diter case involvem	Phone No FaxNo Kocie No Kocie
Title: Company: Address	E Mail DX Ret: County: Pestal Code
◆ ▲ ● ▲ Ango Search Relationship Name Phone Phone If (<	Go Cert A stripted Contact Image: Contact Image: Contact Image: Contact Im
Specific Information for case FLY001/0001 Other Side Details Out Code Other Ref	Cencel



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 2nd 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 Va	riable			×
General Prope	rties			
BLA001/0002	Gordon T. Black			
Secretary's Re	Sale of 2 Trinity Close, Rathgar, Dublin 6 ference			
,				
				<< >>
		N/a	ОК	Cancel
				cuncer
📩 Client/Case	Case: BLA001,0002 Gordon T. Black 2 Trinity Close, Rathgar, Dublin 6			
& Current Client Details	Form (Default View) Y Search			
Surrent Case Details Other Case Details	Detail List the Contents passing with the house of any.	Value		
 Associates Critical information 	Contents NOT passing with property ? (f any) Sale Price of property ? (f any)	N/A 200,000.00		
have Your Client	Deposit Amount in full (e.g. 10,000,00) 7	20,000.00		
A/c Ledger	Description of the property for the Contract.	in the property know Copy File Plan	m as Folio 1234F	
if you you and me	The predictor be leaded in Descriptions Schedule in the Contract.	Conv.Morto	a some	and presented a
	Maintain Other Case Details			>
General Prop	erties			
BLA001/000	2 Gordon T. Black			
	Sale of 2 Trinity Close, Rathgar, Dublin 6			
Contents N	OT passing with property ? (if any)			
Curtains in	sitting room			
			0	Cancel

Generating an Email without an Attachment using the Email Template

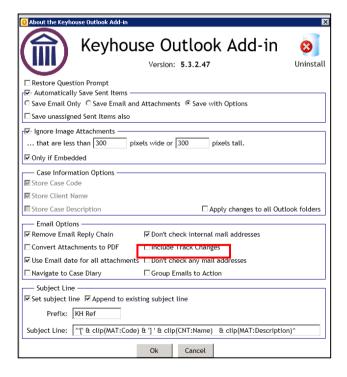
- 1. Double click on the **action** to generate it.
- 2. This will take you to **Outlook**. The email can then be edited and sent in the normal way.
- 3. Return to Keyhouse and **complete** the action in the normal way. See **Marking a Task as Complete** (p. 64) for further information.

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.,	0.	A.,	Date	Time	Handler	Synopsis
Initial Consultation		Hi.				1	04 Mar 2015		ON	Prepare Papers for Counsel.
PIA8 commencement Letters to all Parties		•	0	1			28 Oct 201	Add Febr		e proof of ID
Chase Letters		6	2			1	07 Sep 20 🎽	Delete		romno-reply@accounts.google.com - Nev
Pay for Medical Report		•				1	07 Sep 20	EMail Action		t (g) Ethil Action
Draft Form A and contact Client to review Me	dical	6					01 Sep 20	Copy		(*) EMail Action (using Template)
Client appointment to review Medical Report	and	•	3			1	04 Aug 20 👔	Paste		fortraining.keyhouse.ie@gmail.co - Test Em
Issue PIA8 application		•	3			1	04 Aug 20 🌓	Copy to anoth		odbrendia Hartley - (BLAD01/0001) Gordon
Check on PIAB admowledgement (s 50)		•	3			÷	28 Jul 201: 🎴	Move to anot		ec - (8LA001/0001) Gordon T. Black
Review PIAB application		•				1	03 Mar 20	Generate Doc		
Send Special Damages schedule to PIAB		6				1	03 Mar 20	Complete Act		to Client
PIAB Assessment and Brief		•					16 Jan 201	Complete Ho Create Outling		ocbrian@keyhousedemo.ie - Draft Pleading
Error in Medical Report		•	٥			1	28 Aug 20 🥫	Show Action a		al Report
Chase Barrister		•	Q			1	29 Nov 20	Assian Action		e Finance
Contact Client re PAB Barrister Opinion		•				1	22 Nov 20 😁	Take Action		o: - Draft Pleadings
Client appointment to decide on Assessment		•	٢,				11 Aug 20 🔜	Mile Stone Ac	Sen	n Black
Accepting FIA8 Assessment		•					12 May 20 👪	Alarm Action		No.218
Take instructions on legal proceedings		3				1	19 Jan 201 🐱	Alarm Case		settlement
Review whether Monies received		•	٩			1	13 Jan 201	Output Grid L	ist To	al Statement
Cince file		6				1	05 Jan 2011	22:21	85	Reply to PI48 Queries

- 5. The email will generate in **Outlook** with the Attachment. The email can then be edited and send as normal.
- 6. Return to Keyhouse and complete the action. See **Marking a Task as Complete** (p. 64) 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 [‡] 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.

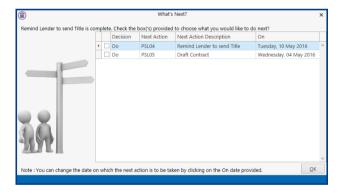


NOTE: The owner of the task is the only person who can mark the task as complete. This allows you to assign a task to another handler but ensures you have ultimate control over it.

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.

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

Home Case Reports	s Phone Log Mair	ntain Setup Help	•		Keyhouse Case Management (C)	i - Carol Nolan - 00.0	ð1 / 07:29)				Quick Search (Ctrl + Q)
New Item • Print • Captu	JIFE Generate Complete Documents	Action Start Timer P Account									
Client/Case	Case: BLA001/0001	4)		T. Black	ssroads G. Black						Tel: 01 476 F/e: BS
Case Diary					SSI Daus, G. black		_				
Document Manager Current Client Details	WARNING : Invoices	s outstanding over 3 Y	rears 8 Mont	ins 19 Days .							Ignore Show
Current Case Details	Search Search								Standard \	/iew	Preview
🕽 Extra Case Details	C A P D.	A Date	Time	Handler	Synopsis				Action Co	F	Warning Letter to Defendant 🥠
Associates	in 🗰	# 21 Jan 2016	17:13	CN	PIAB commencement Letters to all Parties		1		PIB02	• •	Preview Document
Critical Information Know Your Client	01	08 Jan 2016	11:59	CN	provide proof of ID				ADMUD	P	
		01 Sep 2015	09:42	CN	Critical Date				G23	P	BLA001/0001/BS
A/c Ledger	1	01 Sep 2015	09:42	CN	Review File				G16	P	
Time Ledger Debt Ledger	9 !	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 Terenure
Undertakings	#	04 Mar 2015	10:11	BS	Prepare Papers for Counsel.					P	Dublin 6
Strong Room	۵ ک		15:33	CN	Email From:no-reply@accounts.google.com - New sign-in from Ch	rome on Win			EMI	P	21 January 2016
Strong Room	ی ک	₿ 07 Sep 2015	15:29	CN	Email To:Shaun Dwyer - [BLA001/0001] Gordon T. Black				EMI	P	
	S	01 Sep 2015	12:15	CN	Letter to Client ?				G02	P	Re: RTA Walkinstown
	۵ 🛸		12:35	CN	Email To:'training.keyhouse.ie@gmail.co - Test Email				EMI	P	Crossroads, G. Black
	۵ ک	# 04 Aug 2015	12:31	CN	Email To:Brenda Hartley - [BLA001/0001] Gordon T. Black				EMI	P	Our Client: Gordon T. Black
	۵ ک	₩ 28 Jul 2015	15:05	CN	Email To: - [BLA001/0001] Gordon T. Black				EMI	P	Dear Mr Green,
	۵.	# 03 Mar 2015	17:23	BS	test				G13	P	We act for the above named who has
	<u>s</u>		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 🗢	If Jan 2014	09:37	BS	Email To:brian@keyhousedemo.ie - Draft Pleadings from Counsel				EMI	9	accident on the above date.
	S O	# 28 Aug 2012	12:33	BS	Medical Report				G13	P	We are satisfied from our instructions that
	S O	₽ 29 Nov 2011	11:56	BS	Letter re Finance				POO	4	you are responsible for this accident and
	S S	# 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
	S 5	11 Aug 2011	11:09	MW	Gordon Black				PHO	9	hereby call upon you to admit liability to our client in an open letter within 10 days from
	6	12 May 2011	14:33		Invoice No:218				DB01 020	6.	the date hereof.
			22:23	BS	Reject settlement						To the supplier of it hains account of the start
	Attachmen	Its Search							Standard View		In the event of it being necessary, our client' claim for damages will be the subject of an
Tasks	Type Doc					Version Da		Document Class			application to the Personal Injuries Assessment Board ("PIAB").
	🕨 🔃 Wan	rning Letter to Defend	lant			1 21	1 Jan 2016	Letters/Interparty Correspondance		^	Assessmithin Doard (PIAD).
Search/Open											In the event that it becomes necessary to issue proceedings against you, our client wil
Client/Case											as part of their claim, seek from you the co
Time Costing										~	<

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

Changing the Name and Class of a Generated Document

- 1. From the Attachment pane in the case diary. **Right Click** on the **Document**; the following menu will appear.
- Attachments
 Type Document
 Letter to Lending Instituti
 History
- 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.

	Document Properties	×
Details File Infor	mation	
Document Name	Letter to Lending Institution2	
Document Date	: 04 Nov 2014	
Document Class	Letters/Interparty Correspondance	•
Document Type	Document	
F	Ok Cancel	

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 Repo	rts Ph	none	Log	N	laintain	Setup Help				
🖹 🚔 (Ŕ		200	0	١	١			
Jew Item ▼ Print ▼ Cap Actions	oture Gei		ument		ete Acti	on Start Timer P Accoun				
Client/Case	Cas	e: A	BAOO	1/00	01	••	David A Family L	brahams aw		
Case Diary										
Document Manager		5	Sea	rch						
Current Client Details	Action	C	A	P	D A.	Date	Time	Handler	Synopsis	
Extra Case Details	ion	Ħ		1		19 May 2016	17:16	MW	Title Documents	
Associates		•	•				19 Jun 2014	11:41	BS	Invoice No:230
Critical Information		•			8	19 May 2014	16:32	BS	Letter from Accountant	
Know Your Client		•				01 May 2014	23:54	BS	Invoice No:229	
A/c Ledger		•	۲		9	01 May 2014	22:29	BS	Email From:keyhousedemo@gmail.com - Mobile Call to Brian Sweeney	
Time Ledger		•	۲		9	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		•	٢			27 Feb 2014	09:01	BS	David Abrahams	
Undertakings		•	۲		8	27 Feb 2014	07:08	BS	Email To:brian@keyhousedemo.ie - Sample Report for Key Performa	
Strong Room					9	16 Jul 2013	15:54	BS	Letter to Solicitor re title Letter to Allsop & Browne	
~ Jum		-	~	~~	m	m-m	m		many a many a many	

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 Log	g Maintain Setup H	lelp				
int - Add Edit Delet	te Discharge						
Client/Case	Case: ABA0	X01/0001	David Abrahams Family Law				Tel: 01-2 F/e: AM
Case Diary Document Manager	Search						Standard View
Current Client Details Current Case Details	Attn	Date	Туре	Who	Value	Details	Discharge
urrent Case Details ixtra Case Details issociates Critical Information Cnow Your Client	>	21 Jan 2016	Documents	Peter D. Jones & Co.		0.00 Title Documents	
A/c Ledger Time Ledger Debt Ledger Reserve Ledger							

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

Adding and Viewing an Undertaking

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

3. **Input** the following Information

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

			,		
Needs Attention:	Tick if it needs to be action.	General Extra Note		Add Undertaking	×
		Client :		Add as Commen	t to Ledger 🗌 Needs Attention
Date:	This is actual date of	Matter :	Landlord Dispute		
Date:		Date	19 Apr 2016	Diary Warning Date	
	the undertaking. Click	Type Financial	O Documents	Given or Received	Commercial or Non-Commercial
	the 🛄 button to	Undertaking To	Select a fee earner	v v x	
	select a date from the	Who	Enter who		
	calendar.	Details			
		Details	Enter details		
Diary Warning Date:	This is the date the				
	Undertaking Action	Value	0.00	Dealing Number	Enter dealing number
	•	Status	Select status	✓ Category	Select Category
	will appear on the Fee	Conditional	Enter condition		
	Earners Task List as a				
	To Do Item. This will				
	default to a system				<u>Q</u> K <u>C</u> ancel
	•				
	warning date to amend c	lick on t	he down a	arrow to view a	calendar and select
	a date.				
	a date.				
Туре:	Check the appropriate bu Documents .	utton for	the type	of undertaking i	.e. Financial or
Given or Received:	Select whether the unde	rtaking ł	nas been g	j iven by you or r	eceived by you.
Commercial:	Select whether the unde	rtaking i	s commer	cial or non-com	mercial
Authorised by FE:	Click on the down arrow undertaking.	to selec	t the relev	ant Fee Earner a	against the
Undertaking to:	Click on the down arrow is been given or received		t the relev	ant Case to who	om the undertaking
Who:	This will default to the se	elected c	ase associ	iate.	
Details:	Input a description of thi	s undert	aking.		
Value:	Input the amount the un	dertakin	g is for.		
Status:	Click on the down arrow	and sele	e ct the req	uired status.	
Dealing Number:	Input the dealing numbe	r			

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

۲				Keyhouse Case Management (CN - Carol Nolan - 0	0.01 / 07.29)		uick Search (Ctrl + Q)	5 ×
Home Case Reports	Phone Log	Maintain Setup Help						
Print - Add Edit Delete Underskings	U.S. Discharge							
Client/Case	Case: ABA0	01/0001	David Abrahams Family Law				Tel: 01-29 F/e: AM	
Document Manager	Search						Standard View	-
Current Client Details	Attn	Date	Туре	Who	Value	Details	Discharge	Pres
Extra Case Details	•						· · · · · · · · · · · · · · · · · · ·	^
Associates Critical Information Know Your Client								
A/c Ledger Time Ledger Debt Ledger Reserve Ledger								
Undertakings			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~				~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

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 🚇

	5	Sea	rch						
Action	C	A	P	D	A	Date	Time	Handler	Synopsis
on	₽	6				02 Nov 2015	17:22	CN	Photo Id
	₽				0	02 Nov 2015	17:16	CN	Letter to Client
	Ħ	0	1			27 Jun 2014	11:19	CN	Undertaking changed by BRIANS
	•					19 Jun 2014	11:41	BS	Invoice No:230
	\	~~	~	~	~	bother	when when when when when when when when	and the second	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.

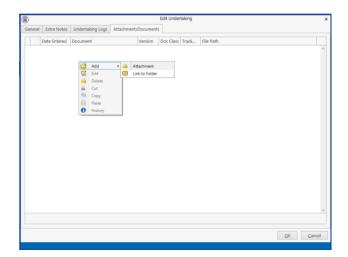
How to Edit an Undertaking

- 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.
- Click on the Extra Notes tab to add additional information and/or click on the Undertaking log to view the history of the undertaking.
- 5. Click **OK** to save the changes.

How to Add a Document to an Undertaking

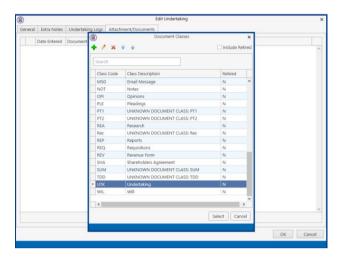
- 1. Go to the Undertakings screen.
- 2. **Double Click** on the undertaking to be amended. Click on **Attachment/Document.**
- 3. Right Click in the White Area and click Add

		Edit Und	lertaking		×
General Extra Notes	Undertaking Logs Attack	nment/Documents			
Client :			Add as Commen	it to Ledger	Needs Attention
Matter :	Sale of 10 Rose Lawn, Blanch				
Date	22 Jun 2016	~	Diary Warning Date	22 Jun 2016	>
Туре		Commercial or Non-Co	mmercial	Given or Received	
○ Financial	 Documents 	O Commercial	Non-Commercial	Given	O Received
Authorised Fee Earner	Carol Nolan		~		
Undertaking To	Liam Jones		✓ x		
Who	Liam Jones				
Details	Forward Deeds				
Decens	Forward Deeds				
Value	0.00		Dealing Number	Enter dealing number	
Status	Select status	~	Category	Select Category	~
Conditional	Enter condition				
					<u>O</u> K <u>C</u> ancel



- 5 × 4

- 4. Click on Attachment to add the document or Link to Folder to create a link to the location of the document.
- 5. **Navigate** to the location of the document e.g. Scan Capture folder and select the document.
- 6. Choose the correct Classification for the document and click Select and click OK



7. The document is now visible on the Undertaking Screen.

)				E	Edit Undertaking		×
G	eneral	Extra Notes	Undertaking Logs	Attachment/	Documents			
		Date Entered	Document		Version	Doc Class	Track	File Path
		22 Jun 2016	Undertaking to Forw	ard Deeds	1	Undertaking	2674	t:\keyhouse\client documents\FLY001\0001\Undertakin ^

How to Discharge an Undertaking

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

Print - Add Edit Deli Understör	te Discharge							
Client/Case	Case: ABAC	001/0001	David Abrahan Family Law	15				Tel: 01-290 F/e: AM
Document Manager	Search							Standard View
Current Client Details	Attn	Date	Туре		Who	Value	Details	Discharge
Current Case Details Extra Case Details		21 Jan 2016	Documents		Peter D. Jones & Co.	0.	0 Title Documents	Discharge
Associates Critical Information Know Your Client				Add Edit Delete				
A/c Ledger Time Ledger				 Discharge Output Grid List To 	Þ			
Debt Ledger Reserve Ledger								
Undertakings								

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

4. Input a description in the discharge description box.

0		Discharge U	Undertaking		
General Extra Notes	Undertaking Logs				
Client :			Add as Commer	it to Ledger	Needs Attention
Matter :	Family Law				
Date	27 Jun 2014	~	Diary Warning Date	19 Apr 2016	•
Туре		Given or Received		Commercial or Non-O	Commercial
O Financial	Documents) Given	Received	Commercial	Non-Commercial
Authorised Fee Earne	er				
Undertaking To	Select undertaking to		~ x		
Who	Peter D. Jones & Co.				
Details	Title Documents				
Value	0.00		Dealing Number	Enter dealing number	
Status	Pre Registration		Category	Select Category	
Conditional	Enter condition				
Discharge Date	19 Apr 2016	×			
Discharge Description	n				
					QK Cancel

- 5. Click **OK** you will then return to the undertaking screen where the undertaking will have a discharge date lodged against.
 - **NOTE:** It cannot be edited beyond this point.
 - **NOTE**: Not all users will have permissions to discharge an undertaking.

Undertakings Register

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

Add Edit Discha Undertakings) arge															
earch/Open	Search															Standard View
vlatters	Attn	Matter Ref	Client	Matter	Undertaking	Undertaking	Discharge Date	Authorised By	Value	Туре	For Who	Status	Action Given.	Discharge Description	Discharge By	Dealing Num
fatters		BAR001/0002	Tony Barry	Purchase 23 L	First Active - Undertaking re Sa	10 Mar 2010		Carol Nolan	245400.00		First Active	NA	721 Given			T82/98011
it Matters		BIL001/0001	Noel Billing		VHI - Refund medical expenses		21 Sep 2011	Justin Phelan	105000.00	F	VHI - Refund	NA	722 Given		JP	
cts		DEV001/0001	Noel Devlin		M8NA - repay credit card debt			Stephen Keogh	15124.26	F	MBNA credit	NA	723 Given			
iates		DOH001/0005	Frank Doherty	Employment L	Employment contract held	17 Sep 2011		Martina Winte	0.00	D	Stone & Co r	NA	724 Given			
iced Search	12	CAM001/0001			NIB - return title deeds if sale n	30 Jan 2010	30 Apr 2010	Carol Nolan	0.00	D	NIB Sale Proc.		725 Given		JP	
voices	3	CAM001/0002			Discharge balance of purchase		16 Feb 2012	Justin Phelan	202000.00	F	ES8 Discharg	NA	728 Given		BS	
eques		CAM001/0001			Redeem Mortgage to BOI	08 Apr 2010	16 Feb 2012	Justin Phelan	238342.50		BOI Redeem		729 Given		BS	
Log		DEM001/0002	John Demoman	RTA - Donnyb	Pay Church & General - Insuran	28 Feb 2009	03 Apr 2009	Brian Sweeney	25500.00	F	Church & Gen		730 Given		Jp	
Indertakings		FOX001/0001	Jennifer Fox		Al8 personal loan	24 May 2010		Martina Winte	45000.00	F	AI8 personal I	NA	732 Given			
Room		PUR001/0001	Mick Purcell	Lease renewal	To furnish orginal life policy do	12 May 2010		Brian Sweeney	0.00	D	AIB		733 Given			
ient Search		KEL001/0001	Mary Keller		Contact: €85,000 to be paid fro			Stephen Keogh	85000.00		AIB	NA	734 Given			
ite Library		LYN001/0001	Roger Lynch		Redeem credit card debit	15 Jan 2009	22 Mar 2009	Justin Phelan	7891.00		MBNA Credit		760 Given		BS	
		LYN001/0001	Roger Lynch		Repay loan out of sale proceeds	15 Jan 2009	22 Mar 2009	Justin Phelan	12134.67		Crumlin & Dis		761 Given		BS	
	1	LYN001/0001	Roger Lynch		Pay loan and overdraft from sa		22 Mar 2009	Justin Phelan	3852.65		AIB		762 Given		BS	
		LYN001/0001	Roger Lynch		repay car loan out of sale proc		16 May 2009	Justin Phelan	23548.67		GE Money	NA	763 Given		BS	
		ODW001/0001	Sean O'Dwyer		Discharge stamp duty on remo			Justin Phelan	15000.00		Revenue Com		764 Given			
		ODW001/0001	Sean O'Dwyer		Discharge Tax Liability for 2007			Justin Phelan	24000.00		Collector Gen		765 Given			
	1	OWE001/0001	Peter Owen	Work Injury	Return Mortgage Document to		22 Dec 2010	Brian Sweeney	0.00		AIB		0 Given		SK	
		OWE001/0001	Peter Owen	Work Injury	Discharge stamp duty on com		03 Dec 2010	Stephen Keogh	9500.00		Revenue Com		776 Given		SK	
		QU1003/0001	John Quigley		Return Insurance monies includ			Martina Winte	10525.00		Eagle Star		778 Given			
		TRA001/0001	Ken Traynor	Management		04 Oct 2011		Stephen Keogh	0.00		AIB		789 Given			
		ABB001/0001		Sale 45 Soms		19 Oct 2011	04 May 2011	Brian Sweeney	600000.00		First Active	Pre R.	795 Given		MW	78654FN
		BUT001/0002	Noel Butler		Title Deeds	30 Nov 2011	Contrady 2011	Brian Sweeney	200000.00		EBS Bray	Pre R.	826 Given			
		KEO003/0002	Sam Keogh	RTA	test	20 Oct 2011		Brian Sweeney	0.00		test		849 Given			
		BEC001/0001	Angela Beck	Sale of 56 Ch.		10 Nov 2010		Brian Sweeney	600000.00		First Active	Pre R.	889 Given			1234EN
	1	BAR001/0002	Tony Barry	Purchase 23 L		31 Jan 2012	31 Jan 2012	Justin Phelan	0.00		First Active		973 Given		MW	kicharge By
		BE5001/0001			Title Deeds	12 Jul 2011	2.1.1.2012	Brian Sweeney	670000.00		First Active	Pre R.	1203 Recei			
		A8A001/0001		Family Law	Title Documents	27 Jun 2014		Martina Winte	0.00		Peter D. Jone	Pre R.	1388 Recei.			
		TOB001/0001	Avril Tobin		Title Deeds	01 Dec 2011		Brian Sweeney	300000.00		Trustee Savin	Pre R.	1412 Given			1234/EN
	-	LAW001/0001	Liz Lawlor	Advice re inhe		02 Feb 2012		Brian Sweeney	300000.00		EBS Bray	Pre R.	1555 Given			
		BLO001/0004	Joe Bloggs		Title Deeds	14 Feb 2012		Martina Winte	0.00		Dun Laoghair	and the	1562 Given			
		CLI001/0001	Bill Clinton	Unfair dismiss		15 Mar 2012		Martina Winte	6750.00		National Irish		1609 Given			
Tasks		A88001/0001		Sale 45 Soms		27 Feb 2015		Brian Sweeney	450000.00		First Active pl	Dra D	2931 Given			
iearch/Open		DEA001/0002	James Deane	Sale 56 Green		21 Feb 2015		Brian Sweeney	350000.00		First Active pl		2932 Recei.			
and a second second			and a presente	and any distant		A		women arrenney		-	the sective pro-	and Photo	Read Planet			

