Keyhouse Case Management

User Manual





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Typographical conventions

Δ

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

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

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

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

Chapter 1: Getting Started

Opening Case Management

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

Please logi	Keyhouse
Handler: Password:	1
	Link this login to your Windows Login

- Once you have logged in, you will be presented with a choice of where to start: Recent Matters, Task Manager or My Overview
 - If you will always want to start in the same place, tick the box marked **Don't show this screen again**.
- 5. **Recent Matters** will allow you to view all your cases, with those most recently accessed at the top.



🔍 Search/Open	3	iearch					
All Matters		Code	Last Accessed	File Colour	Name	Description	Fee Earner
Recent Matters	Þ	BLA001/0001	28 Oct 2014 12:45:02		Gordon T. Bla	RTA Walkinstown Crossroads, G. Black	Brian Sweeney
My Contacts		BLA001/0000	26 Oct 2014 14:22:17		Gordon T. Bla	0000 Matter	Admin
Advanced Search		AAA001/0003	24 Oct 2014 12:06:55		AAA Securitie	Sale of 1 Main Street, Laragh, Co. Wicklow	Anne Mellon
		CUL001/0001	23 Oct 2014 10:52:07		Ann Marie Cul	Credit Card Debit	Carol Nolan
💮 My Invoices		FIS001/0001	22 Oct 2014 16:50:15		Melinda Fisher	Sale of Lands in Wicklow	Carol Nolan
A My Cheques		DEA001/0000	22 Oct 2014 15:54:02		James Deane	0000 Matter	Admin
躸 Phone Log		CLI001/0001	22 Oct 2014 15:32:43		Bill Clinton	Unfair dismissal by State Department	Brian Sweeney
🕒 Strong Room		FIT002/0001	07 Jan 2014 10:22:19		Melinda FitzG	Sale of lands in wicklow	Carol Nolan
🔞 Document Search		KEL002/0002	07 Jan 2014 10:03:51		Sarah Kelly	Debt Collection	Carol Nolan
Template Library	L	ABB001/0001	12 Dec 2013 15:20:20		Goorge J Abb	Sale 46 Som gerset Road, Dublin 6	Brinn Sweeney.

6. Task Manager will show you your task list.

🗑 Tasks	н	and	ler	Care	ol No	olan 🔽 🗹 Ou	itStandir	na Onlv							
👱 My tasks	5	S	earch	n										Standard Vie	ew 🗌
👺 Team tasks						Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action	Diary Date	
🗊 Day's tasks	F	₿ ₿				24 Oct 2014	12:07	AAA001/0003	CN	сом	CN	AAA Securities Ltd Sale of 1 Main Street, Laragh, Co	Draft Bill	24 Oct 20	P
 Next week's tasks Next month's tasks 					10-	25 Jun 2014	17:09	CLI001/0001	CN	сом	CN	Bill Clinton Unfair dismissal by State Departm	Incoming Document	25 Jun 20	P
④ Overduettasks				ŧ		25 Jun 2014	16:29	CLI001/0001	CN	сом	CN	Bill Clinton Unfair dismissal by State Departm	Letter to Client	25 Jun 20	P
🕐 Outstanding tasks 🐻 Last week's tasks			Ŧ			25 Jun 2014	12:51	ABA001/0001	CN	сом	CN	David Abrahams Family Law	Court Date	25 Jun 20	P
🚞 Last month's tasks 🚰 All tasks		B	0			25 Jun 2014	08:40	ABB001/0001	CN	сом	CN	George J Abbott Sale 45 Somserset Road, Dublin 6	Allianz Quote	25 Jun 20	P
Ky Overview		<mark>₽8</mark>				04 Jun 2014	18:13	FIS001/0001	CN	сом	<u>CN</u>	Melinda Fisher	Riank Document	04 Jun 20.	R

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

🗃 Tasks	Carol Nolan		29 Oc	tober 2014				
My tasks	-	Recent Matt	ers	Task/Alert		Performance		
🖡 Team tasks	Code	Name	Description	No Over Due Tasks	30	My Time Day Book		0:25
	BLA001/0001	Gordon T. Black	RTA Walkinstown Crossroads, G. Black	No OutStanding Tasks	22	Time Recorded this Week		0:0
Day's tasks	BLA001/0000	Gordon T. Black	0000 Matter					0.0
Next week's tasks	AAA001/0003	AAA Securities Ltd	Sale of 1 Main Street, Laragh, Co. Wickl	Critical Tasks	1	Time Recorded this Month		0:0
Next month's tasks	CUL001/0001	Ann Marie Cullen	Credit Card Debit	Court Dates	2			
Overdue tasks	FIS001/0001	Melinda Fisher	Sale of Lands in Wicklow	High Priority Tasks		Fees Issued Current Month		
Outstanding tasks	DEA001/0000	James Deane	0000 Matter	High Phonty Tasks	2	Fees issued current Month		0
Last week's tasks	CLI001/0001	Bill Clinton	Unfair dismissal by State Department	Phone Message	1	Fees Issued Last Month		0
🗓 Last month's tasks	FIT002/0001	Melinda FitzGerald	Sale of lands in wicklow			Fees Issued Year to Date		0
All tasks	KEL002/0002	Sarah Kelly	Debt Collection					
My Overview	ABB001/0001	George J Abbott	Sale 45 Somserset Road, Dublin 6	Undertakings	0			
	ABA001/0001	David Abrahams	Family Law	Statue Date Approaching	1	Outstanding Invoice	4.	3,320
	DEA001/0001	James Deane	RTA Whites Cross, Stillorgan			Outstanding Fees	3	5.038
	ZZZZZZ/ZZZZ	Non Assigned	Phone Message					
	ABB001/0005	George J Abbott	RTA The Rise, Stillorgan			Debtors Days		1,718
	ZAC001/0000	Irina Zacawski	0000 Matter			Current Work in Progress	:	2,359
	ABA001/0002	David Abrahams	RTA - Listowel			Draft Invoice		0
		Case Alert	:					
	Open Matters		3	0		Current Lockup Value	4	5,679
	My Dormant Matters		2	2				
	No Case where expected in	voivce date has passed		0				
	No. case with no estimate of	liven	2	9				
Tasks	No. case approaching estim			1				
TOSKS	No. case approaching low	and the second second	and the second s	0	1	and the second	and the second s	and the second second

2

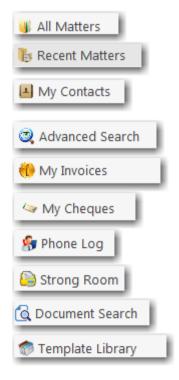
Chapter 2: Search & Open

The Search Screen

Home Case Rep		earch Toolb	ar		Keyhouse Case Management (CN - Carol	Nolan)		
New Case Copy Copy Copy Copy Copy Copy Copy Copy	onflict Search Case related GoTo		Search	box		Column	Headings	1
All Matters	Code	Last Accessed	File Colour	Name	Description			User 3
Recent Matters	BLA001/0001	28 Oct 2014 12:45:02			RTA Walkinstown Crossroads, G. Black	Brian Sweeney	1234T	
My Contacts	BLA001/0000	26 Oct 2014 14:22:17		Gordon T. Bla		Admin		
Advanced Search	AAA001/0003	24 Oct 2014 12:06:55	4		Sale of 1 Main Street, Laragh, Co. Wicklow			
My Invoices	Navio	gation Bar			Credit Card Debit	Carol Nolan		
My Cheques	INAVIE	Sation Dai		Melinda Fisher	Sale of Lands in Wicklow	Carol Nolan		
Phone Log				James Deane	0000 Matter	Admin		
Strong Room	CLI001/0001	22 Oct 2014 15:32:43		Bill Clinton	Unfair dismissal by State Department	Brian Sweeney		
Document Search	FIT002/0001	07 Jan 2014 10:22:19			Sale of lands in wicklow	Carol Nolan		
Template Library	KEL002/0002	07 Jan 2014 10:03:51		Sarah Kelly	Debt Collection	Carol Nolan	1278990	
Implate Library	ABB001/0001	12 Dec 2013 15:20:20			Sale 45 Somserset Road, Dublin 6	Brian Sweeney		
	ABA001/0001	12 Dec 2013 15:07:08		David Abraha		Anne Mellon	Matter List	
	DEA001/0001	12 Dec 2013 11:51:04	3	James Deane	RTA Whites Cross, Stillorgan	Brian Sweeney		
	ZZZZZZ/ZZZZ	12 Dec 2013 10:56:14		Non Assigned	Phone Message	Brian Sweeney		
	ABB001/0005	12 Dec 2013 10:30:27			RTA The Rise, Stillorgan	Brian Sweeney		
	ZAC001/0000	11 Dec 2013 16:25:54		Irina Zacawski	0000 Matter	Admin		
	ABA001/0002	11 Dec 2013 15:35:18		David Abraha		Brian Sweeney		
	ABA001/0000	11 Dec 2013 15:35:17		David Abraha		Admin		
	AAA002/0001	11 Dec 2013 15:35:16		AAA Worldwi		Brian Sweeney		
	AAA002/0000	11 Dec 2013 15:35:15		AAA Worldwi	0000 Matter	Admin		
	AAA001/0002	11 Dec 2013 15:35:14		AAA Securitie	New Lease 44 Main Street Dun Laoghaire	Martina Winte		

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

Navigating the Search Screen



Click on All Matters to list all matters.

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

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

Note this is for Fee Earners only.

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

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

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

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

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

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

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

Search Lists

Search All Matters List

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

						Keyhouse Case Management (CN - Carol
Home Case Rep	orts	Phone Log Ma	intain Setup Help			
New Case Copy Case Case maintenance	Conflict Case re	Search Hated GoTo				
Search/Open	\langle	Search	>			
🞳 All Matters		Code	Last Accessed 📍 🛛 🔺	File Colour	Name	Description
Recent Matters		AAA001/0002	11 Dec 2013 15:35:14		AAA Securitie	New Lease 44 Main Street Dun Laoghaire
My Contacts		AAA002/0000	11 Dec 2013 15:35:15		AAA Worldwi	0000 Matter
Advanced Search	•	AAA002/0001	11 Dec 2013 15:35:16		AAA Worldwi	Derek Bradley - export to USA Freight c
		ABA001/0000	11 Dec 2013 15:35:17		David Abraha	0000 Matter
💮 My Invoices		ABA001/0002	11 Dec 2013 15:35:18		David Abraha	RTA - Listowel
· ·						
A My Cheques		ZAC001/0000	11 Dec 2013 16:25:54	5	Irina Zacawski	0000 Matter
My Cheques	-	ZAC001/0000 ABB001/0005	11 Dec 2013 16:25:54 12 Dec 2013 10:30:27	4	Irina Zacawski George J Abb	0000 Matter RTA The Rise, Stillorgan
A My Cheques				6	George J Abb	

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

🔔 🔮	A		\mathcal{P}					
	flict Tase re	Search lated	GoTo					
Search/Open Sale								
🔍 Search/Open		Sale		۲				
		Sale Code		Last Accessed ⁹	▲ File Colour	Name	Description	Fee Earner
All Matters			/0001	Last Accessed ⁹ 12 Dec 2013 15:20:20	▲ File Colour		Description <mark>Sale</mark> 45 Somserset Road, Dublin 6	
All Matters Recent Matters		Code	,		▲ File Colour		-	
Search/Open Call Matters Call Matters Call Matters Call My Contacts Call Advanced Search		Code ABB001	0001	12 Dec 2013 15:20:20	▲ File Colour	George J Abb	Sale 45 Somserset Road, Dublin 6	Brian Sweene

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.

-									
_		4	1						
New Case Case main	Copy Case	Confli Case		Gearch GoTo					
				uul.	<u>_</u>				
🔍 Search/G	Open		5	ale					
			5	Code	Last Accessed ⁹	File Colour	Name	Description	Fee Earner
All Matte	rs				Last Accessed ⁹ 12 Dec 2013 15:20:20	File Colour		Description <mark>Sale</mark> 45 Somserset Road, Dublin 6	
All Matter Recent M	rs latters			Code		File Colour			
All Matter Recent M My Conta Advancec	rs latters acts			Code ABB001/0001	12 Dec 2013 15:20:20	File Colour	George J Abb	Sale 45 Somserset Road, Dublin 6	Brian Sweene

- 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.

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

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

Search My Contacts

- 1. Click on **Search/Open**.
- 2. Click on **My 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

New Case Copy Case Cose maintenance	Conflict Search Case related						
Search/Open	My Contact						
All Matters Recent Matters	Search						
My Contacts	Client Code	Name	Address	Telephone	Email		Fee Earner
Advanced Search My Invoices My Cheques	► AAA001	AAA Securities Ltd	44 Main Street Dun Laoghaire	012112112			MW
	AAA002	AAA Worldwide Remo	South Mall Cork	021 1241241	mareynolds@AAAw	orldwideremovals.ie	SK
🐓 Phone Log 🍋 Strong Room	ABA001	David Abrahams	123 Mayfair Street Dublin 2	01-2902222	d.abrahams@gmail.	.com	AM
🗟 Document Search	ABB001 George J Abbott		0 Somerset Road, 01-5656712		gabbott@iol.ie		BS
~ , ,	ABB002	Abbey & Procter	14 The Mews Dublin 12				SK
	ACC001 Accord Mus		56 Second Street Bray	01 200000			
			44 Main Street				
	Matters (AA	A001)					
	Search						
	Case Code	File Color	Description	Fee Earner	Deptment	Worktype	Started
	► AAA001/0003		Sale of 1 Main Street, Laragh, Co. Wicklow	Anne Mellon	General	High Court	24 Oct 201
	AAA001/0002		New Lease 44 Main Street Dun Laoghaire	Martina Winters		Lease	31 Jan 201

diary.

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

Abbot		8				
Client Code	Name	Address	Telephone	Email		Fee Earner
ABB001	George J <mark>Abbot</mark> t	60 Somerset Road, Ranelagh,	01-5656712	g <mark>abbot</mark> t@iol.ie		BS
atters (A	BB001)					
	BB001)					
	BB001)					
latters (Al learch Case Code	BB001) File Color	Description	Fee Earner	Deptment	Worktype	Started

 $\overset{\texttt{W}}{\longrightarrow}$ 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.