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

Add Edit Dischar Underseings	ge													
arch/Open	Search												Standard View	Preview
tatters	Attn	Matter Ref	Client	Matter	Undertaking	Undertaking	Discharge Date	Authorised By	Value Type	For Who	Status	Action Given	Discharge Descripti	Description
Aattors		R4E001/0002	Tony Barry		First Active - Undertaking re Sa.,			Carol Nolan	245400.00 F	First Active	NA	721 Given		-
nt Matters		BIL001/0001	Noel Billing		VHI - Refund medical expenses.		21 Sep 2011	Justin Phelan	105000.00 F	VHI - Refund	NA	722 Given		Undertaking changed by BRIANS
ects		DEV001/0001	Noel Devlin		MBNA - repay credit card debt			Stephen Keogh	15124.26 F		NA	723 Given		Date: 10/03/2009
tiates		DOH001/0005			Employment contract held	17 Sep 2011		Martina Winte	0.00 D	Stone & Co r		724 Given		Type: Financial
nced Search		CAM001/0001	Tony & Marie	Sale 6 Brighto	NB - return title deeds if sale n	30 Jan 2010	30 Apr 2010	Carol Nolan	0.00 D	NIB Sale Proc.		725 Given		Given
voices		CAM001/0002			Discharge balance of purchase		16 Feb 2012	Justin Phelan	202000.00 F	ES8 Discharg	NA	728 Given		Authorised By: CN Carol Nolan Undertaking to: First Active plc(First
heques		CAM001/0001			Redeem Mortgage to BOI	08 Apr 2010	16 Feb 2012	Justin Phelan	238342.50 F		NA	729 Given		Active)
e Log		DEM001/0002			Pay Church & General - Insuran		03 Apr 2009	Brian Sweeney	25500.00 F	Church & Gen		730 Given		Details: First Active - Undertaking re Sale
Undertakings		FOX001/0001	Jennifer Fox		AIB personal loan	24 May 2010		Martina Winte	45000.00 F	AIB personal I		732 Given		of 17 Douglas Road Smithfield Dublin 1 -
g Room		PUR001/0001	Mick Purcell		To furnish orginal life policy do			Brian Sweeney	0.00 D	AIB		733 Given		redeem mortgage
ment Search		KEL001/0001	Mary Keller		Contact: €85,000 to be paid fro			Stephen Keogh	85000.00 F	AIB	NA	734 Given		Comment: First Active
late Library		LYN001/0001	Roger Lynch		Redeem credit card debit	15 Jan 2009	22 Mar 2009	Justin Phelan	7891.00 F	MBNA Credit		760 Given		Value: 245400
		LYN001/0001	Roger Lynch				22 Mar 2009	Justin Phelan	12134.67 F	Crumlin & Dis		761 Given		Status: NA Dealing Number: TB2/98011
		LVN001/0001	Roger Lynch		Pay loan and overdraft from sa 15 Jan 2009 22 Mar	22 Mar 2009	Justin Phelan	3852.65 F	AIB		762 Given		Dealing Number: 152/98011	
		LYN001/0001	Roger Lynch				16 May 2009	Justin Phelan	23548.67 F	GE Money	NA	763 Given		
		ODW001/0001	Sean O'Dwyer		Discharge stamp duty on remo		to may 2007			Revenue Com	1.0-1	764 Given		Undertaking Created:
		ODW001/0001	Sean O'Dwyer	Re-mortgage	Discharge Tax Liability for 2007					Collector Gen		765 Given		Date: 10/03/2009
		OWE001/0001	Peter Owen	Work Injury	Return Mortgage Document to		22 Dec 2010	Justin Phelan 15000.00 F Justin Phelan 24000.00 F 010 Brian Sweeney 0.00 D	0.00 D	AIB		0 Given		Type: Financial
		OWE001/0001	Peter Owen	Work Injury			03 Dec 2010	Stephen Keogh	9500.00 F	Revenue Com		776 Given		Given Authorised By: CN Carol Nolan
		QUI003/0001	John Quigley					Martina Winte	10525.00 F	Eagle Star		778 Given		Authorised By: CN Carol Nolan Undertaking to:
		TRA001/0001	Ken Traynor	Management		04 Oct 2011		Stephen Keogh	0.00 D	AIR		789 Given		Details: First Active - Undertaking re Sale
		AB8001/0001		Sale 45 Soms		19 Oct 2011	04 May 2011	Brian Sweeney	600000.00 D	First Active	Pre R_	795 Given		of 17 Douglas Road Smithfield Dublin 1 -
		BUT001/0002	Noel Butler	Lease Agree_		30 Nov 2011	ow may sorr	Brian Sweeney	200000.00 D	EBS Bray	Pre R_	826 Given		redeem mortgage
		KE0003/0002	Sam Keogh	RTA	test	20 Oct 2011		Brian Sweeney	0.00 D	test	rie Das	849 Given		Comment: Problem with title monies in
		BEC001/0001	Angela Beck	Sale of 56 Ch		10 Nov 2010		Brian Sweeney	600000.00 F	First Active	Pre R_	889 Given		client a/c
		BAR001/0002	Tony Barry	Purchase 23 L		31 Jan 2012	31 Jan 2012	Justin Phelan	0.00 D	First Active		973 Given		Value: 245400 Status: NA
		BES001/0001		Lease of Unit		12 Jul 2011		Brian Sweeney	670000.00 D	First Active	Pre R_	1203 Recei		Dealing Number: TB2/98011
		ABA001/0001	David Abraha		Title Documents	27 Jun 2014		Martina Winte	0.00 D		Pre R_	1388 Recei		
		TOB001/0001	Avril Tobin	Sale of The C		01 Dec 2011		Brian Sweeney	300000.00 F	Trustee Savin	Pre R_	1412 Given	×	
		LAW001/0001	Liz Lawfor	Advice re inhe		02 Feb 2012		Brian Sweeney	300000.00 D	EBS Bray	Pre R	1555 Given		
		BLO001/0004	Joe Bloggs		Title Deeds	14 Feb 2012		Martina Winte	0.00 D	Dun Laoghair		1562 Given		
		CLI001/0001	Bill Clinton	Unfair dismiss		15 Mar 2012		Martina Winte	6750.00 F	National Irish		1609 Given		
Tasks		AB8001/0001		Sale 45 Soms		27 Feb 2015		Brian Sweeney	450000.00 D		Pre R_	2931 Given		
Search/Open		DEA001/0002		Sale 56 Green		21 Feb 2015		Brian Sweeney	350000.00 D	First Active pl		2932 Recei		
Client/Case													×	
			Count: 39											

Attaching Undertaking Documents using the Undertakings Register

- 1. Go to Search Open and select Firm Undertakings.
- 2. Search for the required **Undertaking** and right click.

l	Attn	Matter Ref	Client		Matter		Undertaking		
·		FLY001/0001	Jack Flynn	0	Add		asdfasd		
				0	Edit				
				Q	Discharge				
				Ń	Add Document				
				8	Open Action				
				11	Go To Case Diary	,			

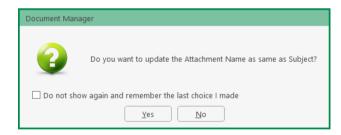
- 3. Select Add Document.
- 4. **Navigate** to the location of the document e.g. Scan Capture folder and select the document.
- 5. Highlight the **Document Class** and click **Select.**

· ^	• •	Include Reti	le
Search			
Class Code	Class Description	Retired	Τ
INS	Instruction Sheets	N	
LTR	Letters/Interparty Correspondance	N	
MED	Medical Reports	N	
MEM	Memo	N	
MOT	Motion papers	N	
MSG	Email Message	N	
NOT	Notes	N	
OPI	Opinions	N	1
PLE	Pleadings	N	
REA	Research	N	
REP	Reports	N	
REQ	Requisitions	N	
REV	Revenue Form	N	
SHA	Shareholders Agreement	N	
UTK	Undertaking	N	
WIL	Will	N	
<		>	1

- 6. The document is now visible in the Case Diary. Go to the Case Diary and locate the Undertaking.
- 7. If the document needs to be renamed go to the **Attachment** Section, select the document and right click.
- 8. Select Properties.

Home Case Report	Keyhouse Case Management (CVI-Caur Holen-1000/1000) (Quick Search (Ctrl + Q)	×
New Item • Print • Captu	Compute Action Start Timer Post Time Action		
Client/Case	Caste: [R:V001/0001 4] Jack Flynn	Tel: 01-569	7412
Case Diary	Sale of 10 Rose Lawn, Blanchardstown, Dublin 17	F/e: CN	
Document Manager	Search	Standard View	1
Surrent Client Details Current Case Details	C., A., P., D., A., Date Time Handler Synopsis	Action Co F	Pre
Extra Case Details	Image: Big 109 May 2016 15:11 CN Will of JV Flynn 5 May 2016	P ^	Preview
🙅 Associates	i 09 May 2016 15:08 CN Will of Jane Flynn dated 6 May 2016	P	
Critical Information	F 09 May 2016 15:06 CN Will of Jack Hynn dated 5 May 2016	P	
Know Your Client Linked Cases	09 May 2016 00:00 CN Accountable Trust Receipt	ADMAT 🖗	
	III II 06 May 2016 14:08 CN Salutation	G200 P	
A/c Ledger	29 Apr 2016 15:40 CN Forward funds o	ADMUD 🕞	
Time Ledger Debt Ledger	30 Mar 2016 10:21 CN Review File file for Details File Information	G16 P	
Reserve Ledger	OB Mar 2016 15:16 BS Ltr to Client	TDOC 🕞	
Undertakings	F US Mar 2010 12:15 BS Attidavit of Debt	TDOC P	
Strong Room	19 Feb 2016 15.41 AM Review File Document Date: 09 May 2016 V	G16 P	
strong Room	C # 23 Mar 2016 10:21 CN Letter to Client Document Class: Undertaking	G02 P G03 P	
	C I 23 Mar 2016 1021 CN Letter to Solicito Document Type: PDF		
	Image: Constraint of the second sec	G04 P G02 P	
		G27 P G02 P	
	G # 0.5 Heb 2016 15.58 CN Letter to Client G # 0.1 Heb 2016 15.59 CN Letter to Client	G02 P	
	C 25 M 2016 102 CN 2017 102 CN	G26 P	
	2 23 All 2010 1800 CM CON	G20 P	
	a 10 Jan 2010 1001 1001 CV Additional strength a 10 Jan 2015 1002 CN Letter to Dector ?	G08 P	
	Attachments events	Standard View 🔲 🐢	,
Tasks	Type Document Version Date Document Class		
Search/Open	1 9 May 2016 Undertaking		
Client/Case			
Time Costing			
costing		CN: Carol Nolan Monday 09 May 2016 15:	51

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



Undertaking Reports

Reports on Undertakings can be created based on a number of criteria. The reports are available as part of the System Reports but they can also be found in the Firm Undertakings on the Search/Open Screen. There are also 2 reports available in Undertakings on the Case Diary.

Create an Undertaking Report

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

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

int 👻 Add Edit Discharge	Undert	akings by Dept
Undertaking List Report	Enter	Report Criteria
Undertakings Authorised By	To Date	09 May 2016
2	Discharge Status	Not Discharged 🗸
Undertakings by Client	From Department (Blank for All)	~
Undertakings by Dept	To Department (Blank for All)	~
Undertakings by Dept by Work Type	New Page Per Department	
Undertakings by Dept by Work Type	Open or Closed Matters	Open 🗸
Undertakings by FE	Given or Recieved	All
Undertakings by Matter	From Date	10 May 2015
2 .	Financial or Documentation	All
Undertakings by Status	Commercial or Non-Commercial	All
Undertakings By Undertaking Date		
Undertakings By Undertaking To		Run
Undertakings By Work Type		

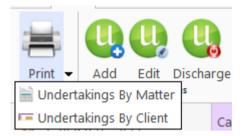
- 3. Click on the required report e.g. Undertakings by Dept. and the following report dialog box will appear.
- 4. **Complete** the required information. If you require all departments, leave the fields blank.
- 5. Click on **Run** and the report will generate.

)			_	View	Report						-	8 🔿
DOC PDF	s 💘 💓											
🙃 🤁 🖳 🔁 Type the tex	kt to find 🔹 🕞 🍋 1 /5 🔹 💡											
Group Tree X												
Undertakings By Dept					Soo Grabbi	t & Runne						
						rt By Departm To 09/05/2016	ent		Disch	105/2016:17:03 Dept From: : To: harge Status: All		
	l l l l l l l l l l l l l l l l l l l	Dept Matter Client Matter	Undertakin Date	9 Type	Auth.By	Dealing Number	Given Rec	Status		Matter Status: All Value		
	C B	COM Commercial BES001 Business Time Limited BS BES001/0001 Lease of Unit 33, Eastgate Aver	12/07/2011	Document For : First Active	BS	6788F		Pre Registration To: First Active plc	Not Discharged	670,000.00		
		BL0001 Joe Bloggs SK BL0001/0004 Commerical Work		Title Deeds Document For : Dun Laogh	MW aire Rathdown	County Council	Given	Te: Dun Laoghaire Ratho	Not Discharged	0.00		
		LAW001 Liz Lawlor		Title Deeds								
		BS LAW001/0001 Advice re Inheritance tax	02/02/2012	Document For : EBS Bray Tityle Deeds	BS		Given	Pre Registration To: Educational Building	Not Discharged Society	300,000.00		
		PUR001 Mick Purcell BS PUR001/0001 Lease renewal - rent review red		Document For : AIB	BS	uments to be received	Given	To: AIB	Not Discharged	0.00		
		BUT001 Noel Butler JP BUT001/0002 Lease Agreement - Unit 2, Gree		Document For : EBS Bray Title Deeds	BS	F567777	Given	Pre Registration To: <u>Educational Building</u>	Not Discharged Society	200,000.00		
	-			,	Reyflouse Legal IT S	secializate <u>www.keyflowze.ie</u>				Page 1 of 5		
t: 0							_		_			
ge 1 of 5 Main Report											I 🖂 🖸 100% → I	

- 6. Click on print or click on one of the following options available on the report toolbar:
 - Click on Doc lie to open a copy to Word
 - Click on PDF to open in Adobe.
 - Click on XLS to open a copy in Excel.

Printing from Undertakings

- 1. Click to Case Diary and select Undertakings from the Column on the left.
- 2. Click on the **Print** option on the Ribbon.



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

Enter	Report Criteria	
To Date	09 May 2016	15
Discharge Status	Not Discharged	~
From Client Code (Blank for All)	FLY001	~
New Page Per Client	V	
Open or Closed Matters	Open	~
Siven or Recieved	All	~
rom Date	10 May 2015	15
inancial or Documentation	All	~
Commercial or Non-Commercial	All	~
To Client Code (Blank for all)		~

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

Print -

🛋 Activity Report

🛎 Summary Report 🛎 Matter Label 🕨

🛎 Client Label 🔹 🕨

How to view Critical Information and Print Reports

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

Home Case Reports	Partners Phone Log Maintai	n Setup Hel	P	Ke	yhouse Case M	lanagement	(CN - Carol N	iolan - 00:02 / 07	(28.)	(a) Calck Search (Chf + C) - & X
Print • Start Timer Post Time Accounts										
Client/Case	Case: BLA001/0001		on T. Black Walkinstown Crossroads. G. Black							Tel: 01 476666 F/e: 85
Case Diary										
Document Manager & Current Client Details	No comment is available for thi	s matter.								
S Current Case Details	Show Alert									
Extra Case Details Associates	Account Summary				Action Summ	ary				
Critical Information	Debtors A/c	Days O/s	Start Date	08 May 2	010 File (Colour				
🗳 Know Your Client	Outlay A/c	3,336.61	4 Years, 8 Months and 12 0	Days O/s	Solicitor	Brian Swe	eney Statu	te Date 2	25 Mar 201	5
🙀 A/c Ledger	Outlay Budget	0.00		i l	Case Status		Who	Date	De	scription
Time Ledger Debt Ledger	Current Outstanding Fees	121.78			Last Action	_	N	14 Mar 21	_	dertaking Created: Date: 08 Jan 2016 Type: Documents Given Authorised By: CN Carol Nolan Undertaking to: DUB001(THE
Reserve Ledger	Client A/c	0.02			Last Milestone Action			14 1001 21		renaking created, bate, or sain 2010 type, bocaments over Paulionsed by, created renam oncertaking to, boboot(ring
Undertakings	Client Current	0.02					is	04 Mar 2	015 Pre	pare Papers for Counsel.
Strong Room	Client Deposit	0.00			Last Record T		ик	16 Jul 201		endance
_ 00 ong 10 on	Current Locked Up Value	8,531.73	Percentage Of Estimated Fee							
	Total Work in Progress	5,047.77		6.31%	Outstanding (ritical Date				
	Write Off Time	0.00		[Date	Who Sta	tus Descri	ption		
	Fees Issued To Date	60,635.00		75.79%	14 Mar 2016	CN [Critical	Date		
	Fees To Date + WIP	65,682.77		82.10%						
	Estimate Fees	80000.00	Section 68 Estimate given	6.31%	Undertakings					
	Draft Invoices	0.00			Description	Valu		Who	Given/R	received
	Last Bill Date	02 May 2012		l	provide proof	of ID 0.0	0 THE CITY	OF DUBLIN	Given	
	Expected Bill Date	~								
	Current Profit/Loss	54,487.23								
	Possible Value To The Client	0.00								
	Anti Money Laundering checked	Approve								
				Total Time						
	Time By F/e Stephen Keogh	Work in Progr 6:41		fotal Time 6:41		1 1	545.67			
Tasks	Brian Sweeney	5:25		7:53	-		,919.50			
Search/Open	Martina Winters	4:55		4:55	_		.032.60			
Client/Case	Carol Nolan	4:00		4:00	_	_	000.000			
Time Costing	Mark Kelly	1:00	-	1:00	-		150.00			v

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

For Activity Report: Click on Activity Report

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

- Summary Report:Click on Case Summary ReportThe current case code will appear amend if required.Then click Run.
- Print Labels: Click on Matter Label or Client Label as required

Other Case Diary Functions

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

- Chapter 6 for the Keyhouse Capture
- Chapter 7 for the template Library
- Chapter 8 for the Conflict Search
- Chapter 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: Using the Document Manager

Document Manager

Getting around Document Manager

Below is an image of the Document manager window.

Home Case Reports	Partner	s PhoneLog Mathitain Setup Help		Keyh	ouse Case Management	(CN + Carol Nolan -	00:00 / 00:00)				(Curick Search (Ctrl + Q)) - 0
New Item - Print Export	to PDF S	tart Timer Post Time Accounts	Case I	-	VS Word Worksha Compare	Column	Headin	ıgs			Preview Pane	;
Client/Case	Case: AE	AA001/0001	Search bo	x		7/) Standard V	fiew 💼		Tel: 01-29 F/e: CN
Securrent Client Details	Type	B Document Name	Diary Date Version	Date	Document Class	Source	From	To	Subject	Tra		
Current Case Details	• B	Letter reminding Lender to send Title	04 May 2016	1 04 May 2016	Correspondance	Case			Remind Lender to send Title	1	ABA001/0001/CN	N/GCU
Extra Case Details Associates	13	Letter to Solicitor re Pleading	04 May 2016	1 04 May 2016	Letters/Interparty Corr	. Case			Letter to Solicitor re Pleading		20002 00.000	
Critical Information		Letter from Accountant	19 May 2014	1 19 May 2014	Client Letters	Captured			Letter from Accountant		04 May 2016	
Know Your Client		Mobile Call to Brian Sweeney	01 May 2014	1 01 May 2014	General	Received E-m	keyhousedem	stephen@key	Mobile Call to Brian Sweeney			
A/c Ledger	F		01 May 2014	1 01 May 2014	General	Received E-m	brian@keyho	'keyhousede	Practice Management Review Agenda		Kilkenny	
Time Ledger	8	Navigation panel	01 May 2014	1 01 May 2014	General		1. alles	'keyhousede	Practice Management Review Agenda		5 Main Street	
Debt Ledger	R	ina rigación parter	01 May 2014	1 01 May 2014	Gen Doo	ument l	int	'keyhousede	Practice Management Review Agenda		Kilkenny	
Reserve Ledger		14101-Trends-Report-Final.docx	01 May 2014	1 01 May 2014		ument i	ISL		Financial Trends for the Economy		Co. Kilkenny	
Undertakings	10	image001	01 May 2014	1 2014	General	PRECEIVED E-DI-			Financial Trends for the Economy			
Strong Room	B	Financial Trends for the Economy	01 May 2 014	1 01 May 2014	General	Received E-m			Financial Trends for the Economy			
	E	Key Performance Indicators	27 Feb 2014	1 27 Feb 2014	General	Sent E-mail	brian@keyho	brian@keyho	Sample Report for Key Performance indicators		RE: Our Clients David Ab Premises: aerrgaert	orahams
	E	8 Sample Report for Key Performance Indicators	27 Feb 2014	1 27 Feb 2014	General	Sent E-mail	brian@keyho	brian@keyho_	Sample Report for Key Performance Indicators		Loan No. aertaer	
	F	Letter to Allsop & Browne	16 Jul 2013	1 16 Jul 2013	Correspondance	Case			Letter to Solicitor re title Letter to Allsop & Brow	-	1222-2422-0000-000-000-000-000-000-000-00	
		Accountants Letter	09 May 2013	1 07 May 2013	Letters/Interparty Corr	. Captured			Accountants Letter			

Window area	Description
Case Box	Input the case reference in this box or click the browse button and
	search for the required case.
Column 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
I 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 Brief Wizard.
	If there is an existing Brief, this button opens the existing Brief in the Brief Maintenance window
☑ Use Adobe PDF Viewer	Tick to use Adobe Reader to preview document.
	Compare two documents using Word's Document Compare feature
© → ← Workshare	Compare two documents using WorkShare (if installed)
Litéra	Compare two documents using Libéra

How to search the Document Manager

- 1. Open a case in the case diary.
- 2. Click Document Manager on the Navigation panel. All the attachments in the case will be listed.
- 3. Input the search terms in the Search box. The search results will update in real time, showing all

1							Keyhouse Case Management (CN - Carol Nolan - 00.01 / 07.29)			Quick Search (Ctrl + Q)	×
Home Case Reports	Phone	Log Ma	intain	Setup Help							
Vew Item • Actions Difference Capture		- 1	-								
Client/Case	Case: F	LY001/0001		< Þ.			Blanchardstown, Dublin 17			Tel: 01-56 F/e: CN	9 741
Document Manager	5	Search						Standard	View	Preview	
Current Client Details	Act.	. A P I	D A	. Date	Time	Handler	Synopsis	Action Co	o F	Letter to Client	
Extra Case Details	9	1		19 Feb 2016	15:41	CN	Review File	G16	P^	Preview Document	
Associates	•			12 Feb 2016	16:01	CN	Letter to Lending Institution	G04	P	FLY001/0001/CN/AM	
Critical Information			1	12 Feb 2016	15:44	CN	Letter to Client	G02	6	FL1001/0001/CN/AM	- î
Know Your Client	•		- 8	08 Feb 2016	15:41	CN	Letter to Solicitor	G03	P		
A/c Ledger	۲	25		05 Feb 2016	16:00	CN	Meeting	G27	P	12 February 2015	
Time Ledger	•		8	03 Feb 2016	15:38	CN	Letter to Client	G02	P		
Debt Ledger	۲		8	01 Feb 2016	15:50	CN	Letter to Client	G02	P	Jack Flynn	
Reserve Ledger Undertakings		ক		25 Jan 2016	16:00	CN	Court Date	G26	P	10 Rose Lawn	
Ondertakings	•			18 Jan 2016	16:01	CN	Attendance Sheet?	G20	P	Blanchardstown	
				30 Dec 2015	16:02	CN	Letter to Doctor ?	G08	P	Dublin 17	

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 📃
Scurrent Client Details	Type 🕖 Document Name Diary Date Version Date 🕶 Document Class Source From To	Subject
Current Case Details Other Case Details	▶ 📴 Attendance Log 14 Jul 2015 1 14 Jul 2015 Case	Attendance Sheet
Associates	Image: Matter dance for Introductory Meeting_2634 13 Jul 2015 1 06 Jul 2015 General Sent E-mail training@keyh Brenda Hartley	
Critican formation	Attendance for introductory Meeting D6 Jul 2015 1 O6 Jul 2015 Instruction Sheets Case	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**.

		Outstanding date	to prop peak												
		Outstanding debt	to PISB Bank.												
	Standard View														
Туре	0	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					
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					
P		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.					
1	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 Attachmer					
e		Letter to Lending Institution confirming appoint	06 Jul 2015	3	13 Jul 2015	Letters/Interparty Corr	Case			Letter to Lending Institution confir					
1		Conflict Search_2639	13 Jul 2015	1	06 Jul 2015	General	Sent E-mail	training@keyh	Brenda Hartley	Outgoing Email.					
		Attendance for Introductory Meeting 2634	13 Jul 2015	1	06 Jul 2015	General	Sent E-mail	training@kevh	Brenda Hartley	Outgoing Email with an Attachmer					

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

How to Filter Columns

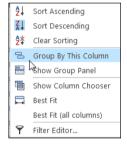
- 1. Move your cursor to the column heading required, so that the *filter pin* appears.
- 2. Click the filter pin and select the required filter from the drop-down menu.

5	Sear	ch	😂 🗌 Search text										
	Туре	V	Document Name	Diary Date 🔻	Version	Date	Document Class		Source	From	1	То	Subj
	X		Expenses Claim Form 2015 from 1st July2015	16 Jul 2015	1	30 Jun 2015	General	(Blanks)			keyh	training TT. tr	Test
	2	0	Test Attachment	16 Jul 2015	1	16 Jul 2015	General		(Non blanks) Client Letters			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					Atte
	P		Vendor Instruction Sheet	14 Jul 2015	1	14 Jul 2015	General		ion Sheets			Crea	
	P		Document2_2661_2662	13 Jul 2015	1	13 Jul 2015	General	Letters/Interparty Correspondance					Doci
	6		Conflict Search_2639	13 Jul 2015	1	06 Jul 2015	General	Memo Pleadin	as		keyh	Brenda Hartley	Outo
	2	0	Outgoing Email.	13 Jul 2015	1	13 Jul 2015	General	Reports	2		keyh	Brenda Hartley	Outo
	P		Attendance for Introductory Meeting_2634	13 Jul 2015	1	06 Jul 2015	General					Brenda Hartley	Outo
	2	0	Outgoing Email with an Attachment	13 Jul 2015	1	13 Jul 2015	General		Sent E-mail	training@	0keyh	Brenda Hartley	Outo
			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 Sheets		Case				Initia
	P		Letter to Lending Institution confirming appoint	06 Jul 2015	3	13 Jul 2015	Letters/Interpart	y Corr	Case				Lette
	P		Letter to Lending Institution confirmating appoin	06 Jul 2015	1	06 Jul 2015	Letters/Interpart	y 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.



Туре	Document Name	Versi
→ Docu	ment Class: Attendance Sheet	
► Docu	ment 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**.

✓ Source: Case														
P	Letter to Client	1	20 Apr 2010	29 Jan 2011			Letter to Client re advice							
P	Letter to Solicitor	1	24 Apr 2010	29 Jan 2011			Letter to Land Registry							
	Letter to Solicitor	1	10 Jun 2010	29 Jan 2011			Letter to Solicitor							
	Letter to insurance company	1	08 Oct 2014	23 Nov 2014			Letter to insurance company							
	Letter to Barrister	1	13 Nov 2014	23 Nov 2014			Letter to Barrister							
	Letter to Doctor	1	23 Nov 2014	01 Oct 2014			Letter to Doctor							
∡ Sourc	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.

₽Ļ	Sort Ascending		5	Search		Sear	rch text
Z↓	Sort Descending			Document Clas		Full Expand]
₽¥	Clear Sorting			Type 🗐		Full Collapse	
		-	►	Docume	4 ↓	Sort Ascending	
8	Group By This Column			Docume	¥↓	Sort Descending	
	Show Group Panel			Docume	A¥ Z¥	Clear Sorting	
		-		Docume	Cex -	Ungroup	
	Show Column Chooser			Docume	-	Hide Group Panel	spondance
	Best Fit			Docume		Show Column Chooser	
				Docume		Best Fit (all columns)	
	Best Fit (all columns)			Docume		Group Summary Editor	-
Ŷ	Filter Editor				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	2

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

Document Folders

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

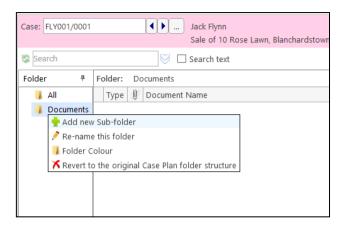
1. Go to the **Document Manager**.

Case:	FLYO	01/000	Jack Flynn Sale of 10 Rose Lawn,	Blanchardstown	. Dublin 17						
🔄 Se	arch		Search text								Standard View 🖙
Folder	Folde	r: A									
Fol	Тур	e 🖉	Document Name	Diary Date	Version	Date 🔻	Document Class	Source	From	То	Subject
_	F 1	1	Section 68 Letter	30 Dec 2015	1	24 May 2016	Correspondance	Case			Section 68 Letter
			Ltr to Client re serches	30 Mar 2016	1	11 May 2016	Letters/Interparty Corr	Capture			Ltr to Client re serches
		1	Letter to Doctor	10 May 2016	1	10 May 2016	Letters/Interparty Corr	Case			Letter to Doctor
	ſ	•	Will of Jack Flynn dated 5 May 2016	30 May 2016	1	09 May 2016	Will	Capture			Will of Jack Flynn dated 5 May 2016
		•	Will of JV Flynn 5 May 2016	09 May 2016	1	09 May 2016	Will	Capture			Will of JV Flynn 5 May 2016
	6	•	Will of Jane Flynn dated 6 May 2016	09 May 2016	1	09 May 2016	Will	Capture			Will of Jane Flynn dated 6 May 2016
	6	ł	Undertaking to forward funds	29 Apr 2016	1	09 May 2016	Undertaking	Capture			Forward funds on completion of sale.
	6		Letter to Solicitor	23 Mar 2016	1	23 Mar 2016	Letters/Interparty Corr	Case			Letter to Solicitor
			Letter to Client	23 Mar 2016	1	23 Mar 2016	Client Letters	Case			Letter to Client
	E.		Ltr to Client	08 Mar 2016	1	08 Mar 2016	Letters/Interparty Corr	Capture			Ltr to Client
	1	l,	Affidavit of Debt DMD	08 Mar 2016	1	08 Mar 2016	Documents	Capture			Affidavit of Debt DMD
	1	1	Letter to Lending Institution	12 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr	Case			Letter to Lending Institution
	1	1	Letter to Client	12 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client
	ſ	1	Letter to Solicitor	08 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr	Case			Letter to Solicitor
	1	1	Letter to Client	03 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client
	E		Letter to Client	01 Feb 2016	1	12 Feb 2016	Client Letters	Case			Letter to Client

2. Click on Folder and pin into position.

Case: FLY001/0001			Jack Flynn Sale of 10 Rose Lawn, Blanchardstow	n, Dublin 17						
Search			😔 🔲 Search text							
Folder 4	Fol	der: A	II							
📕 All	1	Type 🖞	Document Name	Diary Date	Version	Date 💌	Document Class	Source	From	То
📕 Documents	F	12	Section 68 Letter	30 Dec 2015	1	24 May 2016	Correspondance	Case		
			Ltr to Client re serches	30 Mar 2016	1	11 May 2016	Letters/Interparty Corr	Capture		
		1	Letter to Doctor	10 May 2016	1	10 May 2016	Letters/Interparty Corr	Case		
		1	Will of Jack Flynn dated 5 May 2016	30 May 2016	1	09 May 2016	Will	Capture		
		1	Will of JV Flynn 5 May 2016	09 May 2016	1	09 May 2016	Will	Capture		
		1	Will of Jane Flynn dated 6 May 2016	09 May 2016	1	09 May 2016	Will	Capture		
		2	Undertaking to forward funds	29 Apr 2016	1	09 May 2016	Undertaking	Capture		
		1	Letter to Solicitor	23 Mar 2016	1	23 Mar 2016	Letters/Interparty Corr	Case		
		1	Letter to Client	23 Mar 2016	1	23 Mar 2016	Client Letters	Case		
			Ltr to Client	08 Mar 2016	1	08 Mar 2016	Letters/Interparty Corr	Capture		
		1	Affidavit of Debt DMD	08 Mar 2016	1	08 Mar 2016	Documents	Capture		
		1	Letter to Lending Institution	12 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr	Case		
		8	Letter to Client	12 Feb 2016	1	12 Feb 2016	Client Letters	Case		
		6	Letter to Solicitor	08 Feb 2016	1	12 Feb 2016	Letters/Interparty Corr	Case		
		1	Letter to Client	03 Feb 2016	1	12 Feb 2016	Client Letters	Case		
			Letter to Client	01 Feb 2016	1	12 Feb 2016	Client Letters	Case		

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



4. Enter the name of the folder and click OK

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

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

Moving, Linking & Copying Documents in the Folder Structure

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

Alternatively

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

-									ale of 10 Rose Lawn, Blanchardstown, Dubl	in 17		
5	Sea	arch		_	_		96	Se 🗌 Se	earch text			
Fol	dei	r		4	Fo	lder:	Do	cuments	>>> Report			
	ł	All				Туре	P	Docume	ent Name	Diary Date	Version	Date
4	k	Do	cuments		F	6		Underta	aking to forward funds	29 Apr 2016		09 May 201
	4	1	Agreements			2			V Flynn 5 May 2016	09 May 2016	1	09 May 201
			🍋 Move d						ane Flynn dated 6 May 2016	09 May 2016	1	09 May 201
			Copy de Link do						ack Flynn dated 5 May 2016	30 May 2016	1	09 May 201
				Cuilli	ent	13 10 11	15 10	Letter to	Solicitor	23 Mar 2016	1	23 Mar 201
						R		Letter to	o Client	23 Mar 2016	1	23 Mar 201
								Ltr to C	lient	08 Mar 2016	1	08 Mar 201

- 2. To **copy** or **link** a document into more than one folder, move it to the first folder as per Point 1.
- 3. Click on the Folder and Right Click the document to be copied.
- 4. **Drag** to the second folder.
- 5. Select Copy documents to this folder or Link documents to this folder.

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

Chapter 6: The Task Manager

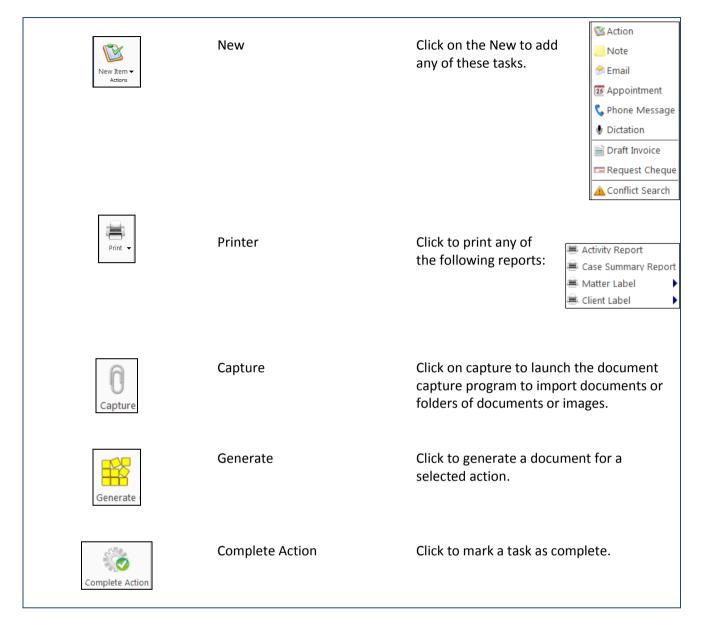
When you log in to the new version of the Keyhouse Desktop you can choose to login directly to the Task Manager (see the chapter 1 for further information). The primary function of the Task Manager is to act as a To-Do list displaying all tasks outstanding. It defaults to overdue tasks but you can navigate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

ctions	Generate C Documer	nts		ſ	Searc	h B	าx]				
Idsks	Handler C	arol Nol	an 🔽 🛛 o	-)		Standard Vie		Preview Letter to Lending Institution
ty tasks eam tasks	Jearen		Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action	Diary Date		Letter to Lending Institution
		: 👞	04 Nov 2014	19:31	GLE001/0001	CN	сом	CN	Charlie Gleeson Lease of South West Georges Street	Review File	04 Nov 2	P^	
ay's tasks lext week's tasks lext month's tasks	B	18-	04 Nov 2014	19:09	GLE001/0001	CN	сом	CN	Charlie Gleeson Lease of South West Georges Street	Letter to Solicitor	04 Nov 2	P	
verdue tasks	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
st month's tasks I 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
y Overview	Ħ		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
	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
		\neg	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	NS		04 Nov 2014	17:24	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Letter to Client ?	04 Nov 2	P	Document
	B		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
	8		04 Nov 2014	17:19	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Task	list		
	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		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		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		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		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		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		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		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		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	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	0	

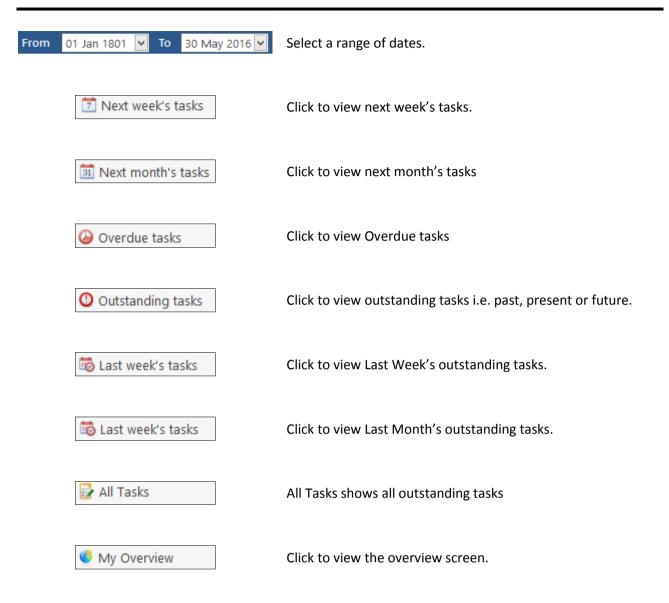
The Home Tab in Task Manager



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.



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.

		Standard View
	View	2
Standard View		
Critical Dates		
Delegeted Tasks		
Dictation		
High Priority Items		
Milestone/HighLighted Items		
Phone Messages		
Scanned Post		
Statute Dates		

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.

S.	Review	8

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

На	Handler Carol Nolan 🔽 OutStanding Only													
5	Review Standard View													
					Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action	Diary Date	
Þ			2	P	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	COM	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	COM	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D	Review 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
			1		07 May 2014	11:49	KEL002/0001	CN	сом	CN	Sarah Kelly Purchase of Property	<mark>Review</mark> File	07 May 2014	P
	₿				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
			1		26 Dec 2013	12:04	KEL002/0001	CN	сом	CN	Sarah Kelly Purchase of Property	Review File	26 Dec 2013	P
	~	\sim	يلمر	~~~	19 Dec 2013	14:52	Allonon	h	~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Melinda FitzGerald	Bari	hardradd 3 mart -	Dun

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

How to Sort Column Headings in the Task Manager

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

How to Filter the Task Manager

- 1. Move your mouse to the required column heading.
- 2. To view a list of filter categories Case Code[®] Click on the pin and select the required category. See the following example



How to Group by a column heading in the Task Manager

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

Ha	indle	er <mark>C</mark> a	rol	No	lan 🔽 🗹 Ou	ıtStandir	na Onlv				
ŝ	Sea	arch]					
					Date	Time	Case Code		Handler Team From	Client/Case(Matter)	1
Þ		1		8	04 Nov 2014	19:31	GLE001/00	2↓ Z↓	Sort Ascending Sort Descending	Charlie Gleeson Lease of South West Georges Str	1
	B				04 Nov 2014	19:09	GLE001/00	2¥	Clear Sorting Group By This Column	Charlie Gleeson Lease of South West Georges Str	
	B				04 Nov 2014	19:07	ABA001/00		Show Group Panel	David Abrahams Sale of 22 O'Connell Street, Dubli	
		1			04 Nov 2014	18:16	BLA001/00		Show Column Chooser Best Fit	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D	1
		1			04 Nov 2014	18:15	BLA001/00	Q	Best Fit (all columns)	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D	1
	1	\nearrow	~~	مىر	04 Nov 2014	17:26	BLA001/00	1	Filter Editor	Gordon T. Black Sale of 2 Trim Chang Broosan Dr.	

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

		Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action			
·	Case Code: /	AAA001/0001										
	► Case Code: AAA001/0003											
	✓ Case Code: ABA001/0001											
	ন্দ	25 Jun 2014	12:51	ABA001/0001	CN	сом	CN	David Abrahams Family Law	Court Date			
	ন্দ	07 May 2014	08:36	ABA001/0001	CN	сом	CN	David Abrahams Family Law	Court Date			

4. To return to the standard view click on the view tool located on the search bar. The following menu will appear 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 to complete an action with today's date. Select Complete Hold Date where you want to complete the action for the day it was generated.

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.



Generate Documents

H,



v Dictation	
	y Dictation

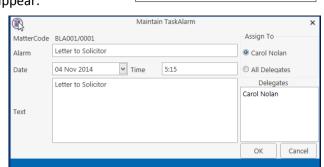


Alarm Action

OutStanding Only

How to Alarm an Action/Case

- 1. **Right click** on the task you want to alarm and select **Alarm Action** from the pop-up menu. The following screen will appear.
- 2. Using the drop down arrow set a **Date**
- 3. Input a Time for the alarm.
- 4. Assign it to yourself or all delegates.
- 5. Click **OK**.



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

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

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

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.

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.

8

Tag All

UnTag All

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

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

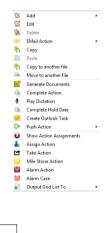
- 3. Right click again in the task list to bring up the menu again.
- 4. Click on the required function e.g. Complete Action.

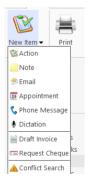
How to Add a New Item

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

G	Push Action 🛛 🔓	Þ		To date
N	Create Outlook Task		7	Plus 7 days
N	Show Assignments		14	Plus 14 days
\$	Assign Action		31	Plus 31 days







	Change Action (3	087)		- ×
Action				
🛱 Generate Document 🛛 🖉 Post Time 📒 Note	🚦 High 🖆 Take Action	隧 Generate 🕻	🖄 Save	
🚵 Open Attachment 🛛 🖋 Complete 🔶 Email	Normal 🕹 Assign Action			
🖢 Play Dictation 🛛 🚔 Print 🔶 Email (Template)	- Low			
Default Actions	Priority Assignment	SDLT		
General Properties Attachment/Documents Action	Assignments Other Notes			
Case ABA001/0001 Family La	W			
Action Code G03 Letter to 5	Solicitor ?			
	04 May 2016			
Subject Letter to Solicitor re Pleading				
General Email Appointment				
Fe/Handler Carol Nolan	v			
Team Commercial				
Connercial				
Letter to Solicitor re Pleading				
				Ok Cancel

- 3. Enter the following details:
 - **Case** The current case code will appear; to select a different case, click the **button** to see the matter list. Select the required case.

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

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

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

Subject Input a subject

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

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

Description Input a description in the box provided.

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

How to Edit a Task

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

							Add Action			- ×
Action	n									
🔂 Gen	nerate D	ocument	🕜 Post Time	🦲 Note		🚦 High	🖆 Take Action	隧 Generate	隧 Save	
철 Ope	en Atta	hment	🖋 Complete	😒 Email		Normal	assign Action			
🍨 Play	/ Dictati	on	🛎 Print	⋟ Email (Te	emplate)	棏 Low				
		D	efault Actions			Priority	Assignment	SDLT		
Gene	eral P	roperties	Attachment/	/Documents	Action	Assignments	Other Notes			
Ca	se	ABAO	01/0001	Fa	amily Law	/				
Act	tion Co	de G03			etter to S	olicitor ?				
Da	te	03 No	v 2015		ue Date	03 Nov 2015	; v			
Sul	bject	Letter	to Solicitor ?							
	General		Appointment	+						
				•						
	e/Hand		ol Nolan			~				
1	Feam	Co	nmercial			~				
Le	etter to	Solicitor	•							
										Ok Cancel

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

How to Delete Tasks

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

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

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

Note If you are assigned a task, generate and complete the task as normal. For further details see Chapter 4: Case Diary - Working with Tasks - Assigning Tasks to another User (p.54).

Generate Document 🛛 😰 Post Time 📒 Note

eneral Properties Attachment/Docu

Carol Nolan(CN)

Open Attachment 🛛 🖌 Complete 🔶 Email ≔ Print

ult Actions

Created

🗢 Email (Temp

Carol Nolan(CN)

High 🖪 Take Action

å, D

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

ents Ot

Date

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	Resou	irces					
Code Name Number of Due Tasks Team ADM Admin LIT AM Anne Mellon 5 COM BS Brian Sweeney 8 COM LIT Commercial COM LIT MW Martina Winters 1 LIT	Date	09 Nov 20	014	✓ Time :	13:05		
Code Name Due Tasks Team ADM Admin LIT AM Anne Mellon 5 COM BS Brian Sweeney 8 COM COM COM COM COM LIT Litigation LIT MW Martina Winters 1 LIT	Sea	arch					
AM Anne Mellon 5 COM BS Brian Sweeney 8 COM COM Commercial COM COM LIT Litigation LIT LIT MW Martina Winters 1 LIT		Code	Name			Team	
BS Brian Sweeney 8 COM COM Commercial COM COM LIT Litigation LIT LIT MW Martina Winters 1 LIT	۱.	ADM	Admin			LIT	
Image: Comparison of the commercial Commercial COM Image: Comparison of the commercial LIT LIT Image: Comparison of the commercial LIT LIT Image: Comparison of the commercial LIT LIT		AM	Anne Mellon		5	COM	
IT Litigation LIT MW Martina Winters 1		BS	Brian Sweeney		8	COM	
MW Martina Winters 1 LIT		COM	Commercial			COM	
		LIT	Litigation			LIT	
SK Stephen Keogh 2 COM		MW	Martina Winters		1	LIT	
		SK	Stephen Keogh		2	COM	
R. C.			Stephen Keogh		2	СОМ	

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
--	------	--------

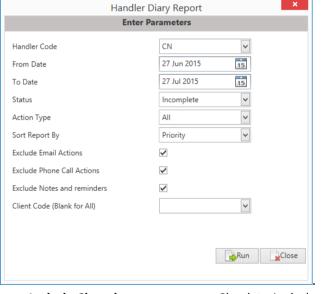
Ca	arol Nolan	Y OutStanding Only	,
	Code	Name	
	ADM	Admin	^
	AM	Anne Mellon	
	BS	Brian Sweeney	
Þ	CN	Carol Nolan	
	COM Commercial		
	LIT	Litigation	
	MW	Martina Winters	
	SK	Stephen Keogh	

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 fieldExclude emails:Check to exclude emailsExclude phone calls:Check to exclude phone callsExclude 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	▼ Li≉ 📲 🛓			and the second sec
					- 0
		Soo Grabbit	t & Run	ine	
		Handle	r Dia	v	Data Date: 09/11/2014:15:43
					From Date:02/03/2001 ToDate:09/11/2014 Status: Outstanding
		Carol	Nolan		Action Type: All
Matter	Date Time	Client Name	From	Diary Code	Diana Dagariatian
Action Id	Time	Description	Status	Item Type	Diary Description
High Priority FIT002/0001	10/12/2012	Melinda FitzGerald	CN	G16	Review File
1903	14:53:57	Sale of lands in wicklow	NA	Action	I CEVIEW I IIC
Not Applicable		Sale of failes in wicklow	19/5	Action	
KEL002/0001	26/12/2013	Sarah Kelly	CN	G16	Review File
1865	12:04:37	Purchase of Property	NA	Action	
Not Applicable				/ 00011	
KEL002/0001	07/05/2014	Sarah Kelly	CN	G16	Review File
1861	11:49:29	Purchase of Property	NA	Action	
Not Applicable				/ 10/10/1	
BLA001/0001	28/05/2014	Gordon T. Black	CN	G16	Review all contracts
1817	08:36:03	RTA Walkinstown Crossroads, G. Black	NA	Action	
Not Applicable				10001	
BLA001/0001	04/06/2014	Gordon T. Black	CN	G16	incoming copies doc
1837	17:12:35	RTA Walkinstown Crossroads, G. Black	NA	Action	incoming copies des
Not Applicable				100001	
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	
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		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 Not Applicable	18:16:39	Sale of 2 Trinity Close, Rathgar, Dublin 6	NA	Action	

 Word;

 Mode; or

 XLS

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 folde				
🔆 Favorites 📩	Name	Date modified	Туре	Size
📃 Desktop	鷆 keyhouse	03/11/2014 16:21	File folder	
🐌 Downloads	퉬 khframework	22/10/2014 10:59	File folder	
📃 Recent Places	퉬 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				
🜏 Homegroup				
🖳 Computer		23		
🏭 Local Disk (C:)				
🚽 Keyhouse (\\helli				
🖬 Network 👻				
File name:				
Save as type: Excel	File (* vlsv)			

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

🔊 Export To 🔹 🕨	6	PDF
S.	B	Excel
	E	Text
	e	Rich Text

Chapter 7: 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. (See subsequent pages for more detailed explanations).

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

General Tab

Home Case Reports	s Partners Phone Log Maintain Setup	Help		Keyhouse Case Manag	ement (CN - Carol N	olan - 00:10 / 07:20)				(Quick Search (C	(trl + Q)	- 8
t Timer Post Time													
Client/Case Case Diary		David Abrahams Family Law										Tel: F/e:	01-29 JP
ocument Manager	General Anti Money Laundering Financi	al Client Records Other Detai	ils Activity Client	t Contacts									
urrent Client Details urrent Case Details	No. of open matters 2	Last Client Activity Date 04 M	(iii)	Inser	Contact Category		×						
dra Case Details ssociates ritical Information	No. of open matters this year 0 Last Matter Created 25 Apr 2012	ABA001/0002 HIPS Negligence - October 2	Client Name	David Abrahams	Date	Please select date	~						
ow Your Client			Category Type *	Select category type	Category *	Select category type	v						
/c Ledger me Ledger ebt Ledger	Client Category Profile Search		Extra Information									Standard	View
serve Ledger	Category Type Description	Category Description						Field Value 5	Field Value 6	Field Value 7	Field Value 8	Field Value 9	
dertakings	Mailing List	Private Clients List											
rong Room	Mailing List Business Source	XMAS Cards News Letter					_						
							Cancel						
Tasks Search/Open Client/Case Time Costing	-						_				In	sert Change	De

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

- 2. Enter the Date, Category Type and Category and any additional information.
- 3. Click OK.
- 4. The new Category will appear in the list.