Lew Case Copy Case C	Conflict Search Case Heater							
Search/Open	Search: Abrahams						🕨 Go 👔	🗙 Res
	In fields Client Name 🗹 Case Description	🗹 Client Address 📝 Code 📝 C	ld Ref 🛛 🗹 File Ref					
All Matters Recent Matters	And Client Name:				And	File Ref:		
My Contacts	And Matter Desc.:				And	 User Field 2: 		
Advanced Search	And Client Address:				And	 User Field 3: 		
My Invoices My Cheques	And Matter Code: And	Old Ref:			And	Your Ref:		-
Phone Log	And Fee Earner: And	Dept:			✓ And	 WorkType: 		
Strong Room							Max. results	s: [
Document Search	Code Name	File Colour	Client Address		Description	F/e	Team	
Template Library	ABA001/0001 David Abrahams	123 Mayfair St	reet Dublin 2	Family Law		AM	сом	F/
	ABA001/0002 David Abrahams	123 Mayfair St	reet Dublin 2	RTA - Listowel	Aug and an a start a straight and	BS	COM	U

Simple Search

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

"OR" Search

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

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

Search: irela	ind					
In fields:	🗷 Client Name	Case Description	Client Address	Code	🔲 Old Ref	🔲 File Ref

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

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

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

"And" Search

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

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

5	Search:		
	In fields:	🗷 Client Name	e 🗷 Case Description 🛛 Client Address 📝 Code 📝 Old Ref 📝 File Ref
	And 🔻	Client Name:	Abbot
	And 🔻	Matter Desc.:	Sale
	And 🔻	Client Address:	Dublin
	And 🔹	Matter Code:	And Vold Ref:
	And 🔻	Fee Earner:	And Dept:

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

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

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

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.

earch: Ellis%Ra	thmines						
In fields: 🛛 🔽	Client Name	🗷 Case Descrip	tion 🛛 🗷 Clie	nt Address	🗷 Code 🛛 Old Ref 📝 File Ref		
And 🔹 Clie	ent Name:						
And • Ma	tter Desc.:						
And Client Address:							
And • Ma	itter Code:		And • Old	Ref:			
And • Fee	Earner:	•	And • Dept	:			
Code		Name		File Colour	Client Address	Description	
DUN001/0001	John Dunne				44 Ellis Drive Rathmines Dublin 8	Sale of Village Hall	
BLA001/0001	Gordon T. Bla	ack			23 Ellis Park, Rathmines, Dublin 6.	RTA Walkinstown Crossroads, G. Black	
3LA001/0000	Gordon T. Bla	ack			23 Ellis Park, Rathmines, Dublin 6.	0000 Matter	
BLA001/0002	Gordon T. Bla	ack			23 Ellis Park, Rathmines, Dublin 6.	Sale of 2 Trinity Close, Rathgar, Dublin 6	
BLA001/0004 Gordon T. Black		23 Ellis Park, Rathmines, Dublin 6.	Purchase of 8 Clonattin Hills, Wicklow.				
BLA001/0007	Gordon T. Bla	ack			23 Ellis Park, Rathmines, Dublin 6.	Rates Collection proceedings action	
DUN001/0000	John Dunne				44 Ellis Drive Rathmines Dublin 8	Document matter	

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

Manipulating the Search Screen

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

How to Sort Column Headings

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

Code	Last Accessed 🔹	File Colour	Name	Description	Fee Earner
DUN001/0001	29 Oct 2014 21:03:07		John Dunne	Sale of Village Hall	Anne Mellon
FIT002/0001	29 Oct 2014 20:19:40		Melinda FitzG	Sale of lands in wicklow	Carol Nolan
BLA001/0001	28 Oct 2014 12:45:02		Gordon T. Bla	RTA Walkinstown Crossroads, G. Black	Brian Sweeney
BLA001/0000	26 Oct 2014 14:22:17		Gordon T. Bla	0000 Matter	Admin
AAA001/0003	24 Oct 2014 12:06:55		AAA Securitie	Sale of 1 Main Street, Laragh, Co. Wicklow	Anne Mellon
CUL001/0001	23 Oct 2014 10:52:07		Ann Marie Cul	Credit Card Debit	Carol Nolan
FIS001/0001	22 Oct 2014 16:50:15		Melinda Fisher	Sale of Lands in Wicklow	Carol Nolan
DEA001/0000	22 Oct 2014 15:54:02		James Deane	0000 Matter	Admin
	DUN001/0001 FIT002/0001 BLA001/0001 BLA001/0000 AAA001/0003 CUL001/0001 FIS001/0001 DEA001/0000	DUN001/0001 29 Oct 2014 21:03:07 FIT002/0001 29 Oct 2014 20:19:40 BLA001/0001 28 Oct 2014 12:45:02 BLA001/0000 26 Oct 2014 14:22:17 AAA001/0003 24 Oct 2014 12:06:55 CUL001/0001 23 Oct 2014 10:52:07 FIS001/0001 22 Oct 2014 16:50:15 DLN001/0000 22 Oct 2014 15:54:02	DUN001/0001 29 Oct 2014 21:03:07 FIT002/0001 29 Oct 2014 20:19:40 BLA001/0001 28 Oct 2014 12:45:02 BLA001/0000 26 Oct 2014 14:22:17 AAA001/0003 24 Oct 2014 12:06:55 CUL001/0001 23 Oct 2014 10:52:07 FIS001/0001 22 Oct 2014 16:50:15 DEA001/0000 22 Oct 2014 15:54:02	DUN001/0001 29 Oct 2014 21:03:07 John Dunne FIT002/0001 29 Oct 2014 20:19:40 Melinda FitzG BLA001/0001 28 Oct 2014 12:45:02 Gordon T. Bla BLA001/0000 26 Oct 2014 14:22:17 Gordon T. Bla AAA001/0003 24 Oct 2014 12:06:55 AAA Securitie CUL001/0001 23 Oct 2014 10:52:07 Ann Marie Cul FIS001/0001 22 Oct 2014 16:50:15 Melinda Fisher DEA001/0000 22 Oct 2014 15:54:02 James Deane	DUN001/000129 Oct 2014 21:03:07John DunneSale of Village HallFIT002/000129 Oct 2014 20:19:40Melinda FitzGSale of lands in wicklowBLA001/000128 Oct 2014 12:45:02Gordon T. BlaRTA Walkinstown Crossroads, G. BlackBLA001/000026 Oct 2014 14:22:17Gordon T. Bla0000 MatterAAA001/000324 Oct 2014 12:06:55AAA SecuritieSale of 1 Main Street, Laragh, Co. WicklowCUL001/000123 Oct 2014 10:52:07Ann Marie CulCredit Card DebitFIS001/000122 Oct 2014 16:50:15Melinda FisherSale of Lands in Wicklow

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

How to Filter Columns

Group By This Column
Show Group Panel
Show Column Chooser
Best Fit
Best Fit (all columns)
Filter Editor...

Sort Ascending

₹↓ Sort Descending

🔆 Clear Sorting

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

Code	Last Accessed	File Colour	Name	Description	Fee Earner	File Ref
DUN001/0001	29 Oct 2014 21:03:07		John Dunne	Sale of Village Hall	Anne Mello	(Blanks)
FIT002/0001	29 Oct 2014 20:19:40		Melinda FitzG	Sale of lands in wicklow	Carol Nola	(INON DIANKS)
BLA001/0001	28 Oct 2014 12:45:02		Gordon T. Bla	RTA Walkinstown Crossroads, G. Black	Brian Swee	Admin
BLA001/0000	26 Oct 2014 14:22:17		Gordon T. Bla	0000 Matter	Admin	Anne Mellon Brian Sweeney
AAA001/0003	24 Oct 2014 12:06:55		AAA Securitie	Sale of 1 Main Street, Laragh, Co. Wicklow	Anne Mello	Carol Nolan
CUL001/0001	23 Oct 2014 10:52:07		Ann Marie Cul	Credit Card Debit	Carol Nola	
FIS001/0001	22 Oct 2014 16:50:15		Melinda Fisher	Sale of Lands in Wicklow	Carol Nola	Martina Winters
DEA001/0000	22 Oct 2014 15:54:02		James Deane	0000 Matter	Admin	Stephen Keogh
CLI001/0001	22 Oct 2014 15:32:43		Bill Clinton	Unfair dismissal by State Department	Brian Swee	

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).

₩Į	Sort Ascending
Z ↓	Sort Descending
2¥	Clear Sorting
в	Group By This Column
-	Show Group Panel
1	Show Column Chooser
₽	Best Fit
	Best Fit (all columns)
۳×	Clear Filter
Ŷ	Filter Editor

How to Group by Column

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

J2↓	Sort Ascending
Z↓	Sort Descending
2¥	Clear Sorting
8	Group By This Column
-	Show Group Panel
1	Show Column Chooser
₽	Best Fit
	Best Fit (all columns)
۳ <mark>x</mark>	Clear Filter
Ŷ	Filter Editor

Se	earch						
	Code	Last Accessed	File Colour	Name			
+	Fee Earner: Admin						
	► Fee Earner: Anne Mellon						
► Fee Earner: Brian Sweeney							
	▶ Fee Earner:	Carol Nolan					

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

	Code	Last Accessed	File Colour	Name	Description		
	► Fee Earner: Ad	min					
Þ	∡ Fee Earner: An	ne Mellon					
	DUN001/0001	29 Oct 2014 21:03:07		John Dunne	Sale of Village Hall		
	AAA001/0003	24 Oct 2014 12:06:55		AAA Securitie	Sale of 1 Main Street, Laragh, Co. Wicklow		
	ABA001/0001 12 Dec 2013 15:07:08 David Abraha Family Law						
	► Fee Earner: Bri	an Sweeney					
	▶ Fee Earner: Car	ol Nolan					
-	Fee Earner: Jus	tin Phelan					

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

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

Ŵ
${}^{rac{W}{V}}$ To return to the standard
view click on the view tool
located on the search bar
to show a list of available
views. Select Standard
View.

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

Document Search

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

How to open the Document Search

- 1. Click on Search/Open, then on Document Search
- Input the search keywords on the Document Search screen and
 - Select a client, or leave blank to search against all clients.
 - Select a matter or leave blank to search against all matters.

	Keyhous	e
Search:	Search	
Client:	Enter (part of) Client Name or Search for Client	
Case / Matter:	Enter (part of) Case Description or Search for Case	
	Search K Clear Advanced	\otimes

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

Chapter 3: Creating New Clients and Cases

The New Case Wizard

Create a New Case for an Existing Client

New

(

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

Home	Case	Rep	orts	Phone Lo	ig Ma	aintain	Setup	Help
Case Ci Case naintei	opy Ca	se C	onflict Case re		р _{GoTo}			
	۲			New M	atter/Case Wizard			×
new	Ne	ew or Ex	kisting (Client	Step 1/7	Step 2/7	Step 3/7	Step 4/7
tact.	Select the	option that o	describes the	action you wish to	take			
ιατι.		t an existing cli						
amo		Search						
ame		Code	Name		Address			
earch		AAA001	AAA Secur	ities Ltd	44 Main Street			<u> </u>
		AAA002	AAA World	lwide Removals	South Mall			
		A8A001	David Abra	ahams	123 Mayfair St			
		A88001	George J A	bbott	60 Somerset R	oad,		
		ARROO2 <	Ahhev & P	rncter	14 The Mews			· · ·
ngs.	O Clie	nt is not listed a	ibove. Create ne	ew client for this new	matter		Previo	us Next
				New Ma	tter/Case Wizard			×
ick I skip	Ne	ew or Ex	kisting (Client	Step 1/7	Step 2/7		Step 4/7
liately		e option that o t an existing clie		action you wish to r	take			
		keogh		8				
	-	Code	 Name 	-	Address			
nt or		 KEO003 	Sam Keogl	1	Main Street			^
ent or		ZZKE01	Stephen K		1 Main Street			
above			- opened to					
abore	_							~
	L	۲.						>
etails	⊖ clie	nt is not listed a	bove. Create ne	w client for this new	matter		Previo	is Next
three			_					

Please enter the ne	ew clients details below.		
Client code*	BAR]	
Client name*	Enter Client Name		
Salutation	Enter Salutation]	
Address	Enter Client Address		
Telephone	Enter Telephone	Fax	Enter Fax Number
Mobile	Enter Mobile Number	Email	Enter Email ID
Fee Earners *	Select Fee Earner		Approved for money laundering

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 following from the relevant drop-down lists:

- Fee Earner handling the matter
- **Department** (e.g. Conveyancing, Litigation)
- Case Plan (i.e. workflow)
- The *Partner* with responsibility for the matter
- Work Type

Step 2/7 Step 3/7 Step 4/7 You must enter a description for the matter Description* Sale of 1 Main Street, Howth, Co. Dublin Fee Earmer* Brian Sweeney Partner* Step How Nork Type* Department* Conveyancing Work Type* Sale		New Ma	atter/Case Wizard		×
Description* Sale of 1 Main Street, Howth, Co. Dublin Fee Earner* Brian Sweeney V Partner* Stephen Keogh V Department* Conveyancing V Work Type* Sale V	Enter N	latter Description		Step 2/7 Step 3/7	Step 4/7
Fee Earner* Brian Sweeney V Partner* Stephen Keogh V Department* Conveyancing V Work Type* Sale V	You must enter a	description for the matter			
Department* Conveyancing V Work Type* Sale V	Description*	Sale of 1 Main Street, Howth, Co. Dublin	n		
	Fee Earner*	Brian Sweeney	Partner*	Stephen Keogh	~
Case Plan* Sale	Department*	Conveyancing	Work Type*	Sale	~
	Case Plan*	Sale			
					evious Next

10. Click **Next** to continue to the next step.

Most of the information sought by this screen is optional but that shown in bold italics below may be required, depending on your system settings:

- Old Reference
- Your Reference (i.e. the client's reference, if any)
- Three additional reference fields, the prompts for which may vary from one system to another
- The *Estimate of Fees* check the box if the fees are fixed
- The *Expected Bill Date*
- The **Budget Outlay**
- 11. Click **Next** to continue to the final screen.
- 12. 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.

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

۲		New Matter/Case Wizard				×
Ref. and	d Estimate Fee	Step 2/7	Step 3/7	Step 4/7	Step 5/7	
Enter optional othe	er case reference below.					
Old Reference	KEO097	Your Reference	K00009			
File Ref	KeoSte		Enter			
	Enter					
Estimate Fee	4,000.00	Fixed Fee				
Expected Bill Date	31 Oct 2014	~				
Outlay Budget	2,000.00					
				Previ	ous	t

	New Matt	ter/Case Wizard				×
Ref. and Estimate Fee		Step 4/7	Step 5/7	Step 6/7	Step 7/7	
Click finish to create new matter.						
Copy matter details from another r	natter					
Print client label						
Print matter label						
				Previ	ous Finish	

Copy Case Details

- 1. Click on the **Copy Case tool** copy **Case** located on the **Case** tab of the Ribbon to open the **Copy Case/Matter Wizard**, which starts with a welcome screen.
 - Note: As seen in the previous section, the Copy Case Wizard may also be started by checking the relevant box on the final screen of the New Case Wizard.
- 2. Click **Next** to continue to Step 2.
- 3. Select a source matter by clicking the browse button.
 - This will bring up a matter list which may be searched as described in Chapter 2.
- 4. **Double-click** the matter from which the details are to be copied. The matter list will close and the code of the selected case will be entered in the first box on the Step 2 screen.
- 5. Select the destination matter in the same way.
 - Note if you started the Copy Case wizard from the final screen of the New Case wizard, the destination matter will already be filled in.
- Click Next to continue to Step 3, which lists the User Defined Fields (UDFs) which are in use in the source matter.