Anti-Money Laundering

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

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

These categories are in line with Law Society Guidelines.

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

Document can 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 currently stored outside of Keyhouse, right click in the **white area** and select Add.

(ii)				Keyhouse Case Mana	agement (CN - Carol Nolan - 00:10 / 07:20)		🔍 Quick Search (Ctrl + Q) 🛛 🗕 🗗 🗙
Home Case Reports	Partners Pho	one Log Maintain Setup He	P				
Start Timer Post Time Accounts							
Client/Case	Case: ABA001/0	001 A David Fami	i Abrahams y Law				Tel: 01-290222 F/e: JP
III Case Diary	General Anti	Money Laundering Financial C	lient Records Other Details A	ctivity Client Contacts			
& Current Client Details	Туре	Standard Due Diligence		Status In Progre	55	Last Instruction Recieved 12 Feb 2016 15:28:00	
Extra Case Details Associates Critical Information	Client Type	Residential Private Individual		Y Introduction By Face to fa	ce meeting	 ✓ Approve 	
A Know Your Client	AML Reco	rds					
🗃 A/c Ledger 😺 Time Ledger	Search						
Debt Ledger	Туре	Proof	Date Entered	Input By	Matter Code		^
Reserve Ledger Undertakings			Add Edit	Photo Id Non Photo Id			
E Strong Room			Delete				
	~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	man				

- 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.

		Op	en File					×
🛞 🍥 👻 🕆 퉬 🕨 This PC	▹ Documents	<ul> <li>Scan Folder</li> </ul>			✓ 🖒 Sear	ch Scan Folder		P
Organise 👻 New folder						•		0
🔆 Favourites	^	Name	Da	te modified	Туре	Size		
Desktop		🔁 Electrical Bill for David Abraha	ms.pdf 19	/05/2014 17:30	Adobe Acrobat D	659 KB		
i Downloads 🔤 Recent places								
🝓 Homegroup								
🜉 This PC								
🏴 admin (keytrain)								
📔 Desktop								
Documents								
Downloads								
Music								
Pictures								
🗎 Videos								
Windows (C:)	~							
	a contra a service	<b>.</b>				C1 (200)		
File <u>n</u> ame:	Electrical Bill for	David Abrahams.pdf			✓ AII	files (*.*)		~
						<u>O</u> pen	Cancel	

## Select the **type** of ID supplied

Home Case Reports	Partners Pho	one Log Maintain Setup H	lelp	Keyhouse	Case Management (CN - Carol Nolan - 00:10 / 07:20)		Quick Search (Ctrl + Q)
art Timer Post Time							
Client/Case Case Diary Document Manager	Case: ABA001/0 General Anti	Far	vid Abrahams nily Law Client Records Other Details Act	ivity Client Contacts			Tel: 01-2902 F/e: JP
Current Client Details	Туре	Standard Due Diligence		✓ Status	In Progress	Last Instruction Recieved 12 Feb 2016 15:28:00	
Extra Case Details	Client Type	Residential Private Individual		<ul> <li>Introduction By</li> </ul>	Face to face meeting	V Approve	
Critical Information Know Your Client	AML Reco	rds					
A/c Ledger	Search						
Time Ledger Debt Ledger	Туре	Proof	Date Entered	Input By	Matter Code		
					D Code      Decorption     Orscription     Orscriptin     Orscriptin     Orscriptin     Orscriptin     Or	а	
					Documentation/cards issued by the Reve		
Tasks							
Search/Open Client/Case							
cilent/case							

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

Home Case Reports	Partners Ph	hone Log	Maintain Se	tup Help		Keyhous	e Case Management	(CN - Carol Nolan - 00:10 / 07:20)			Quick Search (Ctrl + Q		- 8 ×
Start Timer Post Time													
Client/Case 🖩 Case Diary	Case: ABA001/	/0001		David A Family L									I: 01-2902222 : JP
Case Diary Ocument Manager	General Am	ti Money	Laundering Fina	ancial Clier	nt Records	Other Details Activity Client Contacts							
Securrent Client Details Current Case Details	Туре	Stand	ard Due Diligence			✓ Status	In Progress		V La	st Instruction Recieved 12 Feb 2016 15:28:00			
🎒 Extra Case Details	Client Type		ential Private Indiv				Face to face meeting			Approve			
<ul> <li>Associates</li> <li>Critical Information</li> <li>Know Your Client</li> </ul>	AML Rec		encial Private indiv	riddai		- Introduction by	y Pace to face meeting	ng		Approve			
A/c Ledger	Search												
🗃 Time Ledger	Type		Proof		Date Enter	ed Input By		Matter Code					
Debt Ledger Reserve Ledger	Non Phot	to ID	Utility bills	(including t.	. 23 May 20	16 CN		ABA001/0001					^
Undertakings     Strong Room													
Home Case Reports	Partners Ph	hone Log	Maintain Se	tup Help		Keyhous	e Case Management	(CN - Carol Nolan - 00.10 / 07.20 )			Quick Search (Ctrl + Q		- & ×
New Item • Print • Captur	e Generate Com	٥	on Start Timer Po	ost Time									
Actions	Case: ABA001/	/0001	Account	David A	brahams							Tel	I: 01-2902222
Case Diary				Family L									: BS
Document Manager	WARNING : Inv	voices out	standing over 1 Y	ears 11 Mor	nths 4 Days .							Ignore	Show me
Scurrent Client Details Current Case Details	Search	h									Stand	lard View	
😂 Extra Case Details	A. C. A. F	P D A	Date	Time	Handler	Synopsis					At	tion Co	
Associates Critical Information	8		23 May 2016	15:32	CN								P ^ W
Know Your Client Linked Cases			23 May 2016 04 May 2016	15:31 16:40	CN CN	Draft Bill Draft Bill No: 274						801	99
	=		04 May 2016	14:59	CN	Letter to Solicitor re Pleading					GC		P
A/c Ledger Time Ledger	<b>15</b> 🙂		27 Jun 2014	11:19	MW	Undertaking To AIB Longford					AE	DMUD	P
🗃 Debt Ledger	< 0		23 May 2016	15:33	CN	Utility bills (including those printed from	n the internet)						•
Reserve Ledger Undertakings	S S		04 May 2016 19 Jun 2014	15:53	CN BS	Remind Lender to send Title Invoice No:230						5L04 801	9
	s		19 May 2014	16:32	BS	Letter from Accountant					G2		9
Strong Room	6		01 May 2014	23:54	BS	Invoice No:229						801	P
	🍯 🗢	1	01 May 2014	22:29	BS	Email Fromskeyhousedemo@gmail.com	- Mobile Call to Brian	n Sweeney			EN	IN	P
	S 🗢		01 May 2014	12:30	BS	Email From:brian@keyhouse.ie - Practic		w Agenda			EN		P
	S =	1	01 May 2014	00:00	BS	Email To: • Financial Trends for the Eco	nomy				EN		9
	2 D © 0		27 Feb 2014	09:01	BS	David Abrahams		and a second second second second			PH		9
	S 2		27 Feb 2014 16 Jul 2013	07:08	BS BS	Email To:brian@keyhousedemo.ie - San Letter to Solicitor re title Letter to Allso		errormance indicators			EN		P
	0		09 May 2013	08:47	BS	Accountants Letter	p of allowing				G1		8
	5 5		17 Apr 2013	11:24	BS	Brian							P
	۵ ک	1	17 Apr 2013	10:27	BS	Email To: - Copy Land Folio					EN	IIV	P
	2 🖸		21 Mar 2013	08:43	BS	David					Pb	10	P
	S (0)	1	12 Feb 2013	22:29	BS	Innovation Ad					GI	13	P,
	Attachr	ments s	earch			and the second					Standa	rd View	
		Docume							Version Date	Document Class			
Tasks		Electricit							1 23 May 201	6 General			^
Search/Open													
Client/Case													

# Adding Existing Documents to AML Screen

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

1							Keyhouse Case Management (CN - Guol Nolar - 0000 / 0730)	Quick Search (Ctrl + Q)	>
Home Case Repor	rts Partne	rs Phone	Log	Maintain Set	up Help				
witten • Print • Capt	ture Genera	14		on Start Timer Po	ost Time				
Actions		cuments		Account					
Client/Case	Case: 1	rego01/0001		41	Peter Teg	19			I: 01-56987
Case Diary					RTA on N	44 at Lucan		F/e:	e: CN
Document Manager	WARNE							Ignore	Show m
Current Client Details			_		1				_
S Current Case Details	8	Search						Standard View	*
Extra Case Details	Ad C.	A P D	A.	Date	Time	Handler	Synopsis	Action Co	F
Associates	8	<b>9</b> 1		21 Jan 2018	12:05	CN	Statute of Limitations Date =31 Jan 2018	ADMSD	P ^
		01	1	09 Aug 2016	16:30	CN	Forward Funds	ADMUD	P
		0		11 Mar 2016	12:42	CN	Critical Date - Settlement conference	G23	P
🛓 Know Your Client				09 Mar 2016	10:07	CN	Letter to Client	G02	P
Know Your Client	<b>H</b>								0
Know Your Client A/c Ledger	8			09 Mar 2016	10:06	CN	Letter to Client	G02	9
Critical Information Know Your Client  A/c Ledger Time Ledger Debt Ledger Reserve Ledger	8			09 Mar 2016 29 Feb 2016	10:06 13:00	CN CN	Letter to Client Copy of Bank Statement		4

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

			Change Action ( 3	067)			<b>-</b> ×
Action							
Generate Document	🖉 Post Time 📒 Note	🚦 High	Take Action	隧 Save			
🚵 Open Attachment 💿	🖋 Complete 😒 Email	Normal	Assign Action				
Play Dictation	🚔 Print 💫 Email (Template	:) 👎 Low					
Def	ault Actions	Priority	Assignment			 	
General Properties	Attachment/Documents Actio	n Assignments	Other Notes				
Action Status Please s	select a status			/			
Flag P Clea				/			
	-	_ (	Category				
Publish	Priority						
None	⊖ High		<ul> <li>Action</li> </ul>	⊖ st	tatute Date		
O Publish Only	Normal		<ul> <li>Fixed Dated Acti</li> </ul>	on O C	ritical Date		
O Export Only	O Low		○ Note	00	ourt Date		
			<ul> <li>Appointment</li> </ul>	O Se	canned Post/Mail		
			O Reminder	OC	heque Request		
			🔾 Email	OP	hoto ID		
			O Phone Message	⊚ N	on Photo ID		
Publish Status	Other Properties		<ul> <li>Dictation</li> </ul>		orporate Entities		
Communication	Sent Milestone		O Undertaking	00	orporate entities		
	Complete						
	Billable						
	Documents Pro						
	Chow Your Clier	nt					
							Ok Cancel

5. Complete the action.

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

Home Case Reports	Partners Pho	one Log Ma	intain Setup Help		Keyhouse Ca	se Management (	CN - Canol Nolan - 0000 / 0730)		Quick Search (Ctrl + Q)	) - • ×
Start Timer Post Time Accounts										
Case Diary	Case: TEG001/0		RTA on Neter Teg		Client Contacts					Tel: 01-5698741 F/e: CN
<ul> <li>Document Manager</li> <li>Current Client Details</li> <li>Current Case Details</li> <li>Extra Case Details</li> </ul>	Туре	Standard D	ue Diligence		✓ Status	In Progress		v v Approve		
Associates   Critical Information   Know Your Client	Client Type		Private Individual		· introduction by	Face to face meeti	ng	• A who are		
A/c Ledger Time Ledger Debt Ledger	Search Type		Proof	Date Entered	Input By		Matter Code			
Reserve Ledger     Undertakings	Non Photo	ID	Copy of Bank Statement	29 Feb 2016	CN		TEG001/0001			^

## **Client Records**

Documents related to the client rather than to a specific matter can be added here e.g. a Service Level 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 Document 🛛 😨 Post Time 📜 Note	🚦 High 📑 Take Action 🔞 Save	
Open Attachment 🛛 🖌 Complete 🎐 Email	Normal 🕹 Assign Action	
Play Dictation 🛛 🗯 Print 🔗 Email (Temp	olate) 🗸 Low	
Default Actions	Priority Assignment	
General Properties Attachment/Documents A	ction Assignments Other Notes	
Action Status NA	Not Applicable	
Flag 🗭 Clear Flag 💌	Priority	Category
None	O High	Action
O Publish Only	Normal	Fixed Dated Action
O Export Only	Olow	O Note
		<ul> <li>Appointment</li> </ul>
		O Reminder
	Other Properties	Email     Phone Message
	Milestone	Dictation
		Oundertaking
Publish Status	Complete	<ul> <li>Statute Date</li> </ul>
Communication Sent	Billable	<ul> <li>Critical Date</li> </ul>
Communication Sent	Documents Processed	O Court Date
	Know Your Client	O Scanned Post/Mail
		Cheque Request Photo ID
		O Non Photo ID

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

Home Case Reports						
ö ö 🚽	• 🦕 🗶 🚽 👘					
art Timer Post Time Add Accounts	Clear All Delete All Import Other Case Details					
Client/Case	Case: ABA001/0001					Tel: 01-290
Case Diary	Family Law					F/e: CN
Document Manager	General Anti Money Laundering Financial Client Recor	ds Other Details Activit	1			
Current Client 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 that 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.

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

# **Client Contacts**

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

(1)							Keyhouse Cas	e Management	(CN - Carol Nolan - 00	0.01 / 07:29)					Quick	Search (Ctrl + Q	- • ×
Home Case Reports	Phone Lo	g Maintain	Setup Help														
Start Timer Post Time																	
Sclient/Case	Case: BOIB			Advice re Agreer		-											Tel: 01-6653480 F/e: BS
🗿 Document Manager	General	Anti Money Lau	ndering Financia	Client Record	s Other Details	Activity Clie	ent Contacts										
Scurrent Client Details Current Case Details	Search																Standard View
i Extra Case Details	Initials		Home Phone	Work Phone	Mobile	First Name	Surname	Salutation	PPS Number	Title	Address	Email Address	DOB	Marriage Date	Occupation	Dateof Death	Marital Status
Associates Critical Information	► Mr	Fred Ryan		01-665-8700		Fred	Ryan	Fred		FR		Fred.Jones@b					^
Know Your Client	Ms	Cathy Tyler		01-665-7801		Cathy	Tyler	Cathy		СТ		cathy.tyler@b					
A/c Ledger Time Ledger Debt Ledger Reserve Ledger Undertakings																	
Strong Room																	
Tasks																	
Search/Open	C																~
Client/Case																Insert	Change Delete
Time Costing															lau e		shows 2016 15-02

# **Chapter 8: Keyhouse Capture**

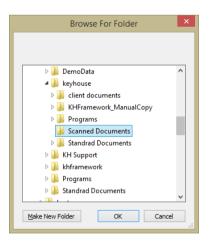
# How to Capture a Folder

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



i)   =			Keyhouse - Capture Documer	its	
Options					^ 🔗 🖬 🦉
ielect Select Assign Filtered Remove Create	New Case	\Users\Brenda\D	ocuments		
File Folder Docs Docs filter Shortcut Capture Document Options	Wizard		Last Selected Folder Pat	h	
Select documents to capture				Preview Panel	
Search					
File Name	Class	Туре	Modified		
🕨 🔺 🗌 🗁 Add-in Express			13 Jul 2015 \land		
adxloader		.LOG	04 May 2		
adxregistrator		.LOG	25 Nov 2		
🔺 🗌 🗁 Camtasia Studio			06 Nov 2		
Custom Production Presets 8.0			16 Sep 20		
🗌 🚞 Media			16 Sep 20		
test		.TREC	06 Nov 2		
🔺 🗌 🗁 Creating Clients & Matters - iSpr			01 Oct 20		
🗌 🛅 audio			01 Oct 20		
🗌 🛅 bgaudio			01 Oct 20		
interactions			01 Oct 20		
🕨 🗌 🔛 quiz			01 Oct 20		
🗌 🛅 video			01 Oct 20		
presentations		.XML	01 Oct 20		
			01 Oct 20		
4 🗌 🗁 Custom Office Templates			22 Apr 20		
Knowledge Articles - Template		.DOTX	16 Sep 20		
Sprinttrainingtemplate		.DOTX	11 Aug 2		
🔺 🗌 🗁 CyberLink			01 May 2		
LocalStorage V2			01 May 2		

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



Type 9

#### Keyhouse

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

=			Keyhouse - C	pture Documents	_ = ×
Options					^ 🔗 🚞 🐂 🍸
	ate New Case tcut Wizard	C:\Keyhouse\keyh	iouse\Scanned Doo Last Sel	uments	
elect documents to capture				Preview Pane	<u>ب</u> اد
File Name	Class	Type	Modified		
▲ 🗌 🗁 Scanned Documents			04 May 2		
20090720sharpscanner@k	ey	.PDF	19 May 2		
20090sharpscanner@keyh	ou	.PDF	16 Feb 20		
Letter from Doctor		.PDF	19 Jun 20		
Sharpscanner-2237		.PDF	18 Jun 20		
🗌 📋 sharpscanner@keyhouse.ie		.PDF	16 Feb 20		
sharpscanner@keyhouse.ie		.PDF	19 May 2		
sharpscanner@keyhouse.i		.PDF	16 Feb 20		
sharpscanner@keyhouse.i		.PDF	29 May 2		
sharpscanner@keyhouse.id		.PDF	19 May 2		
sharpscanner@keyhouse.i		.PDF	16 Feb 20		
sharpscanner@keyhouse.i		.PDF	09 Jun 20		
sharpscanner@keyhouse.id		.PDF	19 Jun 20		

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

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



#### To filter a column heading:

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

(k)   v		Keyhouse -	Сар	oture Documents _ 🗆 💌	
UP Options				n 🖉 🖬 🦉 🍸	0
Select Select Assign Filtered Remove Create New	C:\Keyhouse\key	house\Scanned D	ocur	ments	
File Folder Docs Docs filter Shortcut Wa Capture Document Options	ard	Last S	elec	vr ≭ cted Folder Path	
Select documents to capture Search				Preview Panel C:Keyhouse\kayhouse\Scanned Documents\Sharpscanner-2237.pdf	
File Name Class	Type	Modified			^
A 🔳 📷 Scanned Documents		30 May 2			
20090720sharpscanner@key	.PDF	19 May 2			
20090sharpscanner@keyhou	.PDF	16 Feb 20		DE THE LAW LOCATY	
I Report from the Law Society	.PDF	18 Jun 20			
sharpscanner@keyhouse.ie,	.PDF	16 Feb 20			
sharpscanner@keyhouse.ie	.PDF	19 May 2			
sharpscanner@keyhouse.ie	.PDF	16 Feb 20		14th Annual Report	
sharpscanner@keyhouse.ie	.PDF	29 May 2			
sharpscanner@keyhouse.ie	.PDF	19 May 2		of the	
sharpscanner@keyhouse.ie	.PDF	16 Feb 20		Independent Adjudicator	
sharpscanner@keyhouse.ie	.PDF	09 Jun 20			
sharpscanner@keyhouse.ie	.PDF	19 Jun 20		of the	
			~	Law Society of Ireland	
					~

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

🖑 Tip:

To exclude a file remove the tick.

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

- 6. 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	ents to Case	e/Mat	tter	×
	Case/Matter	BLA001/0002				
	Handler	Admin	~			
	Action Code					
er.	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 docum		e descr		
	Capture settings	Remove captured documents from origin	al location		Import documents to a	-
		Set captured document as complete			Set action as generated	1
	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. <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. This is used primarily when importing multiple documents as a single action.
Capture Settings:	Check the boxes as appropriate to:
	<ul> <li>delete the Captured documents from original location;</li> <li>import documents to a single action (the alternative is that each document will get its individual action in the case diary);</li> <li>mark as complete the action into which the document is to be captured;</li> <li>mark the document as having been generated.</li> </ul>

**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

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

Options			Keyhouse - (	ture Documents	×
Select Select Assign Filtered Remove Create File Folder Docs Docs filter Shortcut Capture Document Options	New Case Wizard	TAScanned Docum		red Folder Path	
Select documents to capture				Preview Panel	*
Search					
File Name	Class	Type	Modified		
A Scanned History			24 Jun 20		
20090720sharpscanner@key		.PDF	19 May 2		
Sharpscanner-2237		.PDF	18 Jun 20		
sharpscanner@keyhouse.ie		.PDF	29 May 2 13 Feb 20		
sharpscanner@keyhouse.ie		PDF	13 Feb 20 19 May 2		
sharpscanner@keyhouse.ie		PDF			
sharpscanner@keyhouse.ie		PDF	29 May 2 19 May 2		
sharpscanner@keyhouse.ie,		PDF	09 Jun 20		
sharpscanner@keyhouse.ie		PDF	19 Jun 20		
20090sharpscanner@keyhouse.ie		PDF	16 Feb 20		
20090sharpscanner@keyhouse.ie sharpscanner@keyhouse.ie.20090		PDF	16 Feb 20		
sharpscanner@keyhouse.ie_20090		PDF	16 Feb 20		
sharpscanner@keyhouse.ie_2012		PDF	16 Feb 20		
Click <b>Select F</b>	ile.	Se	ect ile		

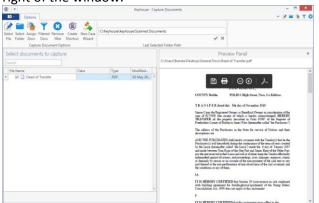
- 2. Click Select File.
- 3. A Windows **Open** dialogue box will appear. Browse and locate the file that is to be captured.

0	C	Open				
🔄 🏵 👻 🕆 🔳 Desktop 🔸				👻 🖒 Search 🛙	lesktop	,P
Organise 🔻 New folder					8:: •	
E Desktop	^ Name	Size	Item type	Date modified		_
Downloads	R Brenda		File folder	05/03/2016 10:13		
3 Recent places	CFI - Demo Workflow		File folder	19/10/2015 16:23		
	Client Docs		File folder	05/05/2016 11:03		
This PC	Current Videos		File folder	05/05/2016 11:07		
Desktop	Data Protection		File folder	13/05/2016 15:47		
Documents	🍶 General Docs		File folder	30/05/2016 16:10		
Music	iSpring Analysis		File folder	05/10/2015 11:40		
Pictures	Jira Issues		File folder	27/05/2016 11:04		
Videos	Keyhouse Training File folder			25/06/2015 12:07		
Windows (C:)	Letters for Attachment for Tr	17/12/2015 15:35				
RECOVERY (D:)	Scanned Documents		File folder	30/05/2016 15:07		
development (\\khdata) (H:)	🎉 Snagit		File folder	01/07/2015 15:59		
mtusers (\\khdata) (N:)	Version Control		File folder	05/05/2016 11:04		
keyhouse (\\brendapc) (T:)	Videos		File folder	23/11/2015 14:54		
keynouse (((brendapc) (1))	this PC					
	* San Discussion					
File name: Deed of	Transfer.pdf					~
				Qs	en	Cancel
				20		Correct

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

		Open				
🕒 🍥 👻 🕆 퉬 > General Docs				✓ Ċ Sear	ch General Docs	۶
Organise 🔻 New folder					800 -	6
E Desktop	^	Name	Date modified	Туре	Size	
Downloads	- 64	Case Importaiss	19/04/2016 17:04	Microsoft Excel W	9 KB	
38 Recent places		Data Protection Questions.docx	01/10/2015 09:59	Microsoft Word D	12 KB	
This PC		Deed of Transfer.docx	01/12/2015 14:18	Microsoft Word D	17 KB	
		Deed of Transfer.pdf	30/05/2016 15:16	Adobe Acrobat D	194 KB	
Desktop		Electricity Bill.doc	21/01/2016 11:47	Microsoft Word 9	102 KB	
Documents		List of Exhibits.docx	27/01/2016 15:41	Microsoft Word D	13 KB	
Music		List of Witnesses.docx	27/01/2016 15:42	Microsoft Word D	13 KB	
Pictures		Statement of Charges.docx	27/01/2016 15:41	Microsoft Word D	13 KB	
Videos		Statement of Evidence.docx	27/01/2016 15:41	Microsoft Word D	12 KB	
Windows (C:)		Will of Jack Flynn.docx	14/04/2016 12:56	Microsoft Word D	35 KB	
RECOVERY (D:)						
development (\\khdata) (H:)						
The second secon						
keyhouse (\\brendapc) (T:)						
	~					
File name: Deed	of Tran	sfer.pdf				`

5. Tag the document to be captured. There will be a Preview of the document in the Preview Panel, on the right of the window.



- 6. If the document is to be captured into a new case use the **New Case Wizard** (on the right of the Options tab) to set up the case first. For further information on how to create a new case see Chapter 3.
- 7. To assign the captured document to a Case, Handler and Action, click **Assign Docs**. The following window will appear.

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

#### The Case will default to the current case. To select a different case, click Case: .... 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. Click the browse button for a list of incoming actions will appear. Select the Action: 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.

#### Provide the following information:

**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 9: The Template Library**

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

# How to Search for precedent documents

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

Home Case Reports	Case Merge Case Conflict Search	elp GoTo				
🔍 Search/Open	letter					
All Matters     My Matters	Work Flow	Document Code	Document Name	Document Class	Document Description           Letters/Interparty Correspondance	
Recent Matters	Circuit Court Civil Bill Procedure	CCBC101B	Letter informing Appellant of adjourned date	LTR LTR LTR LTR LTR LTR LTR LTR LTR		
Contacts	Circuit Court Civil Bill Procedure	CCBC101C	Letter informing Witness of adjourned date		Letters/Interparty Correspondance	
Associates	Circuit Court Civil Bill Procedure	CCBC102AB	Letter to Counsel enclosing fees		Letters/Interparty Correspondance	
Advanced Search	Circuit Court Civil Bill Procedure	CCBC103F	Letter enclosing request for Judgement by Default of Defence		Letters/Interparty Correspondance Letters/Interparty Correspondance Letters/Interparty Correspondance	
My Invoices	Circuit Court	LIT088E	Letter to County Registrar to stamp Motion & Affidavit			
My Cheques	Circuit Court	LIT090	Ltr Serving Motion on Def			
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		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	LITIA	Ltr Barrister encl Brief	LTR	Letters/Interparty Correspondance	

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

## How to sort Column Headings in the Template Library

1. Click on a column heading to sort by that heading e.g. ١ Work Flow

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

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

Work Flow

System Ac

System Ac

Sale

Sale

🍾 Clear Filter

(Blanks)

Sale

(Non blanks)

System Actions

General Office Work

Document

#### How to apply a filter

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

# **Chapter 10: Conflict Search**

## What is a Conflict Search?

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

Work Flow

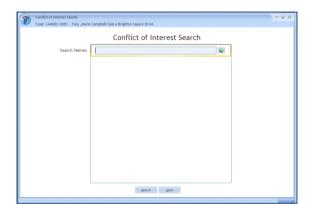
## How to do a Conflict Search

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

Home Case Reports	<u></u>	Conflict Search Case related			
Search/Open	Search Search				
All Matters	Code	Last Accessed	File Colour	Name	Description
My Matters	FLY001/0001 27 Jul 2015 14:35:20			Jack Flynn	Sale of House at: 4 The Mews, Rathfarn
Recent Matters	FLY001/0002	27 Jul 2015 14:35:15		Jack Flynn	Purchase of 16 The Haywain, Terenure,
~	ABA001/0002	27 Jul 2015 14:34:55		David Abraha	HIPS Negligence - October 2010
Contacts	TJF001/0001	27 Jul 2015 14:28:45		TJ Fox	Outstanding debt to PTSB Bank.
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.
ar My Cheques	BES001/0001	21 Jul 2015 16:31:54		Business Time	Lease of Unit 33, Eastgate Avenue, Dubli
😚 Phone Log	AAA001/0001	21 Jul 2015 12:55:18		AAA Securitie	Landlord Dispute
🙆 Firm Undertakings	ABA001/0001	21 Jul 2015 11:52:18		David Abraha	Family Law
📄 Strong Room	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

110

- 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

Stephen Keogh

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

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

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

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	urke/Persona	l Injury at work	Back – modify search	
	File Name			Cancel	
	ConflictOfInterestReport_Stephen_	Keogh_and_othe	rs		
H	🛅 💩 -   🖏 🗛 🖊	1 / 3	🖲 🖲 75% -	😝 🔂 Find 🗸	
ľ					
191 -					
			Confl	ict of Interest Report	
		Case: BOU001	/0001 - Claire Bourke/Per	sonal Injury at work	
		Searched I	name(s): Stephen	Keogh Date:	10 July 2011
			2134590F		
			"Keogh H	oldings"	
			Confl	ict of Interest Report	
		Case: BOU001	/0001 - Claire Bourke/Per	sonal Injury at work	
		Capacity	Name	Other Details	
		Client	Stephen Keogh	Address: 3a Main Street, Bray, Co Wicklow	
				Salutation: Stephen	
		Client	Stephen Keogh	Address: 1 Main Street, Dublin Principal: Stephen Keogh Salutation: Mr Keogh	
		Matter	IBS001/0008 International Business	Address: Grange House, Baggot Street, Dublin 2. Client Name: International Business Services Ltd	
				ctient Name, international business services Ltd	
			Services Ltd -v- Stephen Keogh	Client Name, international business services Etd	
		Matter	Services Ltd -v- Stephen	Address: Grange House, Baggot Street, Dublin 2.	

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.

Confli	ct of Interest Search	×							
The Conflict Search results have not been saved to the current Case.									
Save the Search Results	Discard the Search Results	Cancel							

Search/Open

All Matters
 My Matters
 Recent Matters

Contacts
Associates

Advanced Search
 My Invoices
 My Cheques

Firm Undertakings
 Strong Room
 Document Search

躸 Phone Log

# **Chapter 11: The Strong Room**

# What is the Strong Room used for?

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

The Strong Room also keeps a record of the date the item 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
All Matters 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	1.00	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	
dvanced Search	FLY001/100	FLY001/0001	сом	Jack Flynn/Company Seal for Flynn & Co	1	0	31 Dec 2015
Ay Invoices	0000123126	FEN001/0001	WIL	Richard Fennell/Will	1		18 Jun 2014
ly Cheques	LEA1811	EVE001/0003	LEA	Ever Green Insurance Corporation/Leasehold Agreeement for Turf Rights	1	0	18 Jun 2014
hone Log	D1234	CUL001/0001	DEE	Ann Marie Culler/Deeds for 101 Dun Emer Drive, Dublin 6	1		30 Aug 2014
irm Undertakings	CDA1111	ABB001/0004	DEE	George J Abbott/Title Deeds - Code CDA 1111	1	0	08 Aug 2014
Strong Room	AB8001000	ABE001/0001	DEE	George J Abbott/Title Deeds for second property	ليميا	2	18 Jun 2014

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

George	$\otimes$					Standard View 📃
Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date
ABC000	ABB001/0001	PAP	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 room - Add new File x
	checked.	General Item Diary Client Info
Item Type:	Select the Item Type from the	Item Type * Select Item Type V Item Code * Enter item code
	drop-down list.	Client Code ABA001 Matter Code ABA001/0001
Item Code:	Input an item Code or if left	Client Name David Abrahams Description Family Law
item coue.	•	Description * Deeds to Family Home at 1 High Street, Kells, Co Meath
	blank, the system will	
	generate a code.	Location Select file location Select file location Enter box number
Client Code:	See also Matter Code below.	Search Code Enter search code Fee Earner Select fee earner V Entry & Destroy Date
Matter Code:	If the code of the current	Entry Date Please select date
	matter is not displayed, or	Open O Closed
	you wish to select a different	
	matter, use the browse	
	button to browse the matter	
	list.	QK <u>Cancel</u>
Client Name:	If the name of the Client is not d	isplayed, or you wish to select a different client, use
	the browse button to browse th	
Description:	Uses the Matter Description	
Description:	Input a description of the item.	
Location:	Select a storage location from th	ne dron-down list
Box No:	-	•
	Likewise, select a Box number fr	officine drop-down list.
Search Code:	Input a search code	
Fee Earner:	Use the drop-down list to select	the Fee Earner with responsibility for the item.
Entry Date:	The date on which the item was	entered on the system: normally today's date.
Destroy Date:	The date, if any, on which the ite	em is to be destroyed.
Open/Closed:	This will <b>default</b> to open.	

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

(		Strong room	n - Add new File		×	<b>(</b>		Strong roo	m - Add new File			×
	General Deeds Rem Diary Client Info				_	General Wills	It m Diary Client Info					
I	Item Type * Deeds	~	Item Code *	Enter item code		Item Type *	Wills	~	Item Code *	Enter item code		
I	Client Code Select client code		Matter Code	Select matter code		Client Code	Select client code		Matter Code	Select matter code	~	
I	Client Name Client Name		Description	Matter description		Client Name	Client Name		Description	Matter description		

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

# **Entering Deeds in the Strong Room**

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

				Strong room - Add new File	
General	Deeds	Item Diary	Client Info		
Deeds Ad	ldress	Enter the add	ress		Accountable Trust Receipt
Property	Owner [	Enter the prop	perty's Owner		
					<u>Q</u> K <u>C</u> ance

- 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 address	Accountable Trust Receipt
Date	Please select date   Due Date Please select date	
Comment	Enter the comment	
Property Owner	Enter the property's Owner	
From Whom	Select From Whom	•
	Enter From Whom	
To Whom	Select To Whom	•
	Enter To Whom	
L		<u>QK</u> <u>Cancel</u>

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

## **Entering Wills in the Strong Room**

1. Click to the Wills tab.

		Strong room - Add new File	2 X
General Will	Item Diary Client Info		
Testator	Enter the testator	Executor 1	Enter the executor 1
Enter the testa	tor address	Enter the e	xecutor 1 address
Will Date	Please select date		Enter the executor 2
Est Estate	0.00	Enter the e	xecutor 2 address
Date of death	Please select date	~	
		Executor 3	Enter the executor 3
		Enter the e	xecutor 3 address
			Enter the executor 4
		Enter the e	xecutor 4 address
			QK Cancel

- 2. Enter the Testator and the Executors and the date of the Will.
- 3. The **Date of death** and the **value of the estate** can also be added.
- 4. Click OK.

## Attach a Document to a Strong Room Entry

A copy of a documents can be attached to the Strong Room e.g. a signed copy of a will. This will make the document easier to find in the matter.

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

(	)					Strong	room - Cha	ange File inf	D			×
	General	Wills	Item	History	Item Diary	Client Info	Attachm	ent/Docum	ents			
		Date En	tered	Docume	ent		Version	Doc Class	Track	File Path		
												^
												~
	۲											>
											<u>о</u> к	Cancel

#### Keyhouse

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

		Strong	room - Cha	ange File inf	D			×
General Wills Item	History Item Diary	Client Info	Attachm	ent/Docume	ents			
Date Entered	Document		Version	Doc Class	Track	File Path		
								^
	🖆 Add		achment					
	🥵 Edit	🗔 Lin	k to Folder					
	📫 Delete							
	🐏 Сору							
	Paste							
	<ol> <li>History</li> </ol>							
								<u>_</u>
<								>
							ОК	Cancel

- 6. **Navigate** to the file location e.g. Scan Folder and select the document.
- 7. Click **Open**. The following dialog box will appear.

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

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

	Document Properties	×				
Details File Inform	nation					
Document Name:	sharpscanner@keyhouseie_20120926					
Document Date:	09 May 2016					
Document Class:	Will	*				
Document Type:	PDF					
Ē	<u>O</u> K <u>C</u> ancel					

- 10. Enter the correct name for the document and change the document class if required.
- 11. Click **OK**. You may see the following dialog box.

Document Mana	ger								
•	Do you want to update the Attachment Name as same as Subject?								
Do not sho	Do not show again and remember the last choice I made								
	<u>У</u> еѕ <u>№</u> о								

- 12. Click Yes if you want the name of the document and action in the Case Diary to be the same.
- 13. The document will now be visible in both the **Case Diary** and **Document Manager** as well as the Strong Room.

## How to Withdraw an Item

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

Provide the following information:

#### For Who:

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

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

#### Comment:

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

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

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

	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
	Storing Room Withdraw File	
	Strong Room - Withdraw File	×
You will	I find Will of Kenneth Bunson at File Room, Box No: 4	
	N Ok	

## How to Replace/Return an Item

- 1. Open the **Strong Room** screen, search for and select the item you want to replace.
- 2. Click on the **Replace File** icon on the Home tab.
- 3. The following Replace File dialogue box will appear.

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

- 4. Select the **physical location**, e.g. Box 2, to which the item is being returned.
- 5. Enter the **Box No** if required
- 6. Click **OK**. You will see a message asking you to place the item in the selected location.
- 7. Click **OK**.

## **Delete a file**

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

## 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.

Home Case Repo	orts Phone Lo	g Maint	ain Setup He	elp						
Print Add File Cha	L	ete File	Withdraw File R		tory Diary					
Search/Open	Search									Standard View
	Attn	ATR	Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date	
All Matters			ABC000	A88001/0001	Papers	George J Abbott/				
My Matters		~	DEE	TAR001/0001	Deeds	George Tarrant/		0	30 Jun 2014	
Recent Matters			ABB0010001	ABB001/0001	Deeds	George J Abbott/	1	0	18 Jun 2014	
Contacts			12345		Backup T	Friday 1 Backup	1	0	01 Jan 2020	
Associates			AAA0010001	AAA001/0001	Wills	AAA Securities Lt	1	0	31 Oct 2014	
Advanced Search			AAA0010001	AAA001/0001	Wills	AAA Securities Lt	1	0	31 Oct 2014	
My Invoices			123123	AAA001/0001	Wills	AAA Securities Lt	0	0		
My Cheques			test	OWE001/0001	Deeds	Peter Owen/Test	1	0	30 Jun 2014	
Phone Log			LEA1811	EVE001/0003	Lease A	Ever Green Insur	1	0	18 Jun 2014	
Firm Undertakings			0000123124	AAA002/0002	Compan	AAA Worldwide	1		18 Jun 2014	
Strong Room	- A		0000123125	AAA002/0002	Papers	AAA Worldwide	1		18 Jun 2014	
Document Search			0000123126	FEN001/0001	Wills	Richard Fennell/	1		18 Jun 2014	
🖲 Template Library			0000123127		Backup T	Year End Backup	1		18 Jun 2014	
			D1234	CUL001/0001	Deeds	Ann Marie Cullen	1		30 Aug 2014	
			0000123128	RYA002/0001	Wills	Margaret Ryan/	1		18 Jun 2014	
			0000123129	AAA001/0001	Compan	AAA Securities Lt	1		19 Jun 2014	
			0000123130		Backup T	Year end backup	1		19 Jun 2014	
			CDA1111	A88001/0004	Deeds	George J Abbott/	1	0	08 Aug 2014	
			0000123131	BLA001/0001	Deeds	Gordon T. Black/	1	0		
	•		0000123133	BAR002/0001	Deeds	Kevin Barrett/Sal				
		~	0000123134		Deeds	Jane Doe - Deeds	1	0		
			0000123135		Wills	Will for Jane Doe	1	0		

3. Search for the item required and select it.

		5	trong Room - Replace File		×
tem Code	00	0001231	31		
Description	G	ordon T.	Black/RTA Walkinstown Crossroads	, G	. Black
lient Code	BI	A001			
ocation	Fi	le Room			~
Box No	[			]	
		Code	Location		Cancel
		BOX1	Box 1	^	
		BOX2	Box 2		
		DUB	Dublin		
		OFF	Offsite		
	Þ	STR	File Room		
				~	

	Strong Room - Replace File	×
Item Code	0000123131	
Description	Gordon T. Black/RTA Walkinstown Crossroads, G. Black	
Client Code	BLA001	
Location	File Room	¥
Box No	4	
	<u>O</u> K <u>C</u> ancel	)

Strong Room - Replace File	х
Please replace the item Will of Kenneth Bunson to BOX2, Box No.4	
Ok	
Ŭ.	

- Note to add the Withdrawal Comment to the grid, see the section on Creating User Views in Chapter 18 – Personalise your Keyhouse (p. 176).
- 4. Click on the **History Tool** on the Home tab. The following screen will appear showing the history of the item.



				Strong roo	m - History				
Ite	em History Atta	chment/Documen	ts						
[	Search								
	By Who	For Who	Out Date	Out Time	In Date	In Time	Comment	Item Code	
Þ	Brian Sweeney	Brian Sweeney	18 Jun 2014	17:05:06	18 Jun 2014	17:09:50	Work on the file	0000123125	1
	Brian Sweeney	Martina Wint	18 Jun 2014	17:07:06	18 Jun 2014	17:09:50	Working on the file	0000123125	
	Brian Sweeney	Brian Sweeney	18 Jun 2014	17:09:29	18 Jun 2014	17:09:50	working on the file	0000123125	
	Brian Sweeney	Brian Sweeney	18 Jun 2014	17:10:13			today	0000123125	

5. Click Cancel to exit this screen.

# 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.

D								Keyhouse Case I	Management (CN - Carol Nolan - 00.01 / 07.29)	Quick Search (Ctrl + Q)
Home Case Repo	rts Phone Lo	g Maint	tain Setup He	elp						
Print Add File Chai		ete File	Withdraw File R		tory Diary					
Search/Open	Search									Standard View
All Matters	Attn	ATR	Item Code	Matter Code	Item Type	Item Description	Status	Open/Closed	Destroy Date	
Mir Matters			ABC000	ABB001/0001	Papers	George J Abbott/	1			
		~	DEE	TAR001/0001	Deeds	George Tarrant/	1	0	30 Jun 2014	
Recent Matters			AB80010001	ABB001/0001	Deeds	George J Abbott/	1	0	18 Jun 2014	
Contacts			12345		Backup T	Friday 1 Backup	1	0	01 Jan 2020	
Associates			AAA0010001	AAA001/0001	Wills	AAA Securities Lt	1	0	31 Oct 2014	
Advanced Search			AAA0010001	AAA001/0001	Wills	AAA Securities Lt	1	0	31 Oct 2014	
My Invoices			123123	AAA001/0001	Wills	AAA Securities Lt	0	0		
<ul> <li>My Cheques</li> </ul>			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	- A		0000123125	AAA002/0002	Papers	AAA Worldwide	1		18 Jun 2014	
Document Search			0000123126	FEN001/0001	Wills	Richard Fennell/	1		18 Jun 2014	
Template Library			0000123127		Backup T	Year End Backup	1		18 Jun 2014	
			D1234	CUL001/0001	Deeds	Ann Marie Cullen	1		30 Aug 2014	
			0000123128	RYA002/0001	Wills	Margaret Ryan/	1		18 Jun 2014	
			0000123129	AAA001/0001	Compan	AAA Securities Lt	1		19 Jun 2014	
			0000123130		Backup T	Year end backup	1		19 Jun 2014	
			CDA1111	ABB001/0004	Deeds	George J Abbott/		0	08 Aug 2014	
			0000123131	BLA001/0001	Deeds	Gordon T. Black/	1	0		
	• A	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 including documents not related to a specific case/client will be listed.
- 4. Complete the form as detailed in Add a file to a Case (p. 114). However, you will not be able to add a Client/Matter details.

#### Keyhouse

Item Type *	Deeds	~	Item Code *		
	Deeds	•	item Code -	Enter item code	
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 & Destr	oy Date				
Entry Date	06 Aug 2015	~	Destroy Date	Please select date	~
Open	Closed				

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		
A	~	0000123133	BAR002/0001	Deeds	Kevin Barrett/Sale of 1 High Street, Kells, Co Meath	1	0		
	1	0000123134		Deers	Jane Doe - Deeds	1	0		1
		0000123135	$\overline{}$	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. **118**) and Viewing the History of a document (p. **119**) is the same as the process already detailed.

# **Chapter 12: Time Recording**

# Time Recording in the Case Diary

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

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



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 Docur		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		₽	₽	<mark>₩</mark>				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 🕨		×
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	 <u></u>	02:00	TJ Fox	TJ Fox Outstanding debt	General Advi	27 Ju	
	ABA001/0002	 (	00:03	David Abr	David Abrahams HIPS N		04 A	
	FLY001/0002	 <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: -

			Post Ti	me 🗖 🗙
Matter:	The code of the current	FLY001/0001 Jack Flynn		Select Matter
	case is automatically	Sale of 10 Rose Law	n, Blanchardstown, Dublin 17	
	displayed. Click the	Administration Time Time Recorder	Carol Nolan	
	Select Matter button to	Date	22 Jun 2016	Retain selected Time Recorder
	bring up the matter list	Time	Minutes     O	0.00 🗘 🔿 Hours 0:00 🗘 🗘 Days 0.00
	and select a different	Time/Charge	Time     Charge	
			Hours Rate	Charge  Charge  Is Chargeable
	case if required.	Task	0.0000 X 100.00 Select a task	= 0.00 ⊻ Is Chargeable Suggested Narrative
Date:	By default, the date the		Select a task	Suggested Harrative
Bute.	time was recorded will			
	be shown. Change if			
	required.	Task not	specified	Save And New Save Save & Einish Cancel
Time/Charge:	Use the <b>option buttons</b>		specified	Save And <u>N</u> ew Save Save & <u>Finish</u> <u>Cancel</u>
Third, enarge.	to select whether this entry	, chould	he charged on the	basis of time spont or as
		/ should	be charged on the	e basis of time spent of as
	a set charge.			
Minutes/Hours/Days:	This will show the time reco	orded an	d can be amende	d if required.
Hourly Rate:	The hourly rate will display	the <b>defa</b>	<b>ult rate</b> for this h	andler and case.
Chargeable:	Check the box if this time is	chargea	ble or uncheck it	if it is not. This can be set
enargeasier	as a default setting by the S	-		
	as a default setting by the c	ystem A		
Tasla			f	_
Task:	Use the <b>drop-down</b> arrow t	lo select	from a list of task	S.
Comment:	Input a narrative to describ	e the tin	ne entrv	
			,	

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.

00:00:36

ABA001/0003

🗹 🕹

🔶 🔍 🗙

00:01:49

#### 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**.



ABA001/0003

- 6. Select the required timer.
- 5. **Double click** the entry to amend, the following screen will appear.

(iii)	Post Time			Post Tim	e	
FLY001/0001		Select Matter	Administration Time			
Jack Flynn Sale of 10 Rose Law	vn, Blanchardstown, Dublin 17		Non Chargeable Code	Select non chargeable code		
Administration Time	e 🗌		Time Recorder	Carol Nolan 👻	Retain selected Time Recorder	
Time Recorder	Carol Nolan Retain selected Time Recorder		Date	22 Jun 2016		
Date	22 Jun 2016		Time	Minutes     O	0.00 🗘 🔿 Hours 0:00	C Days 0
Time	Minutes     0     0     Units     0.00     O     Hours     0:00     O	) Days 0.00 🗘				Suggested Narrativ
Time/Charge	Time     Charge					
	Hours         Rate         Charge           0.0000         X         100.00         =         0.00         If is Chargeable					
Task	Select a task	Suggested Narrative				

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

Save & New	Will create a subsequent time slip for the same client
Save	Will leave the time slip available on the list of timers for continued use
Save & Finish	Will complete the time slip and remove it from the list of timers

**NOTE:** All time slips will need to be posted at the end of the day.

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

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

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

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

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

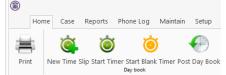
10. Click on **Save and Finish**. This time entry is then transferred to the daybook ready for posting to time ledger.

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

#### How to create an Empty Timer

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

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



- 2. To pause the timer click on the clock.
- **NOTE:** It is also possible to start a new timer in an existing case.
- 3. Click on the Start timer tool on the Home tab. The current case will automatically be selected. This may have to be deleted.
- 4. Click on the **Green Plus** to add an empty timer.
- 5. Click on **clock** to start the timer.
- 6. To amend the entry, expand the timer by clicking on Maximise.
- 7. **Double click** the entry to add details for posting. This will bring up the Post Time dialogue box (see How to Post Time from the Timer, (p. 127 above), but without a matter code.

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

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

9. 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

		Post T	ime				□ ×
FLY001/0001						Sel	ect Matter
Jack Flynn Sale of 10 Rose Lawn	, Blanchardstown, Dub	lin 17					
Administration Time							
Time Recorder	Carol Nolan	<b>v</b>	Retain se	lected Time Reco	rder		
Date	22 Jun 2016	*					
Time	O Minutes	0 🗘 🔿 Units	0.00	Hours 0:00		O Days	0.00 🗘
Time/Charge	<ul> <li>Time</li> </ul>	○ Charge					
	Hours	Rate		Charge			
	0.0000	100.00	=	0.00	Is Charge	able	
Task	Select a task	•				Suggestee	d Narrative
Task not s	pecified			Save And <u>N</u> ew	Save S	Save & <u>F</u> inish	Cancel

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

Matter:	The case code will default to the current matter; to change the case, use the <b>select matter</b> button to view the matter list and double-click the required case to select it.
Date:	This will default to the date the timing was recorded. Amend if required.
Minutes/Hours/Days:	Input the amount minutes, hours, days etc.
Time/Charge	<b>Using</b> the <b>option buttons</b> provided, set if the time recording is to be charged by time or a set charge.
Hourly Rate:	The hourly rate will display the <b>default rate</b> for this handler and case.