		000	,				Ŷ
Сор	oy Case∕№	latter Wizar	d	Step 1/6	Step 2/6		
Matter,		ails based on previou	us matter copied				
	Matter code	AAA001/0004					
Destina		ation matter code w	here the selected o	odes has to	be copyied		
	Matter code	Please select matte	er code 🛄 📖				
					Previ	bus	Next
	Cop Matter,	Copy Case/M Matter/Case Copy case det Matter code Destination Case Select a destin	Copy Case/Matter Wizar Matter/Case Copy case details based on previor Matter code AAA001/0004 Destination Case Select a destination matter code w	Copy Case/Matter Wizard Matter/Case Copy case details based on previous matter copied Matter code AAA001,0004 Destination Case Select a destination matter code where the selected of	Copy Case/Matter Wizard Step 1/6 Matter/Case Copy case details based on previous matter copied Matter code AAA001/0004 Destination Case Select a destination matter code where the selected codes has to	Copy Case/Matter Wizard Step 1/6 Step 2/6 Matter/Case Copy case details based on previous matter copied Matter code AAA001/0004 Destination Case Select a destination matter code where the selected codes has to be copyied Matter code Please select matter code	Copy Case/Matter Wizard Step 1/6 Step 2/6 Step 2/6 Matter/Case Copy case details based on previous matter copied Matter code AAA001/0004 Destination Case Select a destination matter code where the selected codes has to be copyied Matter code Please select matter code

۲		Ad	dvanced Matter Search	
Search:				🕨 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. Dublir
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. Wicki
FIS001/0001	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
<				

D		Copy Case/Matter 1	Vizard		
С	opy Case/N	latter Wizard	Step 1/6	Step 2/6 Step 3	/6
Matt	er/Case				
	Copy case det	ails based on previous matter cop	pied		
	Matter code	CUL001/0001	.)		
Dest	ination Case				
	Select a destin	nation matter code where the sele	cted codes has to be	copyied	
	Matter code	Please select matter code			
				Previous	Next

- 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.

(Сору Са	ase/Matter Wizard	Step 1/6 Step 2/6 Step 3/6	
		Drag a column header here to	e group by that column	
	Group	Detail	Value	
		"I" if single or "we" if joint ?	I	
		"my" if the client is single else "	my	
		Estimated Date of Closing.	15th March 2009	
		Folio Number ?	98659	
		Townland		
9		Which County ?	County Dublin	
		Date of Contract	N/A	
		Loan Account Number ?	1258745 AE	
		Balance of Sale Price ?	587,000	
		Agreed Valuation of Househol	12,000	
		Is the property the Vendor's Fa	Yes	
9		Has there been any unauthoris	No	
		Duration of Lease term.	N/A	

- 10. In Step 4, the **Case Associates** in the source matter are listed.
- 11. Again, you may filter or sort the Case Associates to make it easier to select those to be copied.
- 12. Check the corresponding boxes to select the Case Associates you wish to copy to the destination case.
- 13. Click **Next** to continue to Step 5, which lists the actions in the source matter.
- 14. The procedure for selecting and copying the actions to the destination matter is similar to those for copying UDFs and Case Associates.
 - If you copy any action to the destination matter you will also copy any documents attached to that action.

		Туре	Name/Com	Address	Phone	Solicito	Email	CaseC	Mobile
I	Z	Auctio	Kelly Proper	6 Upper Fitzwilliam Street Dublin 2	763534		info@k	BAR00	
		Lendin	Kilkenny (Ba	5 Main Street Kilkenny Co. Kilkenny	042 67			BAR00	
	¥	Local A	Wicklow Co	County Buildings Wicklow.	0404-2			BAR00	
		Purcha	Andrew Dun	66 Fleet Street, Rathmines, Dublin 6				BAR00	
	2	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 S	tep 5/6
		Action Date	Action Code	Description	Action ID
		22 Dec 2011	507	Handle Pre-contract enquiries.	152
		07 Dec 2011	EMI	See attached Proposal Document from the SFA. Could yo	144
		24 Nov 2011	S99	Review Undertakings to be Discharged	85
		16 Nov 2011	506	Seek Copy Folio	135
		12 Oct 2011		Phone message from Tony. Please call back on 087 25356	133
	\checkmark	04 Oct 2011	G02	Letter to Client	78
		07 Jul 2011	505	Do Contracts, Requisitions & Family Home Dec.	117
		30 Mar 2010	521	Ltr - Client re Statement of Account.	455
	\checkmark	10 Mar 2010	518	Pre-Closing: Unusual Matters	454
		28 Feb 2010	513	Do Redeemption Figs. & Prepare Closing Documents	453
		22 Feb 2010	510	Chase Ltr to Purchaser's Solr re Contract	452
I	\checkmark	14 Feb 2010	507	Handle Pre-contract enquiries.	45
		14 Feb 2010	505	Do Contracts, Requisitions & Family Home Dec.	450
		13 Jan 2010	501	Initial Sale Letter & Instructions to Client	449

- 15. Click **Next** to continue to the final screen.
- 16. If you check the checkbox, details will be saved of the fields, Case Associates and actions which were copied, so that they will be selected by default the next time this source matter is copies.

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

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

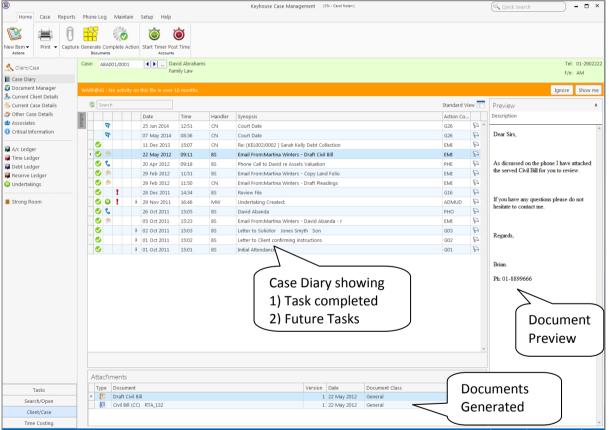
٢			Cop	y Case/Mat	ter Wizard				×
	Copy Case/Matte	r Wi	zar	d		Step 4/6	Step 5/6		
	Completing Copy Case/N	latter	Wiz	ard					
	You have successfully	Comple	eted C	Copy Case	/Matter V	Vizard			
	☑ Save selection for t	ie next	сору	of this ca	se plan				
	Case Fields Copied	5							
	Case Associate Copied	3							
	Case Diary Copied	4							
							Previ	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.



Standard View

Configuring the Case Diary Screen

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

How to Configure your Case Diary Screen

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

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

Sample 1: Standard Screen with fixed Floating Document Preview Pane

How to create this view:

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

Client/Case	Cas	e: A	BA001/0	001	↓ → Da Fai	vid Abrahar nily Law	15			Tel: 01-2 F/e: AM	902	
Case Diary												
Document Manager	WA									Ignore Sho	w	
Current Client Details	_								-		-	
Scurrent Case Details		📽 Se	arch						Preview		-	
Other Case Details	8				Date	Time	Handler	Synopsis	Description			
Associates	8		ক		25 Jun 2014	12:51	CN	Court Date			1	
Critical Information			ক		07 May 2014	08:36	CN	Court Date				
A/c Ledger		0			11 Dec 2013	15:07	CN	Re: (KEL002/0002) Sarah Kelly Debt Collection	Dear Sirs.			
A/c Ledger Time Ledger		0	٢		22 May 2012	09:11	85	Email From:Martina Winters - Draft Civil Bill	Dear Sirs,			
Debt Ledger		0	C I		20 Apr 2012	09:18	BS	Phone Call to David re Assets Valuation				
Reserve Ledger		• 🥑	۲		29 Feb 2012	11:51	BS	Email From:Martina Winters - Copy Land Folio	Please see attached PDF fo			
Undertakings		0			29 Feb 2012	11:50	CN	Email From:Martina Winters - Draft Pleadings	in question. If you have any			
		0	1		28 Dec 2011	14:34	BS	Review File	please do not hesitate to cal			
Strong Room		0	0 1		# 29 Nov 2011	16:46	MW	Undertaking Created:				
		0	2		26 Oct 2011	15:05	85	David Abanda				
		0			05 Oct 2011	15:23	BS	Email From:Martina Winters - David Abanda - r	Regards,			
		0			# 02 Oct 2011	15:03	BS	Letter to Solicitor Jones Smyth Son				
		0			# 01 Oct 2011	15:02	BS	Letter to Client confirming instructions				
		0			# 01 Oct 2011	15:01	BS	Initial Attendance	Brian Sweeney			
									Enlightenment Legal Service			
									Emginemical Legal Service	9		
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~									Ph: 01-2040020			

Sample 2: Standard view with fixed 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.
- 2. Click on the Pin to make it permanently visible.

Document Manager										Ignore Show	
Current Client Details Current Case Details	8			ty on this rise in over	to manini.			Standard Vie	- 11		
Other Case Details	6			Date	Time	Handler	Synopsis	Action Co		Description	
Associates	8	a.		25 Jun 2014	12:51	CN	Court Date	626	Pa		
Critical Information		P		07 May 2014	08:36	CN	Court Date	G26	9		
	- 0			11 Dec 2013	15:07	CN	Re: [KEL002/0002 ] Sarah Kelly Debt Collection	EME	9	Dear Sirs.	
A/c Ledger Time Ledger	0			22 May 2012	09:11	85	Email From:Martina Winters - Draft Civil Bill	EMI	P	Dear Sers,	
Debt Ledger	0	2		20 Apr 2012	09:18	85	Phone Call to David re Assets Valuation	PHE	9		
Debt Ledger     Reserve Ledger     Undertakings	. 0	3		29 Feb 2012	11:51	BS	Email From:Martina Winters - Copy Land Folio	EME	9		
				29 Feb 2012	11:50	CN	Email From:Martina Winters - Draft Pleadings	EME	9	Please see attached PDF for the property in question. If you have any questions	
			1	28 Dec 2011	14:34	85	Review File	G16	9	please do not hesitate to call.	
Strong Room	0	0	1	# 29 Nov 2011	16:46	MW	Undertaking Created:	ADMUD	P		
		2		26 Oct 2011	15:05	85	David Abanda	PHO	P		
		-		05 Oct 2011	15:23	BS	Email From:Martina Winters - David Abanda - r	EMI	P	Regards,	
				# 02 Oct 2011	15:03	BS .	Letter to Solicitor Jones Smyth Son	601	9		
				# 01 Oct 2011	15:02	85	Letter to Client confirming instructions	602	A		
				# 01 Oct 2011	15:01	85	Initial Attendance	601	9	Brian Sweeney	

#### 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.

Case Diary						
Document Manager	w	ARNING : No activity on this file in over 10 months.				
Current Client Details Current Case Details		Action 🛥			Standard Vie	ew
🕻 Other Case Details	Action	Sale	Handler	Synopsis	Action Co	
Associates	ion	Instruction Received	CN	Court Date	G26	ß
Critical Information		Initial Letter and Section 68	CN	Court Date	G26	F
A/c Ledger		Pre Contract Enguiries	CN	Re: [KEL002/0002 ] Sarah Kelly Debt Collection	EMI	1
Time Ledger		Draft Contract	BS	Email From:Martina Winters - Draft Civil Bill	EMI	1
Debt Ledger		Letter to other Purchasers Solicitor encl. Contract	BS	Phone Call to David re Assets Valuation	PHE	8
Reserve Ledger		Contract Stage	BS	Email From:Martina Winters - Copy Land Folio	EMI	1
Undertakings		Searches	CN	Email From:Martina Winters - Draft Pleadings	EMI	8
		Closing Documents	BS	Review File	G16	8
Strong Room		Letter to Land Registry	MW	Undertaking Created:	ADMUD	8
		cener to cana negistry	BS	David Abanda	PHO	1
			BS	Email From:Martina Winters - David Abanda - r	EMI	1
			BS	Letter to Solicitor Jones Smyth Son	G03	1
			BS	Letter to Client construction of the construct	. G02	F

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

#### 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.
- 2. Click on the **Pin** to make it permanently visible.
- 3. Then move you mouse over **Preview** to the located to right of the Case Diary Screen the document preview pane will appear.
- 4. Click on the **Pin** to make it permanently visible.

Case Diary										
Document Manager	WARNENG : No activity on this file in over 10 month	hs.								Ignore Show r
Current Case Details	Action *	-	ranh :					Standard Vie	ew 🗖	Preview
Other Case Details	Sale			Date	Time	Handler	Synopsis	Action Co		Description
Associates	Instruction Received		ক	25 Jun 2014	12:51	CN	Court Date	626	Pr	
Critical Information	Initial Letter and Section 68		ক	07 May 2014	08:36	CN	Court Date	G26	P	
A/c Ledger	Pre Contract Enguiries	0		11 Dec 2013	15:07	CN	Re: [KEL002/0002 ] Sarah Kelly Debt Colle	EME	P	Dear Sirs.
Time Ledger	Draft Contract	0	*	22 May 2012	09:11	15	Email From:Martina Winters - Draft Civil Bill	EME	9	LYCH ORD,
Debt Ledger	Letter to other Purchasers Solicitor encl. Contract:	0	2	20 Apr 2012	09:18	85	Phone Call to David re Assets Valuation	PHE	9	
Reserve Ledger	Contract Stage	. 0	9	29 Feb 2012	11:51	85	Email FromMartina Winters - Copy Land	EME	9	Please see attached PDF for the property
Undertakings	Searches	0		29 Feb 2012	11:50	CN	Email From:Martina Winters - Draft Pleadi	EME	P	in question. If you have any questions
	Closing Documents	0	1	28 Dec 2011	14:34	85	Review File	616	9	please do not hesitate to call.
Strong Room	Letter to Land Registry	0	0 !	29 Nov 2011	16:45	MW	Undertaking Created:	ADMUD	P	
	terrer to the designer,	0	2	26 Oct 2011	15:05	85	David Abanda	PHO	9	
		. 0		05 Oct 2011	15:23	85	Email From:Martina Winters - David Aban	EML	P	Regards,
		0		02 Oct 2011	15:03	85	Letter to Solicitor Jones Smyth Son	603	9	
		0		01 Oct 2011	15:02	85	Letter to Client confirming instructions	G02	P	
		0		01 Oct 2011	15:01	85	Initial Attendance	G01	P	Brian Sweeney
										Enlightenment Legal Services
										compared and the second second

 $\overset{\otimes}{\mathbb{V}}$  Note: You can also sort the columns by clicking on the column headings in the Case Diary Screen.

#### Warning Messages

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

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

#### How to Show or Ignore a message

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

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

 $\overset{\texttt{W}}{\overset{}}$  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.