Chargeable:	Using the tick box provided tick if the time is chargeable or remove if it is not. This will default to chargeable.
Task:	Click on the drop down arrow to reveal a list of tasks. Click the task required.
Comment:	Input a narrative to describe the time entry

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

## How to create an Admin Time slip

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

		Post Time		□ ×
Administration Time				
Non Chargeable Code	Select non chargeable code	~		
Time Recorder	Carol Nolan	✓ 🗌 Retain	selected Time Recorder	
Date	22 Jun 2016	~		
Time	O Minutes 0	O Units 0.00	Hours 0:00	C Days 0.00
				Suggested Narrative
Task not sp	ecified		Save And <u>N</u> ew <u>S</u> ave	Save & <u>F</u> inish <u>C</u> ancel

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.

•

#### 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.

My Day Book	Ö	er Post Day Book	elp				
Time Costing Ay Day Book	ner Start Blank Tim Day book	er Post Day Book					
Time Costing	ner Start Blank Tim Day book	er Post Day Book					
Time Costing	Day book						
My Day Book	Day Book Summar						
My Day Book		Y III					
	Chargeable 09:0	6 Non-Chargeable	00:00 Total 09:06 Re	maining 00:00		Handler Carol Nolan	
Time Report	Date 1	vlatter Code	Client Name	Matter Details	Comment	Case Time	Charge
My WIP by Bill Date My Top WIP	27 Jul 2015	TJF001/0001	TJ Fox	TJ Fox Outstanding debt to PTSB Bank.	Demand & Draft Proceedings	00:01	2
Dashboard -	27 Jul 2015	[JF001/0001	TJ Fox	TJ Fox Outstanding debt to PTS8 Bank.	General Advice	00:30	75
Jashboard	27 Jul 2015	FJF001/0001	TJ Fox	TJ Fox Outstanding debt to PTSB Bank.	Court Attendance	01:00	150
	27 Jul 2015	FJF001/0001	TJ Fox	TJ Fox Outstanding debt to PTSB Bank.	Dictation	00:30	75
		[JF001/0001	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							
Search/Open Client/Case							

#### **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.

 $^{\checkmark}$  Tip: Click on a column heading to sort by that heading, e.g. Matter Code

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

1. Click on **New Time Slip** on Home Tab in **My Day Book**. The familiar Post Time dialogue box (see How to create a manual time slip, p. 127 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. 127 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 to create an Admin Time slip, p. 128 above).
- 3. Complete the details of Date, Time, Non-Chargeable Code and Comment as above, How to create an Admin Time slip, (p. 128).
- 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.
- Add
  Edit
  Delete
  Start Timer
  Go To Case Diary

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.

irint - Start Timer Post Ti		Guide Write-Off									
Client/Case	Case: BLA001/0001	Gordon T. Black RTA Walkinstown Crossroads. G. Black									el: 01 4 /e: BS
Case Diary Document Manager	Search	RTA Walkinstown crossroads, G. Black									dard \
Current Client Details Current Case Details	Date	Comment	Time or Charge	Time	C/N-C	Charged	Billed Amount	Invoice No	Task	T/R	
Extra Case Details	03 Aug 2010	Billed Fees: 60000	Bill		0 Chargeable	(60,000.00)	0.00	1	0 BILLED	Brian Sweeney	,
Associates	09 Nov 2010	For taking initial instructions and memoing the same.	Time		14 Chargeable	57.50			0 Document Drafting	Brian Sweeney	
Critical Information	14 Mar 2011	General	Time		18 Chargeable	75.00	75.00		8 General Advice	Brian Sweeney	
Know Your Client	17 Apr 2011	Attendance	Time		26 Chargeable	107.50	107.50	21	8 Attendance	Brian Sweeney	
A/c Ledger	20 Apr 2011	Advice	Time		60 Chargeable	250.00	250.00	21	8 Advice	Brian Sweeney	
A/c Ledger Time Ledger	24 Apr 2011	Letter	Time		10 Chargeable	42.50			8 Letter Drafting	Brian Sweeney	
Debt Ledger	30 Apr 2011	Photocopying	Time		30 Chargeable	125.00	125.00	21	8 Photocopying	Brian Sweeney	
Reserve Ledger	12 May 2011	Billed Fees: 600.00	Bill		0 Chargeable	(600.00)	0.00		8 BILLED	Brian Sweeney	
Undertakings	12 May 2011	Billed Fees: 600.00	Bill		0 Chargeable	(600.00)	0.00	21	8 BILLED	Brian Sweeney	
	15 May 2011	Review medical report of GP for PIAB application	Time		50 Chargeable	207.50	0.00		0 Document Drafting	Brian Sweeney	
Strong Room	17 May 2011	Phone call with client updating him of the status	Time		3 Chargeable	15.00	0.00		0 General Advice	Martina Winte	rs
	21 May 2011	Client Meeting to clear up issue in medical report	Time		35 Chargeable	145.00	0.00		0 Client Meeting	Brian Sweeney	1
	30 May 2011	Advice client of possible next action and agree next step.	Time		30 Chargeable	125.00	0.00		0 Advice	Brian Sweeney	
	10 Jun 2011	Completed PIAB Application and draft form for approval	Time		60 Chargeable	250.00	0.00		0 General Advice	Brian Sweeney	1
	19 Jun 2011	Telephone call with client regardind queries on PIAB form.			10 Chargeable	42.50	0.00		0 Telephone Attendance	Brian Sweeney	
	23 Aug 2011	Amending Letters/Document	Time		10 Chargeable	51.00	0.00		0 Phone Call	Martina Winte	rs
	01 Sep 2011	Finalise PIAB application and lodge same with PIAB	Time		5 Chargeable	12.00	0.00		0 Phone Call	Martina Winte	rs
	08 Sep 2011	Letter informing client of costs to date	Time		5 Chargeable	24.00	0.00		0 Phone Call	Martina Winte	rs
	29 Sep 2011	Draft Letter to Garda requesting technical information	Time		9 Chargeable	30.00	0.00		0 Phone Call	Martina Winte	rs
	11 Oct 2011	Review File and Draft Letter to client re status	Time		15 Chargeable	25.00	0.00		0 General Advice	Stephen Keog	h
	11 Oct 2011	Phone call with client re more gueries	Time		10 Chargeable	17.00	0.00		0 General Advice	Stephen Keog	h
	11 Oct 2011	Client Meeting re special damages	Time		25 Chargeable	42.00	0.00		0 Client Meeting	Stephen Keog	h
	21 Nov 2011	Phone Call re Medical Report	Time		15 Chargeable	75.00	0.00		0 Phone Call	Martina Winte	rs
	22 Nov 2011	Client Meeting	Time		15 Chargeable	62.50	0.00		0 General Arbrice	Stenhen Kenn	h
	Summary										
	Total WIP (Hrs:Mins):	22:05								WIP Value:	5,
	Total Recorded (Hrs:	Mins): 26:29								Recorded Value:	6,
	Total Chargeable (Hr	s:Mins): 24:29								Chargeable Value:	5,
Tasks	Total Non-chargeabl	e (Hrs:Mins): 2:00								Non-chargeable Value:	
Search/Open	Write Off (Hrs:Mins):								Write Off Value:		
										Billed:	60.)

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

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

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

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

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

Client

	Draft	Invoice			□ ×
Ok Message:					
Cancel	Credit Note   Invoice	Open Invoice	Bill Sent Inv	oice / Bill No: (not	invoiced)
Matter Details -					
Ma	tter: FLY001/0002	Jack Flynn		Bills:	0.00
Fee Ea	rner: Carol Nolan 💙			Outlay:	0.00
Descrip	tion: Purchase of 16 The Haywain, 1	Terenure, Dublin 6		Client:	0.00
Choose report	Date: 07 Aug 2015 🗸 🗸	Transfer To Pay		Charges: Time (HH:MM):	7:21
Bill Layout V Bill T	D: Jack Flynn 4 The Mews			Time (HH:MM):	7:21
Print Copy	Rathfarnham				
Clie					
Our	Ref: CN You	ur Ref:			
Write down Tim	e to: 07 Aug 2015 💙				
Invoice Details	Fee Earner Breakdown				
Type Nar	ative	Net	VAT Value Fee	Earner	
Release					^
Notify Release Inv					
Create FNL					
	Righ	nt-Click for O	ptions		
1					
Billing Guide					
Matter Ledger					~
	ay: 0.00 Miscellaneous Fees: 0.00	VAT: 0.00		Bill Tot	tal: 0.00
Requested By: Carol Nolan Draft Number: (n	ew)				

Message: Input a message for the account department (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<br/>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.

Billing Guide

- 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
    - Click on Billing Guide at the bottom left corner to start the Billing Guide Wizard.



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

The options for grouping time are:

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

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

The options for grouping outlay are similar:

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

C	Billing Guide	Wizard						
Π	me to: Friday 31	i July 2015	Out	ilay to: Monday 0		2 - Jack Flynn/Pure	chase of 16 The Haywain, 1 Draft No:	
Ite f	f Action	° Type	* Matter	^e Handler ^e G	Dutlay [†] Descrip	tion	* Outstanding	* BillNow
C	) Bill Partially	F	FLY001/0002	CN	Total Fee	s	1,102.5	0 952.50
								_
1								
×.			11					•
							Total Fees: Total Outlay:	952.50
							Grand Total:	952.50
							Refresh Ok	Add to invoice
								- an an arrona

		Soo Grabb	it & Runne			
		VAT No: 8	746675DD			
				D	ate:	07/08/2015
				In	voice No :	0
Jack Flynn				0	ır Ref:	FLY001/0002
4 The Mews Rathfarnhan Dublin 6a						
Date	Billing Description		Time	Net Fees	VAT Amou @ 23	
OurRef FLY001/0002	YourRef Purchase	of 16 The Haywain, Ter	enure, Dublin 6			
03/07/2015	Demand & Draft Proceedings		00:50	125.00	28.	76
03/07/2015	Attendance		00:30	75.00	17.3	25
	Demand & Draft Proceedings		03:01	452.50	104.0	
03/07/2015	Court Attendance		02:00	300.00	69.0	00
03/07/2015	I.DATE (DateTime)	Matter Totals:	06:21	952.50	219.	0.0
03/07/2015						

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

This example shows no Grouping on either fees or outlays

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

#### How to Partially Bill an Item

Double-click the item to be

changed:

- Click the figure in the Bill Now column and change the amount.
   The Action will change to Partially Billed.
- Click **OK** to save the change.

#### How to exclude an action item from a bill

- Click the item to be excluded.
  - Tip to exclude more than one item hold down the CTRL key on your keyboard and click on each of the items.
- Right-click the selection and choose one of the following commands from the pop-up menu:
  - **Do not bill Selected Items** the items will be excluded from the current bill only;
  - **Exclude Selected Items from all Bills** the items will not be included in any future bill.

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

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

	ng Guide Wizard <u>B</u> ack					- 6
	Friday 31 July 20	15 Ou	itlay to: Monday 01	Matter: FLY001/0002 - Jack Flynn/Pur- I January 1900	chase of 16 The Haywain, Te Draft No: 2	
Items Action	° Туре	e [®] Matter	^e Handler ^e G	0utlay [©] Description	[¢] Outstanding	* BillNow
🛅 Bill in Fu	JII F	FLY001/0002	CN	Demand & Draft Proceeding	gs 125.00	125.0
🗎 Bill in Fu	JII F	FLY001/0002	CN	Demand & Draft Proceeding	gs 452.50	452.5
🗎 Bill in Fu	JII F	FLY001/0002	CN	Court Attendance	300.00	300.0
🛅 Bill in Fu	JII F	FLY001/0002	CN	Attendance	75.00	75.0
Don't Bi	I F	FLY001/0002	CN	Court Attendance	150.00	0.0
•						
					Total Fees:	952
					Total Outlay:	
					Grand Total:	952
					Refresh Ok	Add to Invo
						_
ard						- (
					(	
				E001/0001 - Charlie Gleeson/Lea	se of south west Geor	ges stree
		oup: Attenda	nce on client			
* Matter	4	Handler [©] Out	lau Pa	escription	* Outstanding	BillNow
matter		nanuer Out	uay De	scription	outstanding	DIUNOW
GLE001/		s		endance on client	600.00	300.



#### 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	[‡] Matter	[‡] Handler [‡] Outla	y [¢] 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							
[‡] Action	* Туре	* Matter	[‡] Handler [‡]	Outlay	* Description	Outstanding	* BillNow
Bill in Full	F	GLE001/0001	BS		File Review re counsels fees and our fees	42.50	42.50
Bill in Full	F	GLE001/0001	BS		Letter to client re instructions and section	95.00	95.00
Bill in Full	F	GLE001/0001	BS		Letter to Noel Common SC	187.50	187.50
Bill Partially	F	GLE001/0001	BS		Attendance on client	600.00	300.00

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

## OR

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

Auding a Line	to the bill manually			
	Draft Invoice			
ok Ok	Message:			
Cancel	Request Type:   Invoice  Open Invoice	ce / Bill No: (not invoiced)		
	┌─ Matter Details ──────			
	Matter: FLY001/0001	Jack Flynn		Bills: 0.00
	Fee Earner: Carol Nolan			Outlay: 0.00
	Description: Sale of House at:			Client: 0.00
	4 The Mews			Charges: 282.50
Choose report	Rathfarnham Dublin 6			Time (HH:MM): 1:53
Bill Layout	Date: 03 Jul 2015 V Transfer	r To Pay		, <u> </u>
Print Copy	Bill To: 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	v
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)	4

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

Invoice Details Fee Earner Breakdown

Fee Earner

i) Click the Fee Earner Breakdown Tab.

Percentage

·		-	Add a Bill [	Detail Line	
		>	Clear Bill D	etail Lines	
VAT	VAT Amount				

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

Anne Mellon

15

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: O Percent	ages 🔿 Values		
Fee Earner		Percentage	Value
Carol Nolan		65.36797	867.76
Brian Sweeney		34.63203	459.74
	Ok Cancel	]	

- iv) Alternatively, you may right-click on any of the fee earners and select the required command from the pop-up menu.
- v) If you select Add Fee Earner, you will be able to choose from a list of fee earners by doubleclicking.
- vi) If you select **Cut Fee Earner allocation for [Fee Earner Name]**, that fee earner's allocation will be removed from the breakdown
- vii) In either case, you will be returned to the *Edit Fee Earner Breakdown* screen, where you can alter the percentages or values as described in iii) above.
- viii) Click **OK** to save the changes and be returned to the **Draft Invoice** screen.
- 5. Click **OK** on the left-hand column of the **Draft Invoice** screen to save the draft bill or **Release** to send to accounts for approval.
- 6. The Draft Bill will appear as an entry in the case diary for future review.

	+	Add Fee Earner
	4	Distribute Evenly
5 Nov 2014 14:03 CN Draft Bill Draft Bill No: 268		Renormalise percentages
Civ Diarcom Diarcom No. 200	×	Cut Fee Earner allocation for: "Ar
	4	Revert to original

- 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)	)		Quick Search (Ctrl +	) ×
Home Case Reports	Phone Log Maintain Setup Help					-	
🕂 / 🗙 📓							
Add Edit Delete A/c Ledger Bil 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	► FLY001/0001	03 Jul 2015	Jack Flynn	4 The Mews Rathfarnham Dublin 6a	1	710.	33 280 ^
Contacts							
Associates							
Advanced Search							
Hy Invoices	man		and the second second second	and the second the second the second the second sec		m	m. m. mm

## **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 Close

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

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

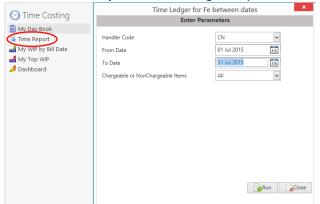
FLY001/000	1	Jack Flynn Sale of House at: 4 The M	lews, Rathfarnham, Dublin 6						
Date	FE	Comment	Tas	Time Hrs:Min	Accum. Hrs:Min	Rate	Charge	Accum Charge	OS Charge
03/07/2015	CN	Phone Call	PHO	0 : 11	0 : 11	150.00	27.50	27.50	27.50
03/07/2015	CN	Document Drafting	DR	1:00	1 : 11	150.00	150.00	177.50	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	DR	0:30	1 : 51	150.00	75.00	277.50	75.00
		A.H			4 . 50			202 50	5.00
03/07/2015		Attendance			1 : 53 1 : 53	150.00	5.00	282.50	282.50
03/07/2015	Sur		arner			Charge	5.00	282.50	
03/07/2015	Sur Fee E	nmary WIP Fee E	arner	ime			5.00	282.50	
03/07/2015	Sur Fee E	<mark>nmary WIP Fee E</mark> iarner ^{Nolan}	arner (H	ime s:min)		Charge	5.00	282.50	
03/07/2015	Sur Fee E Carol WIP T	<mark>nmary WIP Fee E</mark> iarner ^{Nolan}	arner (H	ime <u>s.min)</u> 1 : 53		Charge 282.50	UnBilled		
03/07/2015	Sur Fee E	nmary WIP Fee E	arner	ime s:min)		Charge	5.00	282.50	

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.

Soo Grabbit & Runne Time Entry For FE Between Dates Report CN: Carol Nolan Matter Client Matter Description Hrs:min Rate Charge Task Comment Time Entry Date : 090/2015
Initie Entry For FE between Jacks response CN: Carol Natas Matter Client Matter Description Hrsmin Rate Charge Task Comment
Time Entry Date : 03/07/2015
Admin Time 0.10 60.00 60.00 3.00 60.00 60.00 Golf Tournament
30:01 €0.00 €0.00
AlG001/0002 Allied Investment Garry Barlow -v- Hired Talent 2:00 €150.00 €300.00 DIC: Dictation Dictation
Group Services BLA0910001 Gordon T. Black RTA Walkinstown Crossroads, G. 0.30 €150.00 €75.00 ATT: Attendance Attendance
Black         Black           BL0001/0005         Joe Bloggs         Advice File         0 .: 00         €0.00         €570.00         ob9byby;y
BRE001/0001 Mike Breaze Broken left leg. 1:00 €150.00 ADV: Advice Tailed with Nike re options for settlement.
1:00 €150.00 €150.00 DIC: Dictation Dictor and Opposing Council
0:30 €150.00 €75.00 REV: File Review Review Medical Report
1:00 €150.00 INS: Instructions received - Meeting
received with Client 1:00 €150.00 €150.00 COU: Court Attendance
FLY001i0001 Jack Flynn Sale of House at 4 The Mews, 0 11 €150.00 €27.50 PHO Phone Call Phone Call Rathumban, Duble 6 10.00 €150.00 PAR. Document Dublino Document Darting
Rathfamham, Dublin 6         1:00         €150.00         €150.00         €150.00         ERA:         Decument Drafting           0:10         €150.00         €25.00         FIA:         Decument Drafting         Decument Drafting
0:30 €150.00 €75.00 DRA: Document Drafting Draft Bil No274
ELY0010002         Jack Flymn         Purchase of 16 The Haywain.         0 : 50         €150.00         €50.00         Attendance         Attendance
Terenure. Dublin 6 Proceedings
1:00 €150.00 €150.00 COU : Court Attendance Court Attendance 0:30 €150.00 €150.00 €75.00 ATT : Attendance Attendance
3 01 €150.00 €452.50 DEM Demand & Draft Droceedings
Proceedings 2:00 €150.00 €300.00 C/U: Court Attendance
2:00 E150.00 E300.00 COU: Court Attendance Court Attendance
Daily Time Daily Value
Daily Recorded Mins: 49:25 Admin (Hrs): 33:11 Characeable (Hrs): 16:14 (£ 005:00 Unassigned (Hrs): 0:00
Chargeable (Hrs):         15:14         4(8.005.00)         Unassigned (Hrs):         0:00           Non-Chargeable (Hrs):         0:00         Write Offs (Hrs):         0:00
£3/005/00
Nayhouse Legisl // Specialists www.sayhouse.g Page 1.0/2

### 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

	WIP for Fee Earner by Last Bill Date						ate : 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 Lynch	Share Holding Agreement	0.00	300.00
	29/05/2012		AIG001/0002			0.00	300.00
	29/05/2014			Business Time Limited	Garry Barlow -v- Hired Talent Services	0.00	300.00
					Lease of Unit 33, Eastgate Avenue, Dublin 12.		
	03/07/2015		BRE001/0001		Broken left leg.	0.00	675.00
	29/09/2011			Thomas Brolin	Legal Advice re Repatriation	(200.00)	110.00
	24/05/2011		FIN001/0002	Finance Department	Damages - 21 Main Street	0.00	6.00
	02/07/2015			Jack Flynn	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6		282.50
	02/07/2015			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							
	08/05/2010	12/05/201	1 BLA001/0001	Gordon T. Black	RTA Walkinstown Crossroads, G. Black	0.02	1.075.00
Decen							.,
Decen		31/12/201	1 LOW001/0004	Lowery Developments	Receivership - Nama Properties - No 81 Sandyford Business Park	(925.00)	192.00
	02/05/2012	31/12/201	1 LOW001/0005	Lowery Developments	Receivership - Nama Properties - South County Dublir - Disouted	(1,000.00)	667.50
2012							
Janua	ov.						
Janua		21/01/201	01000000000	Lowery Developments	Receivership - Nama Properties No 2 Sandyford Estat	e (925.00)	225.00
	02/05/2012	51/01/201	2 LOW001/0002	Lowery Developments	Receivership - Nama Properties No 2 Sandyford Estat	e (925.00)	225.00
March							
	10/11/2011	06/03/201	2 LAW001/0001	Liz Lawlor	Advice re Inheritance tax	(5,000.00)	147.00
2014							
June							
		19/06/20	14 ABA001/0001	David Abrahams	Family Law	(7,737.17) Chargeable WIP Non-Chargeable WIP	4.00 9,961.70
						Report WIP Totals :	9,961.70 * Non-Chargeable Time

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.

				Soo Grabbit & Runne			
		V	NIP for Fee	Earner by Last Bill Date		Data Date : 1	2/11/2014:21:14
Started	Last Bill Date Matter			Description		Client A/C	WIF
	Carol Nolan						
08/05/2004	ABBO	1/0001 Georg	e LAbhott	Sale 45 Somserset Road, Dublin 6	3	(345.000.00)	437.50
					,	(343,000.00)	300.00
02/12/2005					e Dublin 12	0.00	161.20
24/05/2011	FIN001	1/0002 Financ	e Department	Damages - 21 Main Street		0.00	3.00
11/12/2013	KEL00	2/0001 Sarah	Kelly	Purchase of Property		0.00	4.50
02/05/2012				Receivership - Nama Properties - Estate	No 3 Sandyford	(925.00)	500.00
01/01/2010				Accident at work			300.00
23/09/2010	SHA00	11/0003 John S	Shaw	Jones Trust		0.00	49.50
03/06/2010	20/04/2009 QUI00	1/0005 Alan C	λuinn	Sale of 12 Main Street, Bray, Co. \	Nicklow	0.00	600.00
14/01/2011	30/05/2009 FIT001	/0001 Scott F	Fitzpatrick	Estate of Joan Fitzpatrick			3.00
							2,358.70
					Re	port WIP Totals :	2.358.70
	08/05/2004 31/01/2012 02/12/2005 24/05/2011 11/12/2013 02/05/2012 01/01/2010 23/09/2010 03/06/2010	Started         Date         Matter           Carol Nolan         09/06/2004         ABB00           31/01/2012         ABB00         02/12/2005         BE S00           02/12/2013         KEL00         02/06/2011         FIN001           11/12/2013         KEL00         02/06/2012         L.OW00           01/01/2010         QUI00:         SHA00           03/06/2010         20/04/2009         QUI00:	Started         Last Bill Date         Matter         Client           Carol Nolan         Carol Nolan         08/05/2004         ABB001/0001         Georg 31/01/2012         ABB002/0002         Abbey 20/202005         BES001/0001         Busin 24/05/2011         FIN001/0002         Finant 11/12/2013         KEL002/0001         Sarah           20/05/2012         LOW001/00002         Finant 11/12/2013         Curver 10002         Finant 20/05/2012         LOW001/00003         Lower           01/01/2010         QUI002/0001         Nial C 23/09/2010         SHA001/00003         John S           03/06/2010         20/04/2009         QUI001/0005         Alan C	Started         Last Bill Date         Matter         Client Name           Carol Nolan         Carol Nolan         08/05/2004         ABB001/0001         George J Abbott           31/01/2012         ABB002/0002         Abbey & Procter         02/02/2005         BE Sol/0001         Business Time Limited           24/05/2011         FIN001/0002         Finance Department         1/1/12/2013         Sarah Kelly           20/05/2012         LOW001/0003         Sarah Kelly         Sarah Kelly         Sarah Kelly           20/05/2010         QUI002/0001         Niall Quinn         Sarah Xelly         Sarah Kelly           03/06/2010         QUI001/0005         Alan Quinn         Carah Quinn         Carah Quinn	WIP for Fee Earner by Last Bill Date           Started         Last Bill Date         Matter         Client Name         Description           Carol Nolan           D8/05/2004         ABB001/0001         George J Abbott         Sale 45 Somserset Road, Dublin 6 31/01/2012         AbB001/0002         Phone Sime Field Share Holding Agreement Business Time Limited         Lease of Unit 33, Eastgate Avenue 24/05/2011         FIN001/0002         Finance Department Share Kellow Puevelopments         Damages - 21 Main Street           20/05/2012         LOW001/0001         Sarah Kelly         Purchase of Property Estate         Sale 45 Nones Trust           01/01/2010         QUI002/0001         Nial Quinn         Accident at work 23/09/2010         SHA001/0005         Alan Quinn         Sale of 12 Main Street, Bray, Co. 1	WIP for Fee Earner by Last Bill Date           Started         Last Bill Date         Matter         Client Name         Description           Carol Nolan           08/05/2004         ABB001/0001         George J Abbott         Sale 45 Somserset Road, Dublin 6           31/01/2012         ABB001/0002         Abbey & Procter         Share Holding Agreement           02/02/2005         BE S001/0001         Sale of Somserset Road, Dublin 12.           24/05/2011         FIN001/0002         Finance Department         Damages - 21 Main Street           01/02/2013         KEL002/0001         Sarah Kelly         Purchase of Property           02/05/2012         LOW001/0003         Joint Shaw         Jones Trust           03/06/2010         20/04/2009         QUI001/0005         Alan Quinn         Sale of 12 Main Street, Bray, Co. Wicklow           14/01/2011         30/05/2009         FIT001/0001         Scott Fitzpatrick         Estate of Joan Fitzpatrick	MiP for Fee Earner by Last Bill Date         Data Date : 1           Started         Last Bill Date         Matter         Client Name         Description         Client A/C           Carol Nolan           08/05/2004         ABB001/0001         George J Abbott         Sale 45 Somsenset Road, Dublin 6         (345,000,00)           31/01/2012         ABB002/0002         Abbey 8. Procter         Share Holding Agreement         0.00           02/02/2026         BE 5001/0001         Finance Department         Damages - 21 Main Street         0.00           24/05/2011         FIN001/0002         Finance Department         Damages - 21 Main Street         0.00           02/05/2012         LOW001/0003         Sarah Kelly         Purchase of Property         0.00           02/05/2012         LOW001/0003         Sarah Kelly         Purchase of Property         0.00           01/01/2010         QUI002/0001         Nial Quinn         Accident at work         (2,000,00)           03/06/2010         20/04/2009         QUI001/0005         Alan Quinn         Sale of 12 Main Street, Bray, Co. Wicklow         0.00           03/06/2010         20/04/2009         Fitzpatrick         Estate of Joan Fitzpatrick         Chargeable WIP           Non-Chargeable WIP         <

### My Top WIP

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

		Soo (	Grabbit & Runne		
	<u>T</u> (	op Work In Progre	<u>ess By Fee Earner</u>	Data Date : 10/0 F	8/2015: 9:42 ee Earner : Cl
			Including cl	hargeable and nonc	
Matter	Last Bill Date	Client Name	Matter Description	Client A/c	WIP
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
LOW001/000	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
LOW001/000		Lowery Developments	Receivership - Nama Properties No 2 Sandyford Estate	(925.00)	225.00
LOW001/000		Lowery Developments	Receivership - Nama Properties - No 81 Sandyford Business Park	(925.00)	192.00
LAW001/0001		Liz Lawlor	Advice re Inheritance tax	(5,000.00)	147.00
BRO002/0001		Thomas Brolin	Legal Advice re Repatriation	(200.00)	110.00
SHA001/0003		John Shaw	Jones Trust	0.00	49.50
TAL001/0001		Deirdre Talbot	Drunk Driving Arrest - 6th September 2009	0.00	42.50
SIM001/0001		Bart Simpson	Sale of House at: 4 The Mews, Rathfarnham, Dublin 6	0.00	25.50
LAW002/0001	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.



For Fee Earner : Martina Winters (MW)							Soo Grabbit & Runne			
Time Recording (Hour	s) Fees Issued by Month			- 1496	Fees Year To Date					
15 128 160 160 160 160 160 160 160 160 160 160	22 28 24 30 16 12 12 4				1298 1298 1008 - 008 - 038 - 438 238					
Monthly Time Recorded Ave Budget From 01052316 Mon To 319562016 Y	they	Badget	Actual May	Actual Apr	08	Burget	Garment YTD	Last Year YTD		
Fees Issued May	30,972		Fees	Issued Y	TD (Jan	2016)	35,	792		
Fees Issued Apr		0	Fees	Issued L	ast Year	To Date		11,492		
Outstanding Fees Outstanding Invoices	78,423 96,080					r 60 Days Wer 60 Da	ays	73,423 89,731		
No. of Draft Involces 2			Value of Draft Invoices			2,4	2,460			
Recorded Hours (01/05/2016 - 31/05/2016 ) No. of Unposted Time Entries	0Hr Time Ana 3	s 00mins Ilysis	WIP k	Inbilled ess Draft yValue		Date	WIP	46,215 43,755 ByClient		
Open Matters/Cases	67		No. Matters/Cases Opened (01/05/2016 - 31/05/2018 )		0	1				
Active Matters/Cases Active Cases with no Section	22			atters/C:		ened YTD	2			
No. Cases With Statute	2		No. C	ases Wi	h Statute			2		
No. Undertakings Not Dischar	ged0		No. U	ndertaki 18/05/2016	ngs Not E	Discharge	d O	L.		
No. Overdue Actions	115		No.To	tal Actio	15		11	9		
No. High Priority OS Actions	26			tionsBy0	Catagory					
* Click on the values (Blue/Red) for i	Detailed Drill	down								

# **Chapter 13: Accounts**

## **Account Functions in the Case Diary**

### View the Matter Ledger

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

O Critical Information         03 Jul 2011         5012368         Pd Brady & Co Search Fees         55	Hom	ne Case Reports	Phone Log Maintain Setup	Help			
Accounts       A/c tadger         Client/Case       Case:       IBS001/0019       Image: IBS001/0019         Case Diary       Image: IBS001/0019       Image: IBS001/0019       Image: IBS001/0019         Current Case Dialis       Search       Image: IBS001/0019       Image: IBS001/0019         Current Case Details       Date *       Ref       Narrative       Billing A/c       Outlay A/c         Softer Case Details       Image: IBS001/0019		_					
	Print	Accounts			ger		
[©] Document Manager [©] Current Case Details [©] Current Case Details [©] Other Case Details [©] Other Case Details [©] Other Case Details [©] Aref [©] Aref [©] Aref [©] Aref [©] Other Case Details [©] Other Case	<u> </u> Clier	nt/Case	Case: IB5001/0019				
Search       Search         Date *       Ref       Narrative       Billing A/c       Outlay A/c         Other case Details       * 30 Jun 2011       pc       Pd Registered Post       0       0         * Associates       03 Jul 2011       5012368       Pd Brady & Co Search Fees       0       05/00         * A/c Ledger       *       *       *       Pd Commissioner for Oaths swearing affidavit of debt       0       4/d         * A/c Ledger       *       *       *       *       *       *       *       *         * Time Ledger       *       *       *       *       *       *       *       *       *       *         * Debt Ledger       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       *       * <td>📕 Case Di</td> <td>iary</td> <td></td> <td></td> <td></td> <td></td> <td></td>	📕 Case Di	iary					
Other Case Details     Date     Net     Nation       Image Action     30 Jun 2011     pc     Pd Registered Post     Image Action       Image Action     Image Action     0 Jul 2011     5012268     Pd Brady & Co Search Fees       Image Action     Image Action     Image Action     Image Action     Image Action       Image Action     Image Action     Image Action     Image Action     Image Action       Image Action     Image Action     Image Action     Image Action     Image Action       Image Action     Image Action     Image Action     Image Action     Image Action       Image Action     Image Action     Image Action     Image Action     Image Action       Image Action     Image Action     Image Action     Image Action     Image Action       Image Action     Image Action     Image Action     Image Action     Image Action       Image Action     Image Action     Image Action     Image Action     Image Action       Image Action     Image Action     Image Action     Image Action     Image Action       Image Action     Image Action     Image Action     Image Action     Image Action       Image Action     Image Action     Image Action     Image Action     Image Action       Image Action     Image Action <td>-</td> <td>-</td> <td>Search</td> <td></td> <td></td> <td></td> <td></td>	-	-	Search				
• Associates         • 30 Jun 2011         • pc         • Pd Registered Post         • Of Registered Post         • Pd Registered Post         • Pd Registered Post         • Of Registered Post         • Pd Registered Post         • Of Re			Date ⁹	Ref	Narrative	Billing A/c	Outlay A/c
Image: Application of the system of the s			> 30 Jun 2011	pc	Pd Registered Post		5.50
A/c Ledger     Ime Ledger     Debt Ledger	Critical	Information	03 Jul 2011	5012368	Pd Brady & Co Search Fees		57.50
Ime Ledger       Debt Ledger			12 Jul 2011	pc	Pd Commissioner for Oaths swearing affidavit of debt		40.00
Debt Ledger	📓 A/c Led	lger					
	📓 Time Le	edger					
Reserve Ledger	🙀 Debt Le	edger					
	🙀 Reserve	e Ledger					
Undertakings	😃 Underta	akings					
	Strong	RADE	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~			

**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 Balan	ce Report	×
Enter Repor	rt Criteria	
From Client Code (Blank for all)	~	
To Client Code (Blank for all)	~	
As At Date	04 May 2016	
Minimum Value (0 for All)	0	
Open or Closed Matters	Open 🗸	
Show Details	$\checkmark$	
	Bun	Close
	Run	Close

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

#### How to set a reserve amount

- 1. **Open** a case in the Case Diary.
- 2. Click on **A/C Ledger** on the Case Diary Navigation panel.
- 3. Click on **Set Client Reserve** on the Home tab, and the following screen will appear.

	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.

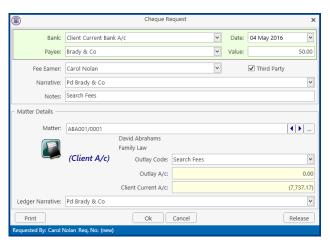
### How to add a comment

- 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<br/>from the drop-down list.
  - Date: Today's date will be shown by default. Change as necessary.
  - Payee: Input the Payee's name or select from the supplier drop-down list.
  - Value: Input the amount of the cheque.



- **Fee Earner**: This will default to the current fee earner. Select a different fee earner from the 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.
- NotifyCheck this box if you want an email to be sent to the Accounts Department when theRelease: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

- 1. **Open** a case in the Case Diary.
- 2. Click on A/c Ledger on the Case Diary Navigation panel.
- Click on Draft Invoice on the Home tab while in A/c Ledger. A Draft Invoice screen will appear.
  - **NOTE:** The current balances on the matter are displayed on the right of the screen.

Message:	Input a message for the
	Accounts Department (optional)
Type:	Invoice will be checked

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

٢		Dr	aft Invoice				□ ×
V Ok	Message:						
Cancel	Request Type: O Cre	idit Note 💿 Invoice	Open Invoice	🗌 Bill Sent	Invoice / Bill	No: (no	t invoiced)
Cancer	Matter Details						
	Matter:	ABA001/0001	David Abr	ahams		Bills:	590.40
	Handler:	Carol Nolan v				Outlay:	0.00
	Description:	Family Law				harges:	(7,737.17) 278.50
Choose report	Date:	04 May 2016	Transfer To Pay		Time (HE		1:37
Bill Layout	Bill To:	David Abrahams 123 Mayfair Street Dublin 2					1.57
- Print Copy	Our Ref:	CN	Your Ref:				
	Write down Time to:	04 May 2016 🔍					
	Invoice Details Fee	Earner Breakdown					
	Type Narrative		Net	VAT Value	Fee Earner		
Release							^
Create FNL		Rig	ght-Click fo	r Options			
Billing Guide							,
Matter Ledger	Fees: 0.00 Outlay: 0	0.00 Miscellaneous Fees:	.00 VAT: 0.00			Bill To	otal: 0.00
Requested By: Carol Nole	n Draft Number: (new)						

- **Open Invoice**: Check the box to create an open invoice.
- **Bill Sent**: This box is to be checked when the bill is actually sent.
- Matter:This will default to the current case; to change the case click on the browse<br/>button to bring up a matter list and double-click the required case.
- **Description**: This will default to the matter description to amend click in the input box provided and amend.

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

- **Transfer to Pay**: If this is checked, funds will be transferred from the client account to pay the bill.
- Bill to:The client details will be shown by default, but the name<br/>and/or address may be changed. Click the Client button to<br/>revert to the client details.

-	-		
C	IP	nt	

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

See Chapter 12 (p. 122), 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.

	_						
📥 🧷 🐭 🕼							
T 🗸 🔶 🚽							
Add Edit Delete A/c Le	edger						
Bill Requisitions							
Search/Open	Carol Nolan	~					
🖡 All Matters	Search						Draft Invoices
Recent Matters	Matter Code	Bill Date	Addressee	Address	Type	Total	Draft No.
My Contacts	GLE001/0001	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	0.00	26
🞗 Advanced Search	GOR001/0001	15 Nov 2014	Noreen Gorman	22 North Circular Road Dublin 2	I	178.67	26
🖗 My Invoices	GRE002/0002	15 Nov 2014	Roger Greene	33 Main Street Cork	I	774.90	26
My Cheques	GLE001/0001	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	1,143.36	26
Phone Log	GLE001/0002	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	4,981.50	26
Strong Room	BLA001/0001	29 Oct 2014	Gordon T. Black	23 Ellis Park, Rathmines, Dublin 6.	I	0.00	26
Document Search			N				
			G-				

## 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. 145 above.

### How to Edit a Draft Invoice

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

٢					D	raft Invoice				
<b>√</b>	Ok	Message:								
*	Cancel	Request Ty	pe: 💿	Invoice	Open Invo	ice 🗌 i	Bill Sent		Invoice / Bill No: (	not invoice
~	concer	Matter De								
			Matter:	ABA001/0001			David Abrahams		Bills	
			Handler:	Carol Nolan	v				Outlay	
		D	escription:	Family Law						: (7,737.1
Choose	raport		Date:	04 May 2016	¥	Transfe	r To Pay		Charges	
Bill Layo			Bill To:	David Abraham	5				Time (HH:MM)	: 1:3
biii Cayo		123 Mayfair Stro Dublin 2	eet							
₩.	Print Copy		Client Our Ref:			Your Ref:				
		Write dow		04 May 2016	v	rour ver.				
		Invoice De		Earner Breakdow						
		Type	Narrative	carrier breakdow	m		Net	VAT Value	Fee Earner	
_		F F	Professio	nal Eee			500.0		Carol Nolan	
J	Release	0	Search Fe				50.0		Carol Nolan	
		M	Photocop	ying of Brief			45.0	0 10.35	Carol Nolan	
71	Create FNL									
and the second s										
-										
	Billing Guide									
	latter Ledger	Feer 600	00 Outlour	50.00 Miscella	DODUS FOR		AT. 125.25		Dill Te	tal: 720.

### 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.

Wiew Report		Dagte (1 Account. Acc)	Comparison, No. 40	Married Hold -	- • ×
DOC LPD	F				
····	the text to find <				
Print		INVOICE			^
		DRAFT			
	Charlie Gleeson			15 Nov 2014	
	South West Georges Street Dublin 2				
	Account Ref: GLE001/0001		Our Ref:	JP	
	Invoice No: 0		Your Ref:		
	Lease of South West Georges Street		Not Liable	Liable	
	-		to VAT €	to VAT €	
	Attendance on client			600.00	
	Letter to client re instructions and section 68 letter			95.00	
	File Review re counsels fees and our fees			42.50	
	Letter to Noel Common SC		5.60	187.50	
	Pd Registered Post - letter to Landlord		5.60		
					5
	E&OE	SUBTOTALS	5 60	925.00	
	9	25.00 @ 23.00 % VAT	5.00	212.76	
		-			
	Add to	tal not subject to VAT		5.60	
		INVOICE TOTAL:		1,143.36	

# **Credit Notes**

If a Credit Note is required, please contact your Accounts Department. Credits notes will have an impact on all billed time related to the original invoice regardless of the value of the credit note.

۲
🗸 Ok
Cancel
Choose report
Bill Layout
Print Copy
Release
Create FNL
Billing Guide
Matter Ledger

0.00

**()** 

Y

~

Release

# My Cheques

Date:

Payee:

Value:

Fee Earner:

Third Party:

### 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.

Input the Payee's name or

select a supplier from the

Input the amount of the

fee earner from the drop-

down list if required.

party cheque.

drop-down list.

cheque.

- Today's date will be shown by default; change as required. Bank: Petty Cash Date: 10 May 2016 ✓ Value: Payee: Donald Duck Fee Earner: Carol Nolan 4 Third Party Narrative: Pd Donald Duck Notes Client Payment EFT Matter Details Matter: (Outlay) This will default to the current Outlay Code fee earner. Select a different Outlay A/c Client Current A/c Once Off Payment Ledger Narrative: Pd Donald Duck Ok Cancel Check the box if this is a third
- Narrative: Input a cheque narrative or click on the down arrow to pick from a list of narratives.
- **Input** a note to the Accounts Department if required. Notes:
- **Cheque Payment:** Tick box if Payee is to be paid by cheque
- EFT: Tick box if Payee is to be paid the Electronic Funds Transfer
- Matter: This will show the current case. To select a different case, click on the browse button for the matter list and **double-click** the required case.
- Notify Check this box if you want an email to be sent to the Accounts Department when the Release: 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 Repor	ts Phone Log Maintain	Setup Help					
Add Edit Delete A/c Led Cheque Requisitons							
Search/Open	Carol Nolan	¥					
🔰 All Matters	Search						Standard Vi
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 14: The Debt Ledger**

## How to View the Debt Ledger

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

# How to add the original debt

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

Case: FLY001/0001	•••	Jack Flynn Sale of 10 Rose Lawn, Blancl	hardstown, Dublir	n 17											01-569 7412 CN
Original Debt Amount	0.00				Total Collected To-date 0.00						P	ost Payment			
Interest To-date	est To-date 0.00 Post Interest														
Recoverable Cost To-date	0.00	Post Costs									Outstand	ling	0.00		
Start Date 12 Feb 2016		Record No						(	Comments:						
Your ref		Matter Status													
User3		Charge Arrangement NIL													
Matter Code	Date	Description	Method	Туре	Payment	Principal Paid	Interest Paid	Cost Paid	Interest Due	Cost Due	Remitted	Held Date	Posting Ref	Reference	
															^

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

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

## How to Post a Payment

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

### 2. Click Post Payment.

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

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

			Post p	ayment		×
Payment Prop	erties Allo	cation				
Matter Code	IBS001/000	01				
Date	04 May 20	016	¥	Transaction Date	04 May 2016	~
Reference	1425					
Туре	Direct Pay	yment	~			
Payment Metho	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 pay	yments				
					Save	Cancel

**Date**: The date will default to today's date; amend if required.

Type: Select the payment type from the drop-down list.

Payment Method: Select the payment method from the drop-down list.

Value: Input the amount of the payment.

**Principal Paid**: Input the amount of the payment to be allocated to the principal.

Principal Status: Select the Principal Status applicable from the drop-down list.

**Costs Paid**: Input the amount of the payment to be allocated to costs.

**Costs Status**: Select the **Cost Status** applicable from the drop-down list.

**Interest Paid**: **Input** the amount of the payment to be allocated to interest.

Interest Status: Select a status from the drop-down list.

**Description**: Input a description for this payment.

		Post payment	×
Payment Pr	operties	Allocation	
Entry Date	13 Jun	2016	
Enter By	CN		
Posting Ref	45		
Remitted			
Date Remitte	d Please	select date	
Held Date	Please	select date	
	Bour	ced	
		Save	Cancel

Entry Date:	The <b>date</b> will default to today's date.
Enter By:	The <b>handler code</b> will be entered by default.
Posting Ref:	The next <b>reference</b> in the sequence will appear.
Remitted:	Automatically populated.
Date Remitted:	Enter the <b>date</b> the payment was received
Held Date:	Used for the Revenue Module only.
Bounced:	Tick if the payment is returned unpaid by the bank.

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

**NOTE:** Allocation relates to the Revenue Module only.

# **How to Post Interest**

1. Click on **Post Interest**.

	Post Interest X	
Calculate Interest	Based On The Following	
	Monthly	
Rate at	5.00%	
From	01 Jan 2016 V To 31 Mar 2016 V	
On	1700.00	
Description	1st Quarter	
Calculate Interest	255.00	
	<u>Save</u>	

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 Post Recoverable Costs

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

	Post Costs	×
Matter Code	IBS001/0001	
Date	04 May 2016 Charge Cost To Client	
Costs	100.00 Client Charge 50.00	
Description	Fees	
	<u>S</u> ave <u>C</u> ancel	

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** Check the box if the cost is chargeable to the client **to Client**:

**Client Charge:** Input the amount of the cost chargeable to the client.

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

## How to Amend an Entry

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

## How to Print a Debt Ledger Report

- 1. Click on **Debt Ledger** on the **Case diary** navigation panel.
- 2. Click on **Print** on the Home tab. The following dialogue box will appear.
- 3. Click on the Run Button a report will be generated see the following example.

	Debt Costing Ledger Enter Parameters	×
Matter	IBS001/0001	
		Run

Bec The Fire & A						View Report				
Carlor 🔍 There has no have a strate and the Carlor										
					Debt (	Costing Le	edger			
		Matter Original Det Recoverable			181001.00 50,000 60	00 Debt inte	rest to Date	ness Sennos	H LN	2,652.05 5,500.00 47,112.05
	1	Date	Method	Туре	Value	Prenium Pard	Costs	Costs Pard	interest	Interest Part
		26/06/2008		Costs	0.00	0.00	60.00	0.00	0.00	0.00
			Cheque Cheque	Receipt	6,000 00 600 00	6,000.00	0.00	0.00	0.00	0.00

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

# **Chapter 15: The Reserve Ledger**

The reserve ledger is used in 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	r ason1,0020													Tel: C	01-6677		
Case Diary		Gary Neville - Short term Ioan													F/e: E	IS		
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 Con	nment
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	0.00	20,000.00	0.00	10,000									
	08 Aug 2013	50,000.00	0.00	0.00	20,000.00	0.00	20,000.00	0.00	10,000									
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

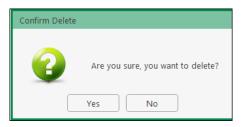
- 1. Click Reserve Ledger on the Case diary Navigation panel.
- 2. Select the **entry** you want to edit, then click **Edit** on the Home tab. The **Reserve Ledger Insert** dialogue box (see above) will appear.
- 3. Make the required changes.
- 4. Click **OK** to save the changes.

## 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 16: Phone Log**

# Viewing, Searching and Sorting the Phone Log

### How to view the Phone Log

- 1. Click on Search/Open on the Navigation bar.
- 2. Click Phone Log on the Navigation panel.

D					Keyhouse (	Case Management (CN - Carol Nolen - 09:06 / 00:00)	Quick Search (Ctrl + Q)
Home Case Reports	Phone	.og Maintain Set	up Help				
thone Log Add Add to C		Delete					
Search/Open	Search						Standard View
		Case Code	Date	Name	Who	Message	Description
All Matters	14	TJF001/0001	06 Jul 2015	TJ Fox	AM	Caller: PTSB - Branch Manager Branch Manager called to say a payment was receiu.	Outstanding debt to PTSB Bank.
My Matters	1	TJF001/0001	06 Jul 2015	TJ Fox	CN	Spoke with solicitors for the Building Society to try and arrange a payment plan. T	Outstanding debt to PTSB Bank.
Recent Matters	1	BRE001/0001	03 Jul 2015	Mike Breeze	CN	Caller: Mike Breeze Wants to discuss settlement options with Defendent. Wants to	Broken left leg.
Contacts	1	FLY001/0002	03 Jul 2015	Jack Flynn	CN	Caller: James Bay Draft Contracts are ready for review.	Purchase of 16 The Haywain, Terenure, Dublin 6
Associates		SIM001/0001	02 Jul 2015	Bart Simpson	CN	Called client to remind him to send back the papers	Sale of House at: 4 The Mews, 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	AlG001/0002	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	85	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
	1.1.1	A88002/0001	27 Mar 2014	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							
F	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
1	TJF001/0001	06 Jul 2015	TLEOX (Blanks)		Caller: PTSB - Branch Manager Branch Manager called
$\checkmark$	TJF001/0001	06 Jul 2015	TJ Fox (Non blanks)		Spoke with solicitors for the Building Society to try and
$\checkmark$	BRE001/0001	03 Jul 2015	Mike E	d	Caller: Mike Breeze Wants to discuss settlement option
$\checkmark$	FLY001/0002	03 Jul 2015	Jack F Accord Music Wo	and all the state	Caller: James Bay Draft Contracts are ready for review.
$\checkmark$	FLY001/0001	02 Jul 2015	Jack F Allied Investment		Called client to remind him to send back the papers
	SIM001/0001	02 Jul 2015	Bart S Angela Beck	Group	Called client to remind him to send back the papers
	BES001/0002	03 Feb 2015	Busine Bart Simpson		Phone Call
$\checkmark$	BES001/0001	03 Dec 2014	Busine Bill Clinton		Phone Call to Harold Worth
$\checkmark$	NOL001/0001	04 Sep 2014	Paula Bob Murphy Georg Business Time Limited		test test
$\checkmark$	ABB001/0001	08 Aug 2014		nited	Telcon with etc etc
$\checkmark$	AIG001/0004	29 May 2014	Allied Charlie Gleeson		Sean enquired about third party cover. I informed him t
$\checkmark$	AIG001/0003	29 May 2014	Allied Chow Ming Zhan	g	Frank phoned Claims team to follow up on file details
$\checkmark$	AIG001/0002	27 May 2014	Allied Claire Bourke		Alan phoned regarding uncompleted claims form
$\checkmark$	BEC001/0006	20 May 2014	Angel: David Abrahams		Phone lender for redemption statement - Any note
$\checkmark$	DUG001/0001	19 May 2014	Paul D David Bloggs		Phone buyers' solicitors, check buyers' full names
1	BLO002/0001	19 May 2014	David		Phone lender for redemption statement
-	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				
Ι	▶ Who: AM										
	▶ Who: BS										
	▶ Who: CN										
▲ Who: JP											
🖌 🚦 В		2	BOU001/0001	Claire Bourke	24 Oct 2010		Telephone Attendance				
1	-		BOU001/0001	Claire Bourke		17 Jul 2010	Telephone Attendance				
Ī	1		SMI001/0001	Smith & Green		20 Jan 2011	Caller: john smith - harry rang re contracts				
▶ Who: MK											
T	▶ Wh	o: N	IW								
t	▶ Wh	o: S	ĸ								

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.