Only speak to John Dunne with	h calling this clien						
Show Alert							
Account Summary			Action Summa	iry			
Debtors A/c	7,396.75	3 Year 10 Month 15 Days O/s	Start Date	06 Jun	2010	File Colour	Т
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	Heaton			
Client Deposit	0.00		Last Record Tir	ne	MW	01 Sep 2011	Client Meeting re issue with plan
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					

**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** Ignore to ignore the

to ignore the message and remove it from the case.

#### **Case Diary Symbols**

Ta	Tasks in Yellow denote milestone tasks.				
0	12 Dec 2013•	14:53	CN	Contract Stage	

Keyhouse	Chapter 4: The Case Diary
Tasks with a Red Dot denote a high priority task.	
	1
I 10 Dec 2013 17:58 CN Draft Contract	
Tasks with a Calendar Symbol denote an appointment.	
😰 🛛 🕴 21 May 2010 10:45 BS Appointment	
Tasks with a Phone Symbol denote a phone call.	
📞 🕴 11 Dec 2013 08:46 CN Phone call re B	rief
Tasks with a Broken Yellow Box denote documents processed.	
11:36 CN Searches	
Tasks with a Blue Tick denote a completed task.	
✓	Land Registry
Tasks with a yellow note denote a Note.	
O1 Nov 2014 11:40 CN Ring Client re	. bank statements
Tasks with a hand denote a delegated task.	
O1 Nov 2014 11:40 CN Ring Client r	e. bank statements
Tasks with a blue arrow denote tasks of low importance.	
↓ 19 Jun 2010 14:22 BS Check details on fil	
	5
Tasks with U denote an Undertaking.	
Undertaking 01 Nov 2014 11:49	Created:
Tasks with S denote a Statute of Limitation date or a critical date action.	
Statute of Limitations 27 Sep 2011 22:20 BS Statute of Limitations	Date = 7/10/2011
Tasks with an envelope denote an email sent or received.	
16 May 2012 11:13 BS Email From:Martina	Winters - Mutual Confident
Tasks with a document attached	
I6 May 2012 11:22 BS Letter to Solicitor re title Letter to Solicitor re t	etter to Allsop & Browne

# The Case Diary Toolbar

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

# Navigation within the Case Diary

Case: FIS001/0001 Melinda Fisher Sale of Lands in Wickle	W.	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.

# **Case Diary Navigation Panel**

Lase 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.
Scurrent Case Details	Current Matter Details	Click on this to view or edit the current case/matter details.
🎒 Other Case Details	Other Case Details	Click on this to view other case details
🐮 Associates	Associates	Click on this to view case associates i.e. professionals or parties connected to this case.
<ol> <li>Critical Information</li> </ol>	Critical Information	Click on this to view critical information particular to this case.
👰 A/c Ledger	Accounts Ledger	Click on this to view the accounts ledger.
📓 Debt Ledger	Debt Ledger	Click on this to view the debt ledger.
翼 Time Ledger	Time Ledger	Click on this to view the time ledger.
🙀 Reserve Ledger	Reserve Ledger	Click on this to view the reserve ledger.
Undertakings	Undertakings	Click on this to view the undertakings on this case.
E Strong Room	Strong Room	Click on this to view items in your strong room.
💾 Case Diary	Case Diary	Case Diary Screen

# **Amending Client and Case Details**

### **Updating Client Details**

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

**Input** the following information as required:

General	Input/Amend	1	Current	Client Details	×
	information on the client's	Code AAA00	01 Client Name AA	A Securities Ltd	
	name, address,	General Client Co	ntacts Notes Matters Cross Ref C	ategories Corpora	te Personal Legal Details Billing Details
	telephone numbers etc.	Address	44 Main Street Dun Laoghaire Co Dublin	Telephone Fax No	012112112
				Mobile	087111111
Client Contacts	Click on <b>Client</b>	E-Mail Other ref	tdaly@gmail.com Daly01	Nationality PPS no	Ireland 🗸
	<b>Contacts</b> to	Fee earner *	Martina Winters	Spouse PPS	78995612Z
	add additional	Client VAT no	1238990X	Tax type	Income
	client contacts	Postal Code	Co. Dublin	County	Dublin
	for example the client's	✓ Approved	d for money laundering Check if this	contact is an organi	sation Receive monthly statements
	spouse or if the				Ok Cancel
	client is a				
	company add an	employee	e's details.		
	. ,	. ,			
Notes	Click on the <b>Note</b>	es Tab to e	enter notes relation	ng to the	e client.
Matters	Click on the <b>Matt</b> client.	ters tab to	view a list of all	active m	atters assigned to this
Cross Reference	Click on <b>Cross Re</b> example a husba			e client v	vith another for
Categories	Click on <b>Categori</b>	es tab to a	add the client to a	a catego	ry.
Personal	Click on the <b>Pers</b> Birth, Date of Ma			persona	al details for e.g. Date of
Legal Details	Click on the <b>Lega</b> Legal Name.	l Details t	<b>ab</b> to add the leg	al detail	s about the client. E.g.
Billing Details	•	ng Details	<b>tab</b> to add inform	nation o	n the billing details of

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

### **Updating Case Details**

1. Open a case in the Case Diary.

2. Click on Current Case Details

Scurrent Case Details

located on the **Navigation** panel.

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

Matter	Input/Amend	)		Current Case Details		×	any
matter	details relating	Client Code	AAA001 Description	Landlord Dispute			to
	the matter	Matter	0001				
	description.	Matter Admir	Case Associate Other Detail	s Archive Billing Details	Permission Transaction	n	
	•	Fee Earner	Martina Winters	▼ File Ref	Enter File Ref		
	Using the drop	Secretary	Select Secretary		Enter		
	arrows amend	Partner	Justin Phelan	~	Enter		the
	fee earner,	Department	Litigation	Your reference	Enter Your Reference		
	secretary,	Work type		~	Mark as Important		
	partner,	Old reference	Enter Old Reference		Statement		
	department,	Case Plan and			adat site adam		
	work type.	Case Plan/Ty Case status	Select Case Status	File colour	Select File Colour	<u> </u>	
	<i>,</i> ,						
	Input (if					Ok Cancel	
	applicable) Old						Ref,
	File Ref, Your Refere	nce.					- ,
	,						
	Check the appropriat	te boxe	s to mark the c	ase as impor	tant, or if m	nonthly state	ments
	are required.			·	·	·	
	•						
	Click on the drop do	wn arro	<b>ws</b> to amend t	the Case Plan	, Status and	d File Colour.	
	Input the <b>court reco</b>	r <mark>d nu</mark> m	<b>ber</b> if applicabl	e to this case	2.		
Admin	Click on the <b>Admin t</b>	<b>ab</b> to ad	dd or amend va	alue to the cli	ent amoun	t, the start da	ate
	statute date, deposit						
	amount and the expe				, ,		
	Estimate of Fees	Che	ck the box if ar	n estimate of	fees has be	en given.	
						0	
	Comments	Inpu	it any commen	its.			
	Charge Rate Level:	Usir	ng the option b	uttons. selec	t a charge ra	ate level	
	0		0	,	U		
	Effectively complete	Tick	if the case is e	ffectively cor	nplete.		
<b>. .</b>							
Case Associate	Click on the Case Ass	ociate	tab to add, vie	w, edit or del	lete Case As	ssociates.	
	Input (if applicable) a	alternat	tive client deta	ils such as cli	ent name, s	alutation, ad	dress
	and click on the <b>Set</b> (						
						-	
<b>Other Details</b>	Click on the <b>Other D</b>	etails ta	<b>ab</b> to view a list	t of user varia	ables eg. Pu	rchase price,	
	secretary reference	etc. eith	ner already add	led to the cas	e or due to	be added.	
	<b>2</b> 00						
	🖑 Tip: To amend t	the use	er variables cli	ick on <b>Other</b>	· Case Deta	ails on the	
	Navigation pan						

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

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

### Inserting a Statute of Limitations Date

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

Ì				Current	Case Details				×
Clien	t Code	AAA001	Description	Description Landlord Dispute					
Matter		0001							
Matter	Admin	Case Associate	Other Details	Archive	Billing Details	Permission	Transaction		
Value to	o client	12,000.00			Estimated fees	7,500.00	)	Fixed Fee	
Started	date	06 Jun 2010		~	Exp bill date	13 Feb 2	13 Feb 2015		~
Statute	date	06 Nov 2014		~		🗹 Estima	ate Given		
Deposit	Deposit name Enter Deposit		Name			Sectio	n 13		
Outlay I	budget	5,000.00	5,000.00		Type Select Deposit T		eposit Types		~
Comm	ients								
Only	speak to J	Iohn Dunne with c	alling this client.						
								Show in A	lert
Charge	Rate Lev	rel () 1 () 2	3 04	<b>○ 5</b>			Effe	ctively Comple	ete
								Ok C	ancel

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

All 'Statute of Limitation Dates' can be clearly identified by the Statute of Limitation symbol. **9**. See the following example.

Ca	ise:	AAAO	01/00	001	AA Lai	A Securities L ndlord Disput				0121121 MW
w									Ignore	Show m
w									Ignore	Show m
	\$	Search	n						Standard Vi	ew 📃
Act					Date	Time	Handler	Synopsis	Action Co	
ction	÷.	9	1		27 Oct 2014	16:08	CN	Statute of Limitations Date =06 Nov 2014	ADMSD	P ^
		0	1		06 Feb 2012	10:50	BS	Review File	G16	P
		0			01 Feb 2012	17:43	BS	Invoice No:225	DB01	P

# **Case Associates**

## What are Case Associates?

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

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

1. Open a case in the Case Diary.

Home Case Reports			Keyhouse Case Management (CN - C	arol Nolan )			Quick Search		- 0
	Phone Log Maint	ain Setup Help							
2. 🚔 👔									
dd Professional Print Prin	int Label								
Associates									
Client/Case	Case: BES001/000		ted astgate Avenue, Dublin 12.						01-69
Case Diary		Lease of Onit 33, Ea	asigate Avenue, Dublin 12.					F/e:	BS
Document Manager									
Current Client Details	Search								
Current Case Details Other Case Details	Туре	Name/Company	Address	Phone	Solicitors Ref	Email	CaseCode	Mobile	
Associates	County Registrar	Dublin County Registrar	Four Courts Dublin	01-8956231			BES001/0001		
Crucal information	Lending Institution	n First Active plc (First Active)	21 Main Street Donnybrook	01 4988888	123453	fa@indigo.ie	BES001/0001		
A/c Ledger	Purchasers	James Dillon	23 Smithfield Park, Rathmines,	01 498888		j.dillon@iol.ie	BES001/0001	087 6555555	
Time Ledger Debt Ledger	Solicitors	Allsop & Browne (Allsop & Bro	D Doorsett Charact	01 6655777	DEN00009	allsopbrowne.com	BES001/0001		
Reserve Ledger			00011121						
	Contact Details			Main Contacts D	etails (if applicable)				
		1es Dillon			etails (if applicable)				
		nes Dillon		Main Contacts D Name	etails (if applicable)				
	Name Jan Company 23 Address Rat	Smithfield Park, thmines,		NameAddress	etails (if applicable)				
Tacks	Name Jan Company 23 Address Rat Dul	Smithfield Park, thmines, blin 6.		Name Address Phone	etails (if applicable)				
Tasks Saurch/(non	Name Jan Company 23 Address 23 Rat Dul Phone 01	Smithfield Park, thmines, bin 6. 498888		Name Address Phone Mobile	etails (if applicable)				
Search/Open	Name Jan Company 23 Address Dul Phone 01 Mobile 087	Smithfield Park, thmines, blin 6. 498888 7 6555555		Name Address Phone	etails (if applicable)				
	Name Jan Company 23 Address Dul Phone 01 Mobile 087	Smithfield Park, thmines, bin 6. 498888		Name Address Phone Mobile	etails (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 Lead Professional Leader I 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.

Ca	se: BES001/0001							Tel: 01-698 F/e: BS
	Search							
	Туре	Name/Company	Address	Phone	Solicitors Ref	Email	CaseCode	Mobile
	County Registrar	Dublin County Registrar	Four Courts Dublin	01-8956231			BES001/0001	
	Lending Institution	First Active plc (First Active)	21 Main Street Donnybrook	01 4988888	123453	fa@indigo.ie	BES001/0001	
×	Purchasers	James Dillon	23 Smithfield Park, Rathmines,	01 498888		j.dillon@iol.ie	BES001/0001	087 6555555
	Solicitors	Allsop & Browne (Allsop & Bro	2 Baggott Street Dublin 2.	01 6655777	DEN00009	allsopbrowne.com	BES001/0001	
Г				L				
		Case: BES001/0001 Search Type County Registrar Lending Institution Purchasers Solicitors	Search           Type         Name/Company           County Registrar         Dublin County Registrar           Lending Institution         First Active plc (First Active)           Purchasers         James Dillon	Lease of Unit 33, Eastgate Avenue, Dublin 12.       Search       Type     Name/Company       Address       County Registrar     Dublin County Registrar       Dublin County Registrar     Dublin Sitest       Lending Institution     First Active pic (First Active)       21 Main Street     Domytrook       Purchasers     James Dillon       23 Smithfield Park;       Ratimines;       Couldware     Alfors B. Brows (Alfors B. Brows)	Lease of Unit 33, Eastgate Avenue, Dublin 12.       Search       Type     Name/Company       Address     Phone       County Registrar     Dublin County Registrar       Dublin County Registrar     Dublin Street       Dublin County Registrar     Dublin Street       Domyrook     01.4958283       Purchasers     James Dillon       23 Smithfield Park, County and Mirrow B, Stone Glasson C, Street     01.498888	Lease of Unit 33, Eastgate Avenue, Dublin 12.       Search       Type     Name/Company     Address     Phone     Solicitors Ref       County Registrar     Dublin County Registrar     Dublin County Registrar     Dublin County Registrar       Lending Institution     First Active pic (First Active)     21 Main Street Doomybrook     01 4988883     123453       Image: Participation     Parchasers     James Dillon     23 Solicitors Ref     01 498888       Solicitors     Allsop & Browne (Allsop & Browne)     2 Easgott Street Dublin 2.     01 6655777     DEN00009	Lease of Unit 33, Eastgate Avenue, Dublin 12.         Search         Type       Name/Company       Address       Phone       Solicitors Ref       Email         County Registrar       Dublin County Registrar       Four Courts       01-0956231       Image: County Registrar         Lending Institution       First Active plc (First Active)       21 Main Street       01 498888       123453       fa@indigo.ie         Image: Purchasers       James Dillon       R23 Smithield Park, 23 Smithield Park, 24 Smithines, 24 Smithines	Lease of Unit 33, Eastgate Avenue, Dublin 12.         Search       Solicitors Ref       Email       CaseCode         Type       Name/Company       Address       Phone       Solicitors Ref       Email       CaseCode         County Registrar       Dublin County Registrar       Pour Courts       01.4956231       Image: CaseCode       BES001,0001         Lending Institution       First Active plc (First Active)       21 Main Street       01.498888       123453       Fa@indigo.ie       BES001,0001         Image: Parchasers       James Dillon       23 Smithfield Park, Rathmines,       01.498888       123453       j.dillon@ioLie       BES001,0001         Solicitors       Allsop & Browne (Allsop & Browne       28 gggst Street Dublin 2.       01.6635777       DEN00009       allsopbrowne.com       BES001,0001

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)

			Add Case	Associate Professional					
Action									
Contact Associate	Party ples Print								
Associate Type	4	Associate	S						
Insurance Company Investment Company	^	Search							
Land Registry		Code	Name/Company	Address	Phone No	Category	Туре	Notes	
Lending Institution Local Authority		ACT001	Actons(Actons)	Solicitors 22/24 Lower Mount Street			Solicitors		
Other Party Plaintiff		ADA002	Brian P. Adams(Bria	Solicitors Cormac Street	0506 21		Solicitors		
Public Authority Purchasers		ADA003	Adams Corporate(A	Solicitors 9 Exchange Place			Solicitors		
Respondant (Family Law) Sheriff		ADAM01	Brian P. Adams(Bria	Solicitors Cormac Street,	0506-21		Solicitors		
Solicitors		AHE001	Marian Ahern(Mari	Solicitor Knockvicar			Solicitors		
Third Partie Town Agents		AHE002	Aherne Swift(Ahern	Solicitors 51 O'Connell Street	051 879		Solicitors		
Vendors	~	AHER01	Ahern O'Shea & Co	Solicitors 13/16 Dame Street	6794477		Solicitors		
								Ok	Cancel

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

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

### How to add a new case associate to a case

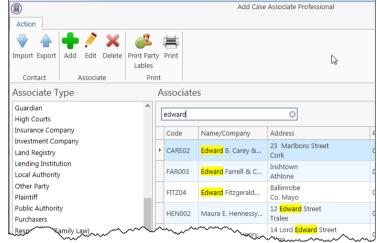
- 1. Open a case in the Case Diary.
- 2. Click on Associates on the Navigation panel
- 3. Click on Add Professional

dd Profess Associate

on the Home tab of the Ribbon.

- 4. Click on the category of case associate you want to add e.g. Bank.
- 5. 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 Add the following screen will appear.
- 8. Input the relevant information

		Details
Full Name:	Input the Full Name	Type * Banks Code * AIB002
_		Full Name" Allied Irish Bank Phone No 01-5236984
First Name		First Name Enter First Name Fax No 01-5962333
& Surname:	These will	Sumame         Enter Sumame         Home         Please Enter Home Number           Salutation         Sirs         Mobile No         Olease Enter Mobile Number
& Sumame.		Mobile NO Presse criter Mobile Patiente
	automatically be	Company         Alled Insh Bank         E-Mail         info@aib.ie           Title         Please Enter Title         DX Ref         Please Enter DX Ref
	inputted from the	Sutton Cross County Dublin Dublin
	•	Address Postal Code D13
	full name field	
	amend if required.	Search New Edit Delete
Salutation:	Input the Salutation	Relationship Name Phone Email Address
Company:	Input the company name	v
Title:	Input the title ie. Mr, Mrs etc.	Ok Cancel
Address:	Input the address	
Code:	Input a Code for this c the system will assign	ontact e.g. JAC001 for Jackson. If you leave the code blank a numeric code.
Code: Phone No:	•	a numeric code.
	the system will assign	a numeric code.



eneral	Other De	tails	Other Types	Notes	Other Case Invo	olvement	s				
Detail	le l										
	-										
Type *							Code *	AIB002			
	ame* Alli						Phone No	01-523698			
	lame Ent						Fax No	01-596233			
Surnar		ter Sur	name				Home		er Home Number		
	tion Sirs						Mobile No		er Mobile Number		
Comp			h Bank				E-Mail	info@aib.i	e		
Title			nter Title				DX Ref	Pleae Ente	r DX Ref		
		tton Cr blin 13					County	Dublin			
Addre		01111 2.5					Postal Code	D13			
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Searc	h				New Edit	Delete					
Relat	tionship		Name	P	none Er	mail			Address		
											^
											v
										Ok Can	

30

Chapter 4: The Case Diary

Mobile:	Input mobile phone number
E-Mail:	Input e-mail address
DX Ref:	Input the Document Exchange reference if applicable
Nominated:	Tick is this is the nominated contact.
County:	Input the county.
Post Code:	Input the post code.

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

### Input the following details as required:

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

- 10. Click **OK** to save. You will return then to the **Add case associate** window. The contact will then appear at the bottom of the window see the following example.
- 11. Click **OK** to save the new record. A message will appear stating the contact has been added successfully.



iridre Nolan  dress: *  B  ton Cross bilin 13  alutation Deirdre Phone: D1-8955645  file: Ms Fax: D1-8955624  Fax: D1-895562  Fax: D1-8955  Fax: D1-895  Fax: D1-8955  Fax: D1-895				A	.aa Assa	ociate Conta	ict				2
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Ite: anager of Sutton Cross Branch	E-Mail:		DeirdreNolan	@aib.ie		Mobile:	087-	963211			
Add Case Associate	Relationsh	hip:	Manager								
Add Case Associate	ote:										
Ok     Cancel             Other Details       Details       Tige       Part Details       Or Details       Disk Bank       E-Mail       Information       Phone No       Ox Ref       Place Inform Models Nonahore       Outhin       Obdinin 13       Obdinin 13       Details		f Sutt	on Cross Branch								-
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Address     Other Types     Notes     Other Case Involvements											
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Type *     Barks     V     Code *     AlB002       Fall Name     Allind trih Bark     Phore No     D1-5259643       First Name     Ender First Name     Farl No     D1-5596233       Saturation     Ender Summan     Farl No     D1-5596233       Saturation     Ender Summan     Farl No     D1-5596233       Coopmayn     Allind trih Bark     F     Phore No       Coopmayn     Allind trih Bark     F     Phore Inform Mohlen Number       Coopmayn     Allind trih Bark     F     Phase Ender Tox Ref       Dix Ref     Dix Ref     Country     Dublin       Dotain 13     Postal Code     D1-3	neral Othe	ir Detail	s Other Types No	ites Uther Casi	i thioivem	ients					
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Salutation Sin Model No Plane Terr Model Number Company Alled trish Bank E-Mail Info@alb.le Number Title Satton Cross Dubin 13 Address Dubin 13 Search New Kat Debte Relationship Name Phone Email Address Manager Deirdre Nolan 01-8955645 Deirdrek/olan@alb.ie AlB	First Name	Enter	First Name			Fax No	01-596233	33			
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Manager Deirdre Nolan 01-8955645 Deirdre Nolan@alb.ie AlB	Relations	hip	Name	Phone	Email			Address			-
v.	<ul> <li>Manager</li> </ul>					eNolan@aib.ie					^
											Ŷ
										Ok C	lancel

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

			Add Case	Associate Professional				
Action								
🚽 🔶 🕂 🗡	2	#						
Import Export Add Edit Delete Pr								
Contact Associate	Pri	nt						
Associate Type		Associate	S					
Accountants Agents	^	Search						
Auctioneers	-81	Code	Name/Company	Address	Phone No	Category	Туре	Notes
Banks Barristers		904440	bank of ireland	Sutton Cross Dublin 13			Banks	
Registrar for Births, Deaths & Marriage Beneficiary		AIB002	Allied Irish Bank(Alli	Dublin 13	01-5236		Banks	

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.

2.

### 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 <b>General tab</b>
	to amend
	details such
	as name,
	address etc.
Details	Click on the
	Details tab
	to add perso
Other Types	Click on the

(iii) Action								Add Case	Associate Professional	
Import Export Contact	Add		Delete	Print		y Prin	p t		ß	
Associate Ty	/pe					Asso	ciate	s		
Guardian High Courts Insurance Comp	2201/				^	edw			8	
Investment Con Land Registry	npany					<ul> <li>Cor</li> <li>CAI</li> </ul>	de RE02	Name/Company Edward B. Carey &	Address 23 Marlboro Street Cork	(
Lending Institut Local Authority						FAF	R003	Edward Farrell & C	Irishtown Athlone	C
Other Party Plaintiff						FIT	Z04	Edward Fitzgerald	Ballinrobe Co. Mayo	C
Public Authority Purchasers	/					HEI	N002	Maura E. Hennessy	12 Edward Street Tralee	C
	mily La	w)~~	~~~	~~~	$\sim$	nn,	~~~		14 Lord Edward Street	~.~

Details										
Type *	Solicitor	5			$\sim$	Code *	DUN011			
Full Name*	John Du	nne				Phone No	6773591			
First Name	Enter Fin	st Name				Fax No	6790390			
Surname	Enter Su	rname				Home	Please Ent	er Home Number		
Salutation	Mr. Dun	ne				Mobile No	Please Ent	er Mobile Number		
Company	John Du					E-Mail	Please Ent	er E-Mail Id		
Title	Please E	nter Title				DX Ref	DX 203003			
	Olympia	House ame Street				County				
Address	Dublin 2					Postal Code				
					01 00					
Search				New	💋 🗙 Edit Delete					
Relations	nip	Name	P	none	Email			Address		

onal information such as date of birth, occupation etc.

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

Other Details (optional)	Click on the <i>Other Details tab</i> to add a specific court and court date.
Notes	Click on the <b>Notes tab</b> 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.

### **Print Options**

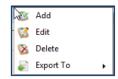
The following Print options are available on the Home tab of the Ribbon:



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



Select a Case Associate and then click Print Label.



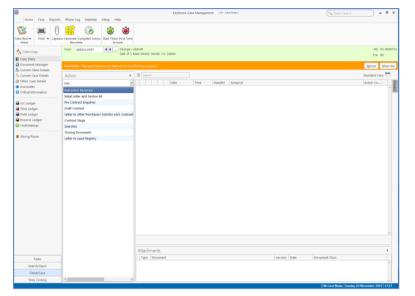
# **Generating Tasks**

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

## How to Generate a Task

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

SVM	Tip: For further
$\bigtriangledown$	rip: For Turther
	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:

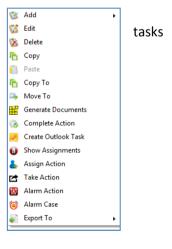
Method 1: **Double Click** the task you want to generate from the list of in the case plan.

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

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

Or

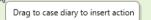
- 1) Right click on the task
- 2) Select Generate Documents from the pop-up menu.



# Working with Tasks in the Case Diary

## How to Insert Tasks in the Case Diary

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



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

## **Changing Tasks**

At times you may want to amend the

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

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

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

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

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

ction	Review File ( 1962 )	
ieneral Pro Case	perties         Attachment/Documents         Action Assignments         Other Notes           BLA001/0002	
Action Code	G16 Review File	
Date Subject	04 Nov 2014   Due Date 04 Nov 2014  Review File	
General	Email Appointment	
F/e Handle Team	er Carol Nolan V Commercial V	
Review File		
	I	

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

Action Code This will default to the current action code.

- Date You can amend the date of task if required. Click on the down arrow to reveal a calendar. Click on the required date.
- Due Date Click on the **down arrow** to reveal a calendar click on the required due date.
- Subject Click in the subject box and **amend** as required.

	Review File (1962)	- 0
Action		
Genera	te Document 🖉 Post Time 🦲 Note 🛛 🖓 Assign Action 🕅 Save	
철 Open A	sttachment 🖌 Complete 😒 Email	
🖢 Play Die	ctation 🛋 Print 🖆 Take Action	
	Default Actions	
General	Properties Attachment/Documents Action Assignments Other Notes	
Case	BLA001/0002 Sale of 2 Trinity Close, Rathgar, Dublin 6	
Action	Code G16 Review File	
Date	04 Nov 2014 V Due Date 04 Nov 2014 V	
Subjec		
Gen	eral Email Appointment	
F/e I	Handler Carol Nolan	
Tear	n Commercial 👻	
Revie	w File	
	T	
	*	
		k Cance

- F/e Handler Click on the drop arrow to select a handler; it will default to the current handler.
- Team Click on the drop down arrow to select a team; it will default to the selected handler's team.
- b. Click on the Properties tab to reveal the following screen.

Amend the following details as required:

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

			Review File (1962)	- ¤ ×
Publish	This applies only to data that is published to an external source. Using the option buttons <b>set</b> as required.	Default Actions		S Category Action Action Appointment Reminder Benail Phone Message Dictation Undertaking Statute Date Critical Date Court Date Court Date Scanned Post/Mail
Publish Status	This applies only to data that is published to an external sou sent.	urce. A <b>tick</b> will app	⊳ pear stating a co	real cancel at a c
Priority	Select the appr	ropriate priority st	atus.	
Other Properties	action, if it has associated doc	uments have been as required, e.g. t	if it is designated processed. The	on is a <i>Milestone</i> d as <i>Billable</i> or if the boxes may be checke an action, so that it

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

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

The following actions can be performed in this window

# **Open an attachment**

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

## Add an attachment to a task

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

## Amend an attachments properties

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

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

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

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

### **Delete an attachment**

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

ii. Click on delete attachment

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

ate Document	🖉 Post Time 📒 Note	<i>2</i>	Assign Action	Add Attachment	🚜 Precedent	1 History	🕲 Save
🎦 Open Attachment 🛛 🖌 Complete 🔶 Email				🔀 Edit Attachment	Copy		
lictation	🛎 Print 🛛 🖆 Take Acti	ion		📫 Delete Attachmer	nt 📋 Paste		
Defa	ult Actions			At	tachment		
I Properties	Attachment/Documents	Action	Assignments	Other Notes			
Date Entered	Document		Version	Doc Class	Track Reference	File Path	
10 Dec 2013	Letter to PIAB		1	Letters/Interparty Corr.	. 1364	\\hellie-PC\	Keyhouse
10 Dec 2013	Letter to Client		1	Letters/Interparty Corr.	. 1365	\\hellie-PC\	Keyhouse
10 Dec 2013	Index to Application		1	Document	1366	\\hellie-PC\	Keyhouse
10 Dec 2013	PIAB Bill of Costs		1	Document	1367	\\hellie-PC\	Keyhouse
	Attachment Defai Properties Date Entered 10 Dec 2013 10 Dec 2013	Attachment Complete Complete Complete Complete Complete Complete Complete Complete Complete Actions Perfuit Actions Perperties Attachment/Documents Date Entered Document 10 Dec 2013 Letter to PIAB 10 Dec 2013 Letter to Client 10 Dec 2013 Under to Application	Attachment Complete Demail Licitaion Privit Cate Action Default Actions Action Actions Action Action Date Entered Doc 2013 Letter to FAB 10 Dec 2013 Letter to FAB 10 Dec 2013 Letter to Clert 10 Dec 2013 Letter to Clert 10 Dec 2013 Letter to Application	Attachment Complete Semail icitaion #R Pint @Take Action Defuilt Actions Attachment/Documents Action Assignments Date Entered Document Version 10 Dec 2011 Letter to PAB 1 10 Dec 2013 Letter to Client 1 10 Dec 2013 Letter to Client 1	Attachment Complete Demail Ecition Complete Demail Default Actions Action Default Actions Action Learning Complete Attachment Default Actions Action Assignments Other Notes 10 Dec 2013 Letters 0 FMAB 1 Letters/Interparty Corr. 10 Dec 2013 Letter to CRett 10 Dec 3 Letters to Apple Complete Attachment 1 Decument 1 Letters/Interparty Corr. 10 Dec 2013 Letter to CRett 1 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 1 Decument 1 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter to Apple Complete Attachment 2 Letters/Interparty Corr. 10 Dec 2013 Letter Interparts Attachment 2 Letters/Interparts Corr. 10 Dec 2013 Letter Interparts Attachment 2 Letters/Interparts Corr. 1 Dec 2013 Letter Interparts Attachment 2 Letters/Interparts Corr. 1 Dec 2013 Letter Interparts Attachment 2 Letters/Interparts Corr. 1 Dec 2013 Letter Interparts Attachment 2 Letters/Interparts Corr. 1 Dec 2013 Letter Interparts Attachment 2 Letters/Interparts A	Attachment Complete Email Schule Attachment Copy icitation Perfuit Attachment Pate Defuit Attachment Pate It Properties: Attachment Nocuments Action Assignments Other Notes Date Entered Document Version Doc Class Tack Reference 10 Dec 2013 Letter to FAB 1 Letters/Interparty Corr 1364 10 Dec 2013 Letter to Cleft 1 Letters/Interparty Corr 1364 10 Dec 2013 Letter to Application 1 Document 1366	Attachment ✓ Complete © Email School (Complete © Email Provided (Complete © Email Provided (Complete Attachment © Copy Default Actions Attachment © Paste Attachment

🌗 Organize 👻 🏭 Views					6
Favorite Links Documents Facently Changed Desktop	Name preTest Aspell PRE UPGR ReportsCR		Туре	Size	
More » Folders V Programs Aspell PRE UPG ReportsC ReportsC	ReportsCR ReportsCR SQL Script User Repo SoftPSX ABCSelect AccProDo ACCRUAL:	old s rts			
SQL Scrip Ilcer Ren	尾 active		•	All Files	

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

### **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.

	Document Properties	×							
Details File Information									
Document Name:	Letter to Lending Institution2								
Document Date:	04 Nov 2014								
Document Class:	Letters/Interparty Correspondance	~							
Document Type:	Document								
Ē	Ok Cancel								

- vi. A message will appear asking you to confirm the update, click Yes to confirm
- vii. A copy of the document will then appear in the document list.
- 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.

		)					Letter	to Lending Ir	stitutio	n ( 1950	5)				-	×
	A	ction														
	ĥ	Gene	rat	e Document	Pos 🕜	st Time 📒 N	lote	🚜 Assign	Action	💰 De	lete Assignm	ents 🚺	Save			
	<u>N</u>	Oper	n At	ttachment	🗸 Cor	mplete 🔗 E	imail									
	ŧ	Play	Dic	tation	🚐 Prir	nt 🛃 T	ake Actior	ı								
				Defa	ult Acti	ons					Assignment					
	(	Gener	al	Properties	Attac	hment/Docu	ments	Action Assign	ments	Othe	r Notes					
		By Action For			For		Date Assign	ed	Time Assigned	Date Return	ed	Time Returned	Assigned By			
		F	C	arol Nolan(C	N)	Delegated	Brian Sw	eeney(BS)	04 No	2014	18:54				CN	^
L			C	arol Nolan(C	N)	Created	Carol No	lan(CN)	04 No	/ 2014	17:24				CN	
(		tion					Letter to	Lending Inst	itution	(1955)					- 0	×
h			ite	Document	Post	Time 🚬 No	te	🚜 Assign A	ction 1	🖄 Save						_
	<u>.</u>	Open J	Atta	achment	🖌 Com	plete 🔶 Em	ail									
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				Defau	It Action	ns										
	G	eneral	Τ	Properties	Attachr	ment/Docum	ients Ac	tion Assignm	ients	Other I	Notes					
		Draft 3		document												

### **Deleting a Task**

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

## **Copying a Task**

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

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

### Moving a Task to another matter

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

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

# [♥] TIP: TO DELETE, MOVE OR COPY MULTIPLE TASKS :

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

1	Add +
1	Edit
8	Delete
ħ	Сору
	Paste
Ph.	Сору То
۵.	Move To
<b>₽</b>	Generate Documents
1	Complete Action
<b></b>	Create Outlook Task
N	Show Assignments
2	Assign Action
Ľ	Take Action
1	Alarm Action
۱	Alarm Case
	Export To

### Assigning a Task to Another Handler

- 1. **Insert** the task in the case diary.
- 2. Right click on a task the following menu will appear
- 3. Click on Assign Action. Assign Action
- 4. A screen will appear listing all resources.
- 5. Double Click on the **resource** person you want to assign the task.
- 6. Check the **Release Action** box to remove the task completely from your task list.

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

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

	Add	•
1	Edit	
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ъ	Сору	
	Paste	
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<b>13</b>	Move To	
<b>₽</b>	Generate Documents	
10	Complete Action	
2	Create Outlook Task	
N	Show Assignments	
2	Assign Action	
Ľ\$	Take Action	
Ø	Alarm Action	
۲	Alarm Case	
	Export To	•

Search     Image: Search       Code     Name       Number of Due Tasks     Team       Units     Units	
Code Name Number of Due Tasks Team	
Code Name Number of Due Tasks Team	
Code Name Due Tasks Team	
Addition Addition	1
AM Anne Mellon 5 COM	
BS Brian Sweeney 7 COM	
🐣 COM Commercial COM	
😃 LIT Litigation LIT	
MW Martina Winters 1 LIT	
SK Stephen Keogh 1 COM	

Chapter 4: The Case Diary

# 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.

Client/Case	Са	se: E	3LA001/00		rdon T. Blac A Walkinsto	:k wn Crossroad:	s, G. Black
💾 Case Diary							
🚺 Document Manager 🗞 Current Client Details		S d	Iraft	8			
Scurrent Case Details	Action			Date	Time	Handler	Synopsis
Other Case Details	ion	•		29 Oct 2014	19:52	CN	Draft Bill Draft Bill No: 264
Associates			0	12 Dec 2013	10:52	CN	Undertaking Created:
<ol> <li>Critical Information</li> </ol>		<b>S</b>	<u>ی</u>	25 Apr 2012	10:05	BS	Email From:Martina Winters - Draft Pleadings
		<b></b>	<u>ی</u>	20 Apr 2012	14:47	BS	Email To: - RE: Draft Pleadi
📓 A/c Ledger		<b>S</b>	<u>م</u>	29 Feb 2012	11:51	BS	Email From:Martina Winters - Draft Civil Bill
💐 Time Ledger		<b></b>	<u>ی</u>	22 Nov 2011	09:36	MW	Email From:Martina Winters - Draft Pleadings
📓 Debt Ledger		<b></b>	۵	10 Nov 2010	14:29	BS	Email From:Brian Sweeney - Draft Civil Bill
Reserve Ledger	m		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	man man	~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

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

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

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

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

### How to filter Case Diary Columns

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

andler		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

select

# 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.

	s Phone Log Maintain Setup	Help								
🚔 🕕 👼		be PDF Viewer								
Print Properties Reclassif Document(s)	y Email Compile Brief Brief P		rd Worksha Compare	are						
Client/Case	Case: BLA001/0001	Gordon T. Black								Tel: 01 4
Case Diary		RTA Walkinstown Cr	ossroads,	3. Black						F/e: BS
Document Manager	Search							Standard		Letter to Client
Current Client Details										L
Surrent Case Details	Type Document Name					Document Class	Source	From	To	Gordon T. Black
Ø Other Case Details	Letter to Doctor					Letters/Interparty Corr			^	23 Ellis Park,
Associates	Letter to Doctor					Letters/Interparty Corr				Rathmines, Dublin 6
Critical Information	Letter to Solicitor					Letters/Interparty Corr				Duomi o.
	E Letter to Solicitor		1	04 Nov 2014	04 Nov 2014	Letters/Interparty Corr	Case			
🖥 A/c Ledger	📧 Letter to John Dunne		1	04 Nov 2014	04 Nov 2014	Letters/Interparty Corr	Case			
🛢 Time Ledger	<ul> <li>Letter to Client</li> </ul>		1	04 Nov 2014	04 Nov 2014		Case			
🛢 Debt Ledger	Letter to Client		1	04 Nov 2014	04 Nov 2014		Case			
🕽 Reserve Ledger	Contracts version 2		1	04 Jun 2014	10 Dec 2013	Document	Received E-m			OUR REF YOUR REF DATE BS.hb.BLA001/0001 1234T 04 November 2014
Undertakings	Tips for using Gmail		1	14 Nov 2013	09 Dec 2013	General	Received E-m	mail-noreply	Keyho	
	Microsoft Outlook Test M	essage	1	14 Nov 2013	09 Dec 2013	General	Received E-m	training.keyho	Trainir	
Strong Room	image001		1	27 Nov 2013	09 Dec 2013	General	Received E-m	melinda@key	Trainir	Re: RTA Walkinstown Crossroads, G. Black
	Gordon T. Black RTA Walk	instown Crossroads. G	1	27 Nov 2013	09 Dec 2013	General	Received E-m	melinda@key	Trainir	Dear Mr Black
	keyhouse		1	12 Dec 2013	05 Dec 2013	Letters/Interparty Corr	Captured			
	20090820191608sharpsca	nner@kevhouse.ie 200			05 Dec 2013	1 1 2	Captured			
	Benefits of working paper	- / -			05 Dec 2013		Captured			Yours sincerely,
	Brief_Gordon T Black RTA				11 Apr 2013		Captured			
	Brief_RTA Walkinstown Cro				11 Apr 2013		Captured			
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Einzarial Statement	in the second		23 May 20		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~stured~	AM (A		Brian Sweeney

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.

Client/Case	C	ase:	BLA001/0001 Gordon T. Black RTA Walkinstown Cr	ossroads,	G. Black					
💾 Case Diary										
🚺 Document Manager	8	ple	eading 🛞						Standard	View
💑 Current Client Details				Version	Diary Date	Date 🔻	Document Class	Source	From	То
🔍 Current Case Details		-		version	Diary Date	Date	Document class	Source	FIOII	10
Other Case Details	Þ	2	RE: Draft Pleadi	1	20 Apr 2012	20 Apr 2012	Document	Sent E-mail	Martina Winte	
Associates		P	blac01-0001	1	25 Apr 2012	17 Apr 2012	Memo	Received E-m	Martina Winte	'Marl
Critical Information	Г	2	Draft Pleadings	1	25 Apr 2012	17 Apr 2012	Document	Received E-m	Martina Winte	'Mart
		P	blac01-0001	1	22 Nov 2011	22 Nov 2011	Document	Received E-m	Martina Winte	marti
m	J.,	\sim	Marson Mars	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	warman and	the second second	www.	marti

- 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

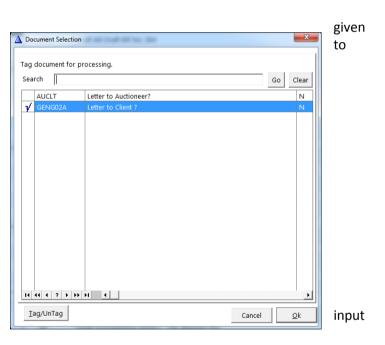
Some documents are optional. Users are the choice to select the documents they want process. The following will occur:

- 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 a name. If this is the case the following will occur.

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



Matter:	BLA001/0001 Gordon T. Black	
	RTA Walkinstown Crossroads, G. Black	
Document Na	ame: Letter to Client ?	Ok Cance
Class/Catego		Ok Ca

- 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.

- Keyhouse
- 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 solicitor and the document being processed letter to solicitor.

- 1. The following dialogue box has appeared requesting the user to select a Solicitor for this letter.
- 2. There is two solicitors assigned to this case you can tag the solicitor provided then click on the **amend** button

 \triangle Change to add a reference.

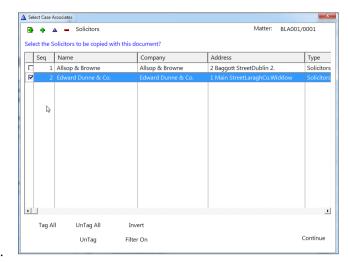
- 3. **Input** the other side's reference in "Other Ref" (circled in red, right)
- 4. Or if the solicitor displayed is not the solicitor you want to write to click on the green plus with the yellow folder

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

+ ct the 1	Solicitors Solicitors to be copied with	th this document?	Matter: BLA00	01/0001
Seq	Name	Company	Address	Туре
1	Allsop & Browne	Allsop & Browne	2 Baggott StreetDublin 2.	Solicitors
2		Edward Dunne & O		Solicitors
				1
Tag A	ll UnTag All UnTag	Invert Filter On		Continue

٢					Add 0	Case Asso	ciate					×	
General	Associate Co	ntact [Details	Other Details	Other Types	Notes	Other Case In	nvolvements	Sequence	1			
Details													
Type *		Solicitor	s		\sim	Code	•	904449					
Full Na	me *						e No	Please Enter	Phone Number				
First Na	ame	Please Enter First Name					0	Please Enter Fax Number					
Surnam	Please Enter Sumame					Home		Please Enter	Home Number				
Salutati	lation Sirs					Mobil	e No	Please Enter	Mobile Number				
Compa	mpany Please Enter Company Name					E-Mai	1	dlit@nicholl-	solrs.ie				
Title	Please Enter Title				DX Re	ef	768954 Blac	krock					
		23 Main				Nomi	nated						
∆ddres		Blackroc County I				Count	ty	Please Enter	County				
	-					Posta	l Code	Please Enter	Postal Code				
Specifi	c Information	for case											
Othe	r Side Details					Insu	rance Details						
Our	Code		Please E	nter Our Code		Our	Code	Ple	ase Enter Our Co	de			
Othe	r Reference	<	NAN/D	CB007/1234	\geq	Insu	urance Referen	ce Ple	ase Enter Insuran	ce Refer	ence		
										Ok		ancel	

- 5. A screen will reappear listing the solicitors on the case.
- 6. Check the appropriate box(es) to **tag** the required solicitor(s).
 - Note If you tag two solicitors two documents will be generated.
- 7. Click Continue.
- 8. Word will open displaying the letter to solicitor.
- 9. Edit the document in Word as normal as required.
- 10. Save any changes and Print as required.



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

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

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

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

elect Case Ass	ociates							×	J
	- Doctor	rs				Matter: BL	A001/00	001	1
교 lect the Do	ctors to be co	pied with th	nis document?						
Seq 1	Name		Compa	ny	Address			Туре 🔶	
									so
									ar
1								• •	
								•	
Tag All	UnTag	All	Invert					•	
Tag All	UnTag	All					Co		
Tag All	UnTag	All	Invert Filter On				Co	• •	
Tag All	UnTag	All					Co		
		All					Co	ontinue	
			Filter On	Saund America III					
Case Associate		ф <u>А</u>		Saved Queries			ж	ontinue	
Case Associate		search:	Filter On	-	🗆 Search all Ca		X	ontinue	
Case Associate		♣ ▲ Search: Code	Filter On	ny	Search all Ca	tegorie:	Phone	Go Clear	
Case Associate		Search:	Filter On	ny s ()	Search all Ca Address The Surgery23 Heath Ro	tegorie:	Phone	Go Clear	
Case Associate			Filter On Name / Compa George Gibbon Dr Death ()	nys ()	Search all Ca Address The Surgery23 Heath Ro The Surgery	tegorie: badTerenureD	Phone 01 234555	Go Clear	
Case Associate			Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg	ny s () s ()	Search all Ca Address The Surgery23 Heath Re The Surgery The Surgery2 Church St	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777	50 Clear	
Case Associate		Search: Code 000002 904379 BLO001 QUIR01	Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	nys ()s (Search all Ca Address The Surgery23 Heath Ro The Surgery The Surgery2 Church St The High StreetCo Kerr	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777 41213112	50 Clear	
Case Associate			Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	ny s () s ()	Search all Ca Address The Surgery23 Heath Ro The Surgery The Surgery2 Church St The High StreetCo Kerr	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777	50 Clear	
Case Associate		Search: Code 000002 904379 BLO001 QUIR01	Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	nys ()s (Search all Ca Address The Surgery23 Heath Ro The Surgery The Surgery2 Church St The High StreetCo Kerr	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777 41213112	50 Clear	
Case Associate		Search: Code 000002 904379 BLO001 QUIR01	Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	nys ()s (Search all Ca Address The Surgery23 Heath Ro The Surgery The Surgery2 Church St The High StreetCo Kerr	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777 41213112	50 Clear	
Case Associate		Search: Code 000002 904379 BLO001 QUIR01	Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	nys ()s (Search all Ca Address The Surgery23 Heath Ro The Surgery The Surgery2 Church St The High StreetCo Kerr	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777 41213112	50 Clear	
Case Associate		Search: Code 000002 904379 BLO001 QUIR01	Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	nys ()s (C Search all Ca Address The Surgery23 Heath R Surgery2 The Surgery2 Church St The High StreetCo Kerr StillorganCo Dublin	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777 41213112	50 Clear	
Case Associate		Search: Code 000002 904379 BLO001 QUIR01	Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	nys ()s (Search all Ca Address The Surgery23 Heath Ro The Surgery The Surgery2 Church St The High StreetCo Kerr	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777 41213112	50 Clear	
Case Associate		Search: Code 000002 904379 BLO001 QUIR01	Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	nys ()s (C Search all Ca Address The Surgery23 Heath R Surgery2 The Surgery2 Church St The High StreetCo Kerr StillorganCo Dublin	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777 41213112	50 Clear	
Case Associate		Search: Code 000002 904379 BLO001 QUIR01	Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	nys ()s (C Search all Ca Address The Surgery23 Heath R Surgery2 The Surgery2 Church St The High StreetCo Kerr StillorganCo Dublin	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777 41213112	50 Clear	
Tag All		Search: Code 000002 904379 BLO001 QUIR01	Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	nys ()s (C Search all Ca Address The Surgery23 Heath R Surgery2 The Surgery2 Church St The High StreetCo Kerr StillorganCo Dublin	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777 41213112	50 Clear	
Case Associate		Search: Code 000002 904379 BLO001 QUIR01	Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	nys ()s (C Search all Ca Address The Surgery23 Heath R Surgery2 The Surgery2 Church St The High StreetCo Kerr StillorganCo Dublin	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777 41213112	50 Clear	
Case Associate		Search: Code 000002 904379 BLO001 QUIR01	Filter On Name / Compa George Gibbon Dr Death () Dr Simon Blogg John Quirke (Jd	nys ()s (C Search all Ca Address The Surgery23 Heath R Surgery2 The Surgery2 Church St The High StreetCo Kerr StillorganCo Dublin	tegorie: padTerenureD reetDublin 12	Phone 01 234555 4566777 41213112	50 Clear	

- 5. Click on the **Green Plus** to add the new Doctor. See the section on **Adding a New Case Associate** for further details.
- 6. Then click on **Select Select**. The following screen will reappear listing the doctor assigned to the case.

Select Case					
8 +	Doctors			Matter:	BLA001/0002
elect the	Doctors to be copied wit	th this document?			
Seq	Name	Company		Address	Туре
	1 John Quirke	John Quirke		The High StreetCo Kerry	Doctors
			Con and a second		
		-			
Tag /	All UnTag All	Invert			
	UnTag	Filter On			Continue
	Sinag	Filer Off			

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

Example 3: Letter to Lending Institution – Where there is only one lending institution and its 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**.
- If the question is not applicable click N/A.
- 4. The answer is then inserted in the Word document.
- 5. The answer will be stored in the **other case details screen**.
- 6. To amend click on the other case details shortcut

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

7. To edit **Double click** on an item, make your amendments and click **Ok** to save them.

The next time any document containing this field is generated, it will include the amended answer.

🛆 Update User Variable			 X
General Properties			
BLA001/0002 Gordon T. Black Sale of 2 Trinity Close, Rathgar, Dublin 6			
Secretary's Reference			
I			
			<< >>
	N/a	ОК	Cancel

Case Details Search Order Case Details Group Other Case Details Detail Value Arouge: Critical Information List the Contents passing with the house (if any).	
Current Case Details Oraup Conter Case Details Detail Detail Value Control Information Control Informatio	
Other Case Details Detail Value Associates Critical Identition Critical Identition	
Associates / Group:	
Critical Information	
List the Contents passing with the house (if any). None	
Contents NOT passing with property ? (if any) N/A	
A/c Ledger Sale Price of property (e.g. 100,000.00) 200,000.00	
Time Ledger Deposit Amount in full (e.g. 10,000.00) ? 20,000.00	
Debt Ledger Description of the property for the Contract. in the property known	as Folio 1234F
Reserve Ledger Copy File Plan Undertakings Title Deeds to be listed in Documents Schedule in the Contract. Copy Mortgage	
Is the property serviced with drainage? "Yes" or "No" Yes	
Strong Boom	

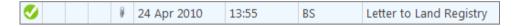
	N	Maintain Other Case Details	×
General	Properties		
BLA00	1/0002	Gordon T. Black	
		Sale of 2 Trinity Close, Rathgar, Dublin 6	
Conte	ents NOT pas	sing with property ? (if any)	
Curt	ains in sitting	room	
		Ok	4
			-

Working with Documents already Processed

Marking a Task as Complete

Tasks after being generated 4 should be marked as complete to reflect this. Otherwise the task will appear incomplete in your to-do list, the case diary and case diary reports. When a task is marked complete, follow-up actions may be inserted in the case diary. The Case Diary lists outstanding and completed tasks in date order reflecting the progress of the case.

- 1. Click on the Task in the Case Diary.
- Click on Complete Action complete Action available on the Home tab of the Ribbon. A tick on a green disc will be shown beside the task/action, indicating that it is complete.



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

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

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

)			Follow-Up Action	×
			Drag a co	lumn header here to group by that column	
		Decision	Next Action	Next Action Description	
F		Do	S4	Draft Contract	^
					~
				ОК	
5					

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

	Keyhouse Case Manage	ment (CN - Carol Nolan)		(a Quick Search –
Home Case Reports	Phone Log Maintain Setup Help			
N 🚔 🔒	🔂 🚵 👗 🐞			
Item - Print - Captu	e Generate Complete Action Start Timer Post Time			
Actions Print Captur	Documents Accionts Accounts			
Client/Case	Case: ABA001/0001			Tel: 01-290
	Family Law			F/e: AM
Case Diary				
Oocument Manager Current Client Details				Ignore Show
urrent Client Details urrent Case Details	Search	Standard	View	Preview
ther Case Details				Description
ssociates	2 · · · · · · · · · · · · · · · · · · ·	Action Co	0_ P ^	Description
ritical Information		G26	P	Dear Sirs,
	Theorem O7 May 2014 08:36 CN Court Date Image: Construction of the construction	G26	P	Den ous,
/c Ledger	CN Re: [REL002/0002] Sarah Rei] S S S S S S S		P	
ime Ledger	 Z2 May 2012 09:11 BS Email From that From that an winters - Z0 Apr 2012 09:18 BS Phone Call to David re Assets 		P	As dicsussed on the phone I have attached
ebt Ledger	S Phone Call to David Te Assets		P	the served Civil Bill for you to review.
eserve Ledger	S PED 2012 11:51 BS Email From Winters *		P	
ndertakings	Image: Second	G16	P	
rong Room	Image: Solution of the second secon	ADMUD		If you have any questions please do not
and the second se	Image: Second and a second and and a second and a second and and a second and a second and and and a second and and and and and and and and and a	PHO	P	hesitate to contact me.
	Image: Control of the state of the		P	
	V V V V V V V V V V V V V V V V V		P	
	Image: Construction		P	Regards,
	V 01 Oct 2011 15:01 BS Initial Attendance	601	P	
		001		
				Brian.
				Ph: 01-8899666
				PH. 01-8899000
			~	
	Attachments			
Tasks		Version Date Document Class		
	Draft Civil Bill	1 22 May 2012 General	^	
Search/Open	Civil Bill (CC) RTA_132	1 22 May 2012 General		
Client/Case				

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

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

Changing the Name and Class of a Generated Document

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

A	Attachments								
	Туре	Document							
F	(E	Letter to Lending Instituti Properties History							

	Document Properties	×
Details File Informa	ation	
Document Name:	Letter to Lending Institution2	
Document Date:	04 Nov 2014	
Document Class:	Letters/Interparty Correspondance	~
Document Type:	Document	
Ē	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.

Home Case	Reports	Phor	ne Log	Maintain	Setup He	lp		
🖹 🚔	0		2		١	Ö		
New Item Print Actions			rate Co locument		on Start Timer Acco			
<u> </u> Client/Case		Case	ABA	001/0003	•••	David Abrahan Sale of 22 O'C		Dublin 1
💾 Case Diary								
Document Manag		8	Searc	:h				
lient Det		Þ			Date	Time	Handler	Synopsis
Surrent Case Deta Other Case Detail		Action	U		02 Nov 201	4 18:13	AM	Undertaking Created:
Associates	-		B		02 Nov 201	4 17:16	CN	Initial Letter and Section 68
📵 Critical Informatio	n		₽ ₽		02 Nov 201	4 17:08	CN	Initial Letter and Section 68
			🥑		01 Oct 201	4 17:08	CN	Instruction Received
📓 A/c Ledger								
🞴 Time Ledger								
📓 Debt Ledger								
📓 Reserve Ledger								
Undertakings								
Strong Room								

3. Any Undertakings in the case will be displayed.

Home Case Reports	e D	Phone Log Maintain	Setup Help			
Client/Case	0	Case: ABA001/0003	David Abrahams Sale of 22 O'Connell	Street, Dublin		
🗊 Document Manager 🚴 Current Client Details		Search				
Surrent Case Details		Date	Туре	Who	Value	Details
Other Case Details Associates		02 Nov 2014	Financial	ABC Accountants (ABC Accountants)	1,000.00	Pay for copy of files
 Critical Information 		02 Nov 2014	Financial	Abercorn (Abercorn)	5,000.00	Deposit to be returned
I A/c Ledger I Time Ledger Debt Ledger Reserve Ledger		1				
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 pro	ovided ticl	< if you v	vant a co	mment	added to the ledger
Date	This is actual date	۵		Add t	Jndertaking	×
	of the	General Extra Notes Client: ABA001			Add As Comment to I	Ledger
	undertaking. Click	Matter: 0003 Date	Sale of 22 O'Connell Stre 02 Nov 2014	et, Dublin 1	Diary Warning Date	02 Nov 2014
		Туре		Given or Received		Commercial or NonCommercial
	the 🛄 button to	Financial	Documents O	Given 🔘	Received O	Commercial O NonCommercial O
	select a date from	Authorised Fee Earner Undertaking To	AM AIB002	>	Ann Mellon Allied Irish Bank (Allie	d Irish Bank)
	the calendar.	Who Allied Irish Bank (Allied				
Diary Warning Date	This is the date the	Details Release Funds				
	Undertaking	Value	10,000.00		Dealing Number	Please Enter Dealing Number
	Action will appear	Status	Pre Registration	~		
	on the Fee Earners Task List as a To Do Item. This will					
	default to a					Ok Cancel
			ا ما:ماد م م	the dev		
		to ameno	CIICK ON	the dow	/n arrow	<i>i</i> to view a calendar and
	select a date.					
Туре	Check the appropriate Documents .	e button f	or the ty	/pe of ur	ndertakir	ng i.e. Financial or
Given or Received	Select whether the ur	ndertakin	g has be	en given	by you o	or received by you.
Commercial	Select whether the ur	ndertakin	g is com i	mercial o	or non-c	ommercial
Authorised by FE	Click on the down arr undertaking.	ow to sel	ect the r	elevant F	ee Earn	er against the
Undertaking to	Click on the down arr is been given or recei		ect the r	elevant (Case to v	vhom the undertaking
Who	This will default to the	e selectec	case as	sociate.		
Details	Input a description of	f this unde	ertaking.			
Value	Input the amount the	e undertal	king is fo	r.		
Status	Click on the down arr	ow and se	elect the	required	d status.	
Dealing Number	Input the dealing num	nber				

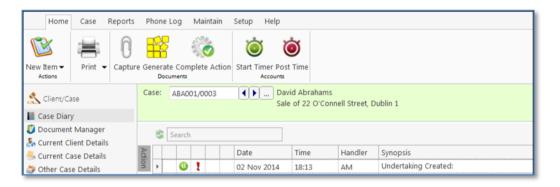
4. Click **OK** to save the undertaking will now be visible in the undertaking screen.

Home Case Repor	ete [Phone Log Maintain	i Setup Help			
Client/Case	1	Case: ABA001/0003	David Abrahams Sale of 22 O'Connell Stre	eet, Dublin		
Case Diary						
🔰 Document Manager		Consult				
🖕 Current Client Details		Search				
Current Case Details		Date	Туре	Who	Value	Details
🕻 Other Case Details		02 Nov 2014	Financial	ABC Accountants (ABC Accountants)	1,000.00	Pay for copy of files
Associates	Ľ	02 1107 2014	Financia	ABC ACCOUNTAILS (ABC ACCOUNTAILS)	1,000.00	Pay for copy of files
Critical Information		02 Nov 2014	Financial	Abercorn (Abercorn)	5,000.00	Deposit to be returned
📱 A/c Ledger						
Time Ledger						
Debt Ledger						
Reserve Ledger						
undertakings	nn,	mining				

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. 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.

	(1943)
Action	
Gener	ate Document 🖉 Post Time 🦲 Note 🛛 🚜 Assign Action 🛛 🕲 Save
철 Open	Attachment 🛛 🖉 Complete 🎅 Email
Play D	ictation 🛋 Print 🖆 Take Action
	Default Actions
Genera	Properties Attachment/Documents Action Assignments Other Notes
Case	ABA001/0003 Sale of 22 O'Connell Street, Dublin 1
Actio	n Code ADMUD Undertakings
	02 Nov 2014 V Due Date 02 Nov 2014 V
Date	
Subje	ict
Ge	neral Email Appointment
F/e	Handler Anne Mellon
Tea	
Tec.	Connector
	lertaking Created:
	e: 02 Nov 2014 e: Financial Given
	horised By: AM Anne Mellon
	lertaking to: AIB002(Allied Irish Bank (Allied Irish Bank))
	ails: Release Funds 5: Allied Irish Bank (Allied Irish Bank)
	ie: 1000.00
	us: Pre Registration
Dea	ling Number:
	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 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

1					Keyhouse Case Management	N - Carol Nolan)					
Home Case Reports	s	Phone Log Maintair	n Setup H	elp							
Print - Add Edit Dele Undertaking		Q ischarge									
Client/Case	0	Case: ABA001/0003	()	David Abrahams Sale of 22 O'Connell Stre	eet, Dublin 1						
じ Document Manager 💑 Current Client Details	[Search									
🍜 Current Case Details	Date		Type		Who	Value	Details				
Other Case Details Associates		02 Nov 2014	Financial		ABC Accountants (ABC Accountants)	1,000.00	Pay for copy of files				
 Critical Information 	ŀ	02 Nov 2014	Financial		Abercorn (Abercorn)	5,000.00	Deposit to be returned				
📓 A/c Ledger 翼 Time Ledger		02 Nov 2014	Financial	U Add U Edit	Allied Irish Bank (Allied Irish Bank)	10,000.00	Release Funds				
Debt Ledger				😃 Delete							
Reserve Ledger				😃 Discharge							
Undertakings				Export							

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

)		Discha	rge Undertaking		
eneral Extra Notes	Undertaking Logs				
	Sale of 22 O'Connell Stre		Add As Comment to I	-	
Date	02 Nov 2014	~	Diary Warning Date	02 Nov 2014	\vee
Туре		Given or Received		Commercial or NonCommercial	
Financial (8)	Documents O	Given 💌	Received O	Commercial NonCommercial	
Authorised Fee Earner	AM		Ann Mellon		
Undertaking To Who	ABE001	V	Abercorn (Abercorn)		
Details					
Deposit to be returned			Dealing Number	Diasse Enter Dasling Norther	
Value	5,000.00		Dealing Number	Please Enter Dealing Number	
Deposit to be returned Value Status Discharge Description		V	Dealing Number DischargeDate	Please Enter Dealing Number 02 Nov 2014	¥
Value Status	5,000.00	C			⊻ Cance

)			Edit	Undertaking			
eneral Extra Notes	Undertaking Logs						
Client: BLA001 Matter: 0001	RTA Walkinstown Crossro	ads G. Black		Add As Comment to L	edger 🗌		
Date	12 Dec 2013		~	Diary Warning Date	12 Dec 2013	2	
Туре		Given or Re	ceived		Commercial or Non	Commercial	
Financial	Documents O	Given 🔘		Received O	Commercial 〇	NonCommercial	
Authorised Fee Earner	CN		¥	Carol Nolan			
Undertaking To Who	TSB001		*	Trustee Saving Bank			
Details							
overdraft							
Value	5,000.00			Dealing Number	Please Enter Dealing N	umber	
Status	Please Select Status		~				
						Ok	Cancel
						JK (Juncer

Undertaking Reports

Undertakings by Matter

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

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

Ĩ	Undertakings By Matter Undertakings By Client
	Undertakings By Client

Underta	kings by Matter
Ente	r Parameters
Undertakings Up To Date	04 Nov 2014
Matter Code	BLA001/0001
Not Discharged, Discharged, All	
	N
	4
	Run

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

DO	c 🔰 🕽	PDF XLS							
i e	1 🗐 🗍	ype the text to find 🛛 👻 📄							
					Soo G	rabbit & Runne			
				<u>Undertaking</u>	s Repo	ort For Matter	BLA001/0	<u>0001</u>	Data Da
					<u>Up 1</u>	<u>o 04/11/2014</u>			
F	E	Matter	Undertaking Date	Туре	Auth.By	Dealing Number	GivenRec	Status	
	BLA001	Gordon T. Black							
B	35	BLA001/0001 RTA Walkinstown Crossroads, G		Document For: Allsop & Browne Title deeds	MW		Given	To: Allsop & Browne	
				Financial	CN		Given		
				For: Trustee Saving I overdraft	Bank			To: Trustee Saving Bank	
		Number of Financial Number of Document	1						
		Total Count of Undertakings:	2					Fina	ancial Value:
									>

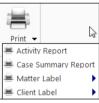
- 6. Click on print or click on one of the following options available on the report toolbar:
 - Click on Doc to open a copy to Word
 - Click on PDF
 - Click on XLS to open a copy in Excel.

How to view Critical Information and Print Reports

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

-										
Print -	Case: BLA001/0001	Gordon T. E	Black stown Crossroads.	G. Black						
Case Diary	······	1018 110160	stown crossrouus,	O. DIOCK						
Document Manager	Only talk to Gordon Black Senie	Nr.								
🕵 Current Client Details 🌭 Current Case Details	only talk to cordon black sen	//								
Other Case Details	Show Alert									
Associates	Account Summary				Action Summ	nary				
Critical Information	Debtors A/c	147.35	3 Year 7 Month	20 Days O/s	Start Date	08 Maj	/ 2010	File Colour		
	Outlay A/c	3,336.61	11 Month	1 Days O/s	Solicitor	Brian S	weeney	Statute Date	18 Apr 2015	
A/c Ledger	Outlay Budget	0.00			Case Status		Who	Date	Description	
Time Ledger Debt Ledger	Current Outstanding Fees	121.78			Last Action		BS	08 Apr 2015		nitations Date = 18/04/2015 Changed From 25
Reserve Ledger	Client A/c	0.02			Last Mileston	e Action	00	00 Apr 2020	Statute of En	mations bate = 10/04/2015 changed from 25
Undertakings	Client Current	0.02	1		Next Action	e Action	MW	10 Dec 2013	Undertaking	Created: Date: 10/12/2013 Type: Document Gi
	Client Deposit	0.00	1		Last Record	Timo	SK	24 Nov 2011	Attendance	created. Date. 10/12/2013 Type. Document of
Strong Room	Current Locked up value	7,043.13	Percentage of Est	imated Fee	Last Record	lille	JK	24 1407 2011	Attendance	
	Total Work In Progress	3,559.17								
	Write off time	0.00			Description	Value		Who	Given/Receive	a
	Fees issued to date	60635.00			Title deeds	0.00	Allso	op & Browne	Given	-
	Fees To Date + WIP	64,194.17			overdraft	5,000.00	Trustee	Saving Bank	Given	-
	Estimate Fees	0.00								
	Draft Invoices	0.00	1							
	Last Bill Date	12 May 2011	1							
	Expected Bill Date	¥								
	Possible value to the client	0.00]							
	Work in Progress									
	Stephen Keogh	5:21		1,273.67						
	Martina Winters	4:01		804.00						
	Brian Sweeney	4:26		707.50						
		16:30		3,559.17						
	Activity									
	Document Drafting	4:46		1,190.00						
	Advice	3:30		875.00						
Tasks	Court Attendance	4:01		804.00						
Search/Open	Attendance	1:11		294.17						

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



- For Activity Report Click on Activity Report The current case code will appear; **amend** if required **Set** the **date** parameters **Tick** the items you want included e.g. Emails, attachments etc. Click **Run** Summary Report Click on Case Summary Report
- The current case code will appear **amend** if required. Then click **Run.**
- Print Labels Click on Matter Label or Client label as required

Other Case Diary Functions

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

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

Chapter 5: The Task Manager

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

Navigating the Task List

The Task Screen

Home Case Reports	Phone Log	Maint Too	lba	r			Jilouse	use management i en secontes				Concessaron
Actions	Generate Co Documen Handler Ca		,	Searc	h Bo	сх]				Preview
	Search 🔮									Standard Vi	ew 📃	Letter to Lending Institution 🤙
Team tasks		Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action	Diary Date		
Day's tasks		🕻 🍽 04 Nov 2014	19:31	GLE001/0001	CN	сом	CN	Charlie Gleeson Lease of South West Georges Street	Review File	04 Nov 2	P	
Next week's tasks Next month's tasks	B	🍽 04 Nov 2014	19:09	GLE001/0001	CN	сом	CN	Charlie Gleeson Lease of South West Georges Street	Letter to Solicitor	04 Nov 2	P	
Overdue tasks	₩	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 BS.HB.BLA001/0002 04 November
Outstanding tasks Last week's tasks		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	2014 04 November
ast month's tasks III tasks		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
My Overview	B2	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
Taakuda		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	ws	04 Nov 2014	17:24	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Letter to Client ?	04 Nov 2	P	Document
	₩	04 Nov 2014	17:24	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Letter to Lending			Preview Pane
	B	04 Nov 2014	17:19	BLA001/0002	CN	сом	CN	Gordon T. Black Sale of 2 Trinity Close, Rathgar, Du	Task	list	J	
	E	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
	Ħ	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
	E	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	
	Ħ	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	
	E	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 Client/Case	E	03 Nov 2014	16:23	ABA001/0003	CN	сом	CN	David Abrahams Sale of 22 O'Connell Street, Dublin 1	Letter to Solicitor	03 Nov 2	P	
Time Costing				Count=60				1				

The Home tab in Task Manager

	New	Click on the New to add any of these tasks.	Matter Action			
	New	check of the New to dud dry of these tasks.	Note			
New Item Actions			🛸 Email			
			2 Appointment			
			📞 Phone Message			
			Dictation			
			📄 Draft Invoice			
			📼 Request Cheque			
			🛕 Conflict Search			
Print -	Printer	Click to print a reports on your task list.				
0 Capture	Capture	Click on capture to launch the document capture program to import documents or folders of documents or images.				
Generate	Generate	Click to generate a document for a selected action.				
Complete Action	Complete Action	Click to mark a task as complete.				

Task Views

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

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

Using Different Layouts/Views

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

		Standard View
	View	
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 you mouse over **Preview** to the located to 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.

%	Review	8
----------	--------	---

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

Ha	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
			1		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
			1		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
			1		28 May 2014	08:36	BLA001/0001	CN	COM	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	Review 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
	~~	~	ىلىر		19 Dec 2013	14:52	All and a start and a start and a start	~~~~	~~~~	~~~~~	Melinda FitzGerald	Beri	madera 2013	Dun

3. To clear the search results click Clear.

How to Sort Column Headings in the Task Manager

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

How to Filter the Task Manager

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

Sea	irch								
		 Date		Time	Case Code	A Handler (Blanks)	Ta	am	F
•	1	04 Nov 201-	4	18:16	BLA001/00	(Non blanks)		м	¢
	:	04 Nov 201	4	18:15	BLA001/000	AAA001/0001 AAA001/0003		м	¢
Ħ		04 Nov 201	4	17:26	BLA001/000	ABA001/0001 ABA001/0003		м	¢
Ħ		04 Nov 201	4	17:25	BLA001/000	A66001/0007		м	0
B		04 Nov 201	4	17:25	BLA001/000	BIL001/0001 BLA001/0001		м	0
		04 Nov 201	4	17:24	BLA001/000	BLA001/0002 BLO001/0005		м	0
B		04 Nov 201	4	17:24	BLA001/000	CLI001/0001 DEA001/0000		м	0
B		04 Nov 201	4	17:19	BLA001/000	FIS001/0001 FIT002/0001		м	0
₩		04 Nov 201	4	17:11	BLA001/000	GLE001/0001 KEL002/0001		м	0

and

How to Group by a column heading in the Task Manager

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

Handler Carol Nolan 🔽 🗹 OutStanding Only												
ŝ	Se	earch]						
					Date	Time	Case Code		Handler Team From	Client/Case(Matter)		
Þ			2	1	04 Nov 2014	19:31	GLE001/00	Ź↓ Z↓	Sort Ascending Sort Descending	Charlie Gleeson Lease of South West Georges Str		
	<mark>₿</mark> ₿			1	04 Nov 2014	19:09	GLE001/00	2¥	Clear Sorting	Charlie Gleeson Lease of South West Georges Str		
	₿ ₿				04 Nov 2014	19:07	ABA001/00	_	Group By This Column Show Group Panel	David Abrahams Sale of 22 O'Connell Street, Dubli		
			2		04 Nov 2014	18:16	BLA001/00		Show Column Chooser Best Fit	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D		
			2		04 Nov 2014	18:15	BLA001/00	•	Best Fit (all columns)	Gordon T. Black Sale of 2 Trinity Close, Rathgar, D		
	1			~~	04 Nov 2014	17:26	BLA001/00		Filter Editor CN COM CN	Gordon T. Black Sale of 2 Trjan Schwar, Briddan, Dr.		

- 6. 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
Ι	► Case G	ode:	AAA001/0001							
	► Case C	ode:	AAA001/0003							
	∡ Case C	ode:	ABA001/0001							
	વ		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

 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	20
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.





Open Document

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

omplete Action

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

How to Tag Several Tasks and Mark as Complete

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

How to Alarm an Action/Case

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



ppear.		🔯 Al	arm Action	
	Maintain TaskAlarm	1		×
MatterCode	BLA001/0001		Assign To	
Alarm	Letter to Solicitor		Carol Nola	in
Date	04 Nov 2014 💙 Time 5:15		O All Delega	tes
	Letter to Solicitor		Delegat	es
			Carol Nolan	
Text				
			ОК	Cancel

How to Push a Task

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

How to Create a Outlook Task

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

How to Tag All Tasks

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

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

💫 🛛 Tag All

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.

G	Push Action 😡 🛛	•		To date
N	Create Outlook Task		7	Plus 7 days
0	Show Assignments		14.	Plus 14 days
\$	Assign Action		31	Plus 31 days



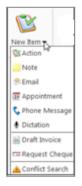
d Sta	Add	
	Edit	
8	Delete	
Ď	Open Document	
H	Generate Documents	
-	Print Document	
٩	Play Dictation	
80	Complete Action	
G	Push Action	Þ
1	Create Outlook Task	
N	Show Assignments	
۵.	Assign Action	
	Take Action	
T	Alarm Action	
۱	Alarm Case	
2	Tag All	
20	UnTag All	
F	Export To	Þ