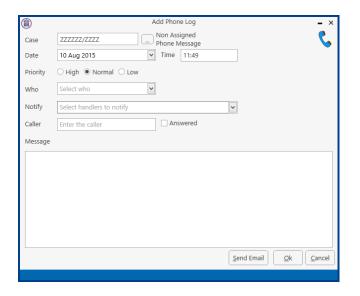
6	Vho		5	Group Panel
		-		Full Expand
				Full Collapse
►	•	WI	₽↓	Sort Ascending
	►	WI	Z↓	Sort Descending
	►	WI	A∦ Z¥	Clear Sorting
	►	w	<b>-</b> ×	Ungroup
	►	w	-	Hide Group Panel
	►	w		Show Column Chooser
	►	w		Best Fit (all columns)
				Group Summary Editor
			Ŷ	Filter Editor

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.



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<br/>connected with a case. To select a case click on the browse button and search for<br/>the required case.
- **Date/Time**: This will show the current date and time; amend if required.

<b>Priority</b> :	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: Lo - <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 17: Closed Cases**

# How to Search for Closed Cases

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

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

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

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

### How to reopen a closed case

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

١			Current Case Details					
Client Code	z00001	Description	Share Agreement					
Matter	0001							
Matter A	dmin Case Ass	ociate Archiv	ve Billing Details	Permission	Transaction	Linked Cases		
Closed date	e 03 Sep 2009 🗹	Closed						

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

	Closed Cases
Viev	1
Open Cases	
Closed Cases	
Open and Closed Cases	

## How to close a Case

Before archiving a matter ensure that all balances are nil, all time is posted to the time ledger and all tasks in the case diary are marked as complete.

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

٦					Current (	Case Details				×
	Client Matte	t Code [ er [	FLY001 0002	Description	Terenure, Dubl	in 6				
Ma	atter	Admin	Additional Details	Case Associate	e Archiv	ve Billing Details	Permission	Linked Cases		
Fe	ee Earr	her	Carol Nolan		~	File Ref	FLY002/001			
S	ecretar	ry	Anne Mellon		~	[	Enter			
P	artner		Stephen Keogh		~	[	Enter			
D	epartn	nent	Conveyancing		~	[	Enter			
w	Vork Ty	/pe	Purchase		~	[	Mark as Important Statement			
0	ld Ref	erence	FLY001/001		Branch		Dublin Office		~	
	Case P	lan & Stat	us							
	Case I	Plan/Type	Property Purchas	e	▼ File Colour		Select file colour		✓ Clear	
	Case Status		Loan approval received		~	Record No	Enter record no			
File	Numb	er:362							ОКСа	ncel

6. Select the Archive Tab. This will be greyed out if you don't have the required permissions.

### 7. Check the box marked **Closed**.

		(	Current Cas	e Details				×		
Client Code Matter	FLY001 [	Description Pu	rchase of 16 The Haywain, Terenure, Dublin 6							
Matter Admin	Additional Details	Case Associate	Archive	Billing Details	Permission	Linked Cases	]			
Date File Closed Location Archive Location			<b>v</b>							
File Barcode No Box Barcode No										
Expected Destroy Actual Destroy Da			<ul><li></li></ul>							
Destroyed by	Select fee e	earner	~							
File Number:362							<u>o</u> k	Cancel		

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 18: The Brief Wizard**

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

## Important Steps for preparing your Brief

- 1. Review your documents in the **Document Manager** and ensure the necessary files are classified and the Document Date is correct as it will be in your brief. See **How to reclassify Documents** and **How to change the Document Properties** (p. 80)
- 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. 77 above) for details on how to rename and reclassify a document.

If you need assistance adding **Document Classes** please contact your Keyhouse administrator or <u>support@keyhouse.assist.com</u>

## **Assembling a Brief**

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

	rts Phone Lo	og Maintain Setup Help				house Case Management					Quick Search (Ctrl + Q)
rint Export to PDF Sta	art Timer Post Accounts	Time Properties Reclassify Emuli Document(s)	rief Preview								
Client/Case	Case: BAR	$\sim$									Tel: 01-5
Case Diary			iigh Street, Kells, Co N	/leath							F/e: CN
Document Manager	Search	h Search tex	t								Standard View
Current Client Details	Type	Ø Document Name	Diary Date	Version	Date 💌	Document Class	Source	From	То	Subject	File Location
Current Case Details	6	afdafd	30 Nov 2015	1	30 Nov 2015	General	Case			Test Doc	t:\keyhouse\client documents\BAR002\0001\afdafd_
Other Case Details	E.	Letter to Client Re Sale	30 Nov 2015	1	30 Nov 2015	General	Case			Test Doc	t:\keyhouse\client documents\BAR002\0001\Letter t
ssociates ritical Information	R	Letter to Bank re Redemption Value	30 Nov 2015	1	30 Nov 2015	Letters/Interparty Corr	Case			Letter to Bank re Redemption Value	t:\keyhouse\client documents\BAR002\0001\Letter t
now Your Client	Þ 🔁	Contract of Sale	30 Nov 2015	1	30 Nov 2015	Pleadings	Case			Contract of Sale	t:\keyhouse\client documents\BAR002\0001\Contra
now rour client	. 8	Contract for Sale Draft 2	30 Nov 2015	1	23 Nov 2015	Opinions	Case			Contract for Sale Draft 2	t:\keyhouse\client documents\BAR002\0001\Contra
Vc Ledger		Contract for Sale Draft 1	30 Nov 2015	1	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	23 Nov 2015	Letters/Interparty Corr	Case			Letter to Insurance Company	t:\keyhouse\client documents\BAR002\0001\Letter t
Pebt Ledger	<b>E</b>	Letter to Local Authority	19 Nov 2015	1	23 Nov 2015	Letters/Interparty Corr	Case			Letter to Local Authority	t:\keyhouse\client documents\BAR002\0001\Letter
leserve Ledger	<b>R</b>	Letter to Lending Institution	20 Nov 2015	1	23 Nov 2015	Letters/Interparty Corr	Case			Letter to Lending Institution	t:\keyhouse\client documents\BAR002\0001\Letter t
Undertakings	10	Letter to Solicitor	23 Nov 2015	1	23 Nov 2015	Letters/Interparty Corr	Case			Letter to Solicitor	t:\keyhouse\client documents\BAR002\0001\Letter 1
	- 6	Letter to Client	20 Nov 2015	1	20 Nov 2015	Client Letters	Case			Letter to Client	t:\keyhouse\client documents\BAR002\0001\Letter t
Strong Room											
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 Br	ief Wizard			×
<b>Meyhouse</b>			Brief Assembl Wizard	у
Using a Brief Template				
Brief Template	Туре	Sequence	Section	
Booklet of Title	4	-1	Interparty Correspondance	
Personal Injury Litigation	Ú.	3	Pleadings	
	<u> </u>	4	Reports	
Do not use a Brief Template	<			>
Cancel			Previous	ext

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

New Brief Wizard	×
Keyhouse	Brief Assembly Wizard
Populating the Brief	
O Do not copy any documents into the Brief	2
<ul> <li>Copy documents into the Brief when their Class matches a Brief Section</li> </ul>	2
<ul> <li>Copy all documents into the Brief and create Sections as required</li> </ul>	2
* You can manually Drag and Drop documents listed under "Not included in this Brief" into your Brief after completing t	the Assembly Wizard
Cancel	Previous Next

- 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.

 $^{\textcircled{W}}$  Tip: for further information on each option click the question mark icon beside it.

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

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

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.

New Brief Wizard ×						
	) Keyhouse	Brief Assembly Wizard				
Ready	v to create Brief					
	Action					
	Do NOT copy the most recent Brief for this Case	·				
✓	Use Brief Template: Personal Injury Litigation					
✓	Copy Case Documents into the Brief if the Brief contains a Section that matches the Document Class					
✓	Brief Title: Brief for Beeblebrox v Dublin Bus					
	Brief Author: Brian Sweeney					
Car	Cancel Previous Finish					

7. When you are satisfied, click Finish.

		Keyhouse Case Management (CN - Carol Nolan - 04:24 / 03:06)	
Home Case Repor	s Phone Log Maintain Setup Help		
Use Adobe PDF Viewer Show Preview		↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑      ↑	
Preview	Drag and Drop Brief Sections Brief Templates	Ins bier	
Client/Case	Case: FLY001/0001		
Case Diary	Sale of House at: 4 The Mews, Rathf	arnham, Dublin 6	
🖉 Document Manager	Brief: Brief for Sale of House at: 4 The Mews Rathfarnham Dublin 6		Brief Sections
🚴 Current Client Details			
🍮 Current Case Details	Search		
Other Case Details	Type Document Name	Clas	ss Document Action Pri Action Type
Associates	Section: 001 - Client Correspondence (3 documents)		^
<ol> <li>Critical Information</li> </ol>	Section: 002 - Letters/Interparty Correspondance (9 documents)		
A/c Ledger	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:

Home Case Reports Phone Log Maintain Setup Help												
<u></u>	<ul><li>✓ Use Adobe PDF Viewer</li><li>✓ Show Preview</li></ul>	□ Stay in original section	+ Add Name Delete		1			1	1	7		Open in Word
Start Timer Post Time				Create	List	New Brief	Open Brief	Re-order Brief	Properties	Finalise	(Re)generate	Open in Adobe
Accounts	Preview	Drag and Drop	Brief Sections	Brief Temp	plates				This 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.

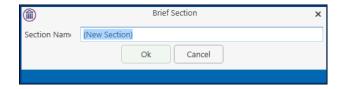
## How to amend a Section Name

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

0	Case: BE	001/0008							
		Beeblebrox v Dublin Bus							
D	def Date	an Banklahanna Duklin Rus		Brief Sectio					
	nei: brier	or Beeblebrox v Dublin Bus		Bhei Sectio	2				
[	Search			$\sim$					
	Туре	Document Name	Class	Document					
Þ	Sect	ion: 001 - Client Letters							
	Sector	ion: 002 - Documents							
	→ Sect	ion: 003 - Engagement Letters							
	► Sect	ion: 004 - Instruction Sheets							
	Section: 005 - Letters/Interparty Correspondance								
	► Sect	▶ Section: 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 for Beeblebrox v Dublin Bus Brief Se									
			Section		(=)				
P	Cove	r Letters			Pin to fix				
	Client	t Letters							
LU	Docu	ments							
	Lugagement Letters								
Instruction Sheets									
	Letters/Interparty Correspondance								
<u>u</u>	Mem	0							
	Motio	on papers							
	Docu	ments Not Included in this Brie	f						
Sea	rch								
Type Document Name		Document Name		Class	Document				
F 1	Sect	ion: 001 - Client Letters			^				
1	Section: 002 - Documents								
	Section: 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. 170 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	on?
•	Are you sure you want to delete Section "Cover Sheet"?
	Yes No

### 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. 170 above)
- 2. Select the **section** you want to move.
- 3. Use the buttons on the Right Click Menu to change the position of the section in the brief.



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

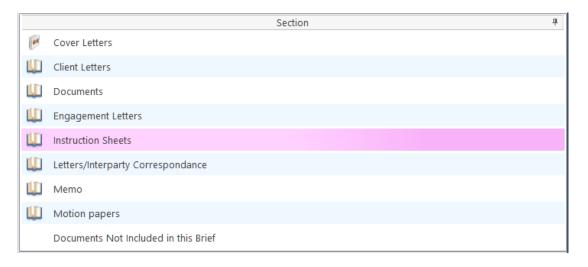
Move the selected section **up one position**.

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

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. 170 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).

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

### How to flag as a Cover or Main

- 1. Click Brief Sections on the right of the brief screen (see How to amend a Section Name, p. 170 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 X					
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	×
N	ew Br	ief Open Brief	(Right-click for Options)	
		Title	Description	
×		Brief for Sale of 2 Trinity	Brief for Sale of 2 Trinity Close, Rathgar, Dublin 6	^
L				~
			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.

	Brief Generation Wizard	×				
() Keyhous	е	Brief Generation Wizard		eyhous	f Generation Wizard	× Brief Generation Wizard
Print Quality     72 DPI - Suitable for Text documents     50 DPI - Text and Drawings     300 DPI - Photographs and fine/detailed drawings	As rendering the documents will demand a recommend that you choose the higher res really require detailed reproduction.		Pre-processing doc Current Section: Current Document:	uments. Please wait. Attendance Sheet Attendance Sheet		
Colour Depth Monochrome - plain text 16 bit - line drawings 256 bit - photographs True Colour - high def photographs	As rendering the documents will demand a recommend that you choose the higher col that really require detailed reproduction.		-			
Use Outlook to convert MSG files						

Check the box to use Outlook to convert MSG files.

- 5. **Click Next.** A screen will show the progress of the document preprocessing.
- 6. When pre-processing has been completed, you will have the opportunity to set the print order of the brief, the contents and position



of the footer and the alignment of columns in the table of contents.

- The documents in each Section may be printed in ascending date order, in alphabetical order by filename or in the order in which they were added to the brief while it was being assembled or maintained.
- The footer offset is the minimum number of lines that must be maintained between the footer and the physical end of the page.
- The options for page numbering in the footer are:
  - Page: Only the page number is shown;
  - Section – Page: The section number and the page number are shown;
  - Section Desc Page: The section number and description, and the page number are shown.

Page Numbering					
Page	R				
Page	-10				
Section - Page	H				
Section - Desc - Page	- 1				

1 line

1 line 2 lines 3 lines

4 lines

No offset

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

- You can set the footer font size and weight, or provide that there should be no footer.
- You may check the box to Left-Align the Table of Contents columns; if you leave the box unchecked, the page numbers will be right-aligned.
- 7. When you have selected the desired options for the print order of documents, the contents of the footer and the table of contents, click Next.

Print Order

8. You will now choose the type of output. The options are a Word document, a PDF, or both of these. You may also choose to produce a folder of documents instead of a single document.

Г	Select your Output	
	Produce a PDF Document (optimised)	¥
	Produce a Word Document	
	Produce a PDF Document	
	Produce both a Word and a PDF Document	

Order Documents as specified during Brief Maintenance Order Documents as specified during Brief Maintenance

Order Documents by File Date in each Section Order Documents by File Name in each Section

Produce a PDF Document (optimised)

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

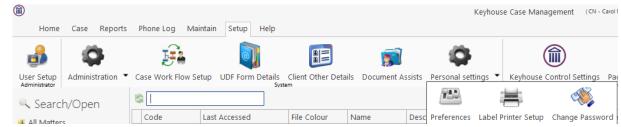
# Chapter 18 – Personalising your Keyhouse

# **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.

۱	Preference ×	Preference X
Main Application User Preferences Other User P	Preferences Views	Main Application User Preferences Other User Preferences Views
Show start up page Show notification to open case diary attachment Use enter in search boxes Launch alarm system at startup Allow spell check Show application closing prompt Disable animated images Scan capture rename the source file name	Ø	Remember Sync Document Name With Subject Line       My Briefcase       Book Case Associative Contact Details       Retain Last Matter Search       My Overview Settings       Budget Daily Hours (HH.MM)       0:00       O's Invoice Limit
Run local version Completed action ignore what's next prompt Font size adjustment	□ < > (100%) QK _ Cancel	Choose which has to shown first on preview panel in case diary Action Details  Document Preview SDLT XML path Allow focus to the top after completing an action QK Cancel
	Main Application User Preferences Other User Preferences V     View Pinning     Case Diary View Pinned by default     Case Documents View Pinned by default	Preference x iews

4. Among the options that can be set up are:

Main Application User Preferences	
Show Start up Page	

Use Enter in Search Box

Show Application closing prompt

This will give the user the Start up page which will allow the user to select the area of Keyhouse they wish to go to went the open the system i.e. Case/Open, Task or My Overview

This will require the user to click Enter to start a search after the key words have been entered

When the user click the X to close the system, a prompt will appear asking if the user wants to exit the system, log on as a different user or cancel.

Scan Capture rename the source file name	This will allow the user to rename a document in the scan capture folder with the name given to the document in Keyhouse.
Other User Preferences	
Remember Sync Document Name with	When you tick this box, it will allow you to automatically
Subject Line	rename a document if you change the name of an action and vice versa.
Show Case Associative Contact Details	This will allow the user to see any contacts within an associate on the Associates Screen on the Case/Matter
Retain Last Matter Search	To ensure that the Advanced Search screen keeps the last search entered, tick this box.
Allow focus to the top after completing an	To ensure that the curser stays at the top of the Case
action	Diary when an action is completed, tick this box.

#### Views

When a user changes the view on a screen the view will stay as the user moves from matter to matter until the user changes it again. On this screen the user can choose to have the screen revert back to the default view as they move from matter to matter.

5. 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. 🔲

# **Creating a View**

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

A Copy Case Mov	maintenance	Case Import	Search GoTo												
Search/Open	8													Open Ca	ses 🗌
All Matters	Code BAR002/0001	Last Accessed	File Colour	Name	Description	Fee Code		File Ref	User2	User3	Started	Department	Work Type Sale	Original Closed Date	
My Matters		21 Jan 2016 14:27:05		Kevin Barrett		CN	Carol Nolan					Conveyancing			
Recent Matters Contacts	FLY001/0001 ABB001/0005	21 Jan 2016 14:16:23 17 Dec 2015 11:27:55		Jack Flynn	RTA on Ferrybank Duel Carrageway	CN BS	Carol Nolan Brian Sween				23 Dec 2015	Litigation	Accident		
Associates					RTA The Rise, Stillorgan						23 Sep 2010	Litigation			
Advanced Search	BEC001/0001 BLA001/0001	30 Nov 2015 16:42:16 20 Nov 2015 14:34:32		Angela Beck	Sale of 56 Church Street, Rathgar RTA Walkinstown Crossroads, G. Black	BS BS	Brian Sween Brian Sween				11 Jan 2007	Conveyancing	Unknown Wor Road Traffic		
My Invoices		02 Sep 2015 12:41:34		Dunnes Store		BS	Brian Sween	12341			08 May 2010	Litigation General	Accident		
My Cheques	DUN001/0001 ODW001/0001	02 Sep 2015 12:41:34 02 Sep 2015 11:59:04		Sean O'Dwyer	Re-mortgage 54 Wellington Road Dublin		Justin Phelan				16 Feb 2015 14 Jan 2011	Conveyancing	Re-mortgage		
Phone Log	IBS001/0024	02 Sep 2015 11:59:04 02 Sep 2015 10:59:40		Interim Busine		BS	Brian Sween				22 May 2012		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 12:10:54		Laura Smyth	Laura Smyth y 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		6666666			04 Sep 2013	Debt	Circuit Court		
Template Library	ZZT001/0000	28 Aug 2015 12:37:33		Test New CLie.		SK	Stephen Ke	000000			27 Mar 2010	General	General		
	EVA001/0002	14 Mar 2014 09:02:49		Evans & Co.	Commercial Lease - Unit 2 Cedar Hall	JP	Justin Phelan				20 Aug 2010	Commercial	Lease		
	ZZZZZZ/ZZZ2	14 Mar 2014 09:02:49		Non Assigned	Dictation	BS	Brian Sween				20 Aug 2010 22 Dec 2005	Commercial	Accident		
	BLO001/0004	14 Mar 2014 09:00:32		Joe Bloggs	Commerical Work	SK	Stephen Ke				07 May 2004		Lease		
	AAA002/0002	14 Mar 2014 09:00:32		AAA Worldwi		BS	Brian Sween	PEE1			14 Aug 2013		Advice		
	FIN001/0003	14 Mar 2014 08:59:51		Finance Depa		BS	Brian Sween	TALT I			25 May 2011		Debt Collection		
	FIN001/0001	14 Mar 2014 08:59:47			Water Charges at 21 Main Street, Fingal	BS	Brian Sween				09 Nov 2011		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	632001	120056	49575566	02 Dec 2005	Finance	Purchase		
	AAA001/0001				Landlord Dispute	MW	Martina Win				06 Jun 2010	Litigation	Action		
	AAA001/0002				New Lease 44 Main Street Dun Laoghaire	MW	Martina Win				31 Jan 2010	Commercial	Lease		
	AAA001/0003				Slip and fall incident	CN	Carol Nolan				16 Feb 2015	General	General		
	AAA002/0001				Derek Bradley - export to USA Freight c	BS	Brian Sween				15 Feb 2012	Litigation	Action		
	ABA001/0001			David Abraha		AM	Anne Mellon				20 May 2011	Family Law	Action		
	[Closed] <> 'Y'	•													
	UDF Field														
	Search														
	Prompt				Value					Text					
Tasks	Purchase Price				275000					27500	10				
Search/Open															

2. Make the changes to the screen:

To remove a heading no longer required, click on the heading and drag it off the Header Row. To add new headings right click on the Header Row and select **Show Column Chooser**. All available headings for this section are list here.

Home Case Report	ts Phone Log Mi	aintain Setup	Help			K	eyhouse Case Mar	agement (C	N - Carol Nolan - 00.0	11 / 07:29)				Quick Search (Ctrl + Q) - 🗗 🗙
A Copy Case Mov	e Case Merge Case	2	Conflict Search Cese related	, р бото										
Search/Open	8													Open Cases 📰 🗧
All Matters	Code	Last Accessed	Nam	e	Description	∮↓ Sor		Earner	File Ref	Started	Department	Work Type	Original Closed Date	
My Matters	BAR002/0001	21 Jan 2016 14	:27:05 Kevir	Barrett	Sale of 1 High Street, Kells, C			ol Nolan		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	1:27:55 Geor	ge J Abb	RTA The Rise, Stillorgan	2\$ <u>Cle</u>		Sween		23 Sep 2010	Litigation	Accident		
Associates	BEC001/0001	30 Nov 2015 16	6:42:16 Ange	la Beck	Sale of 56 Church Street, Rat	🔁 Gro		Sween		11 Jan 2007	Conveyancing	Unknown Wor		
Advanced Search	BLA001/0001	20 Nov 2015 14	4:34:32 Gord	on T. Bla	RTA Walkinstown Crossroads	🔠 Sho	ow Group Panel	Sween	1234T	08 May 2010	Litigation	Road Traffic		
My Invoices	DUN001/0001	02 Sep 2015 12	:41:34 Dunn	es Store	Slip & Fall on Frozen Food A	Shc Shc	w Column Choose	r h Sween		16 Feb 2015	General	Accident		
My Cheques	ODW001/0001	02 Sep 2015 11	1:59:04 Sean	O'Dwyer	Re-mortgage 54 Wellington	E Rer	+ 52	n Phelan		14 Jan 2011	Conveyancing	Re-mortgage		
Phone Log	IBS001/0024	02 Sep 2015 10			IBS -v- Martin Smyth		it Fit (all columns)	Sween		22 May 2012	Debt	Debt Recovery		
Firm Undertakings	ACC001/0001	01 Sep 2015 12			Purchase New office 56 Seco			Martina Win			Commercial	Purchase		
Strong Room		01 Sep 2015 11			Laura Smith v Ine Ryme				smu001	01 Sep 2015		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.

Address	^
Close Date	
Closed [♥]	
File Colour	
File Number	
id 🔺	
Old Ref	
Phone No.	١.

5	R			
	Code	Last Accessed	Namehone No.	Description
►	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 ¹ in the top right corner of the screen.

		Open Cases
	View	
Open Cases		
Closed Cases		
Open and Closed 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 View Add View 🔇
	View	Default Shared
Open Cases		$\checkmark$
Closed Cases		
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		$\checkmark$
Open and Closed Cases		$\checkmark$
Open Cases		¥ ¥

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**

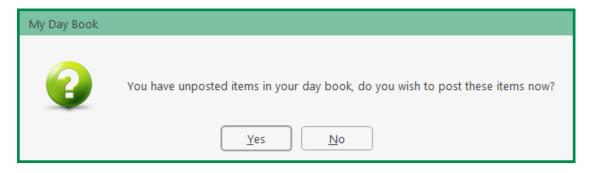
# **Closing Keyhouse**

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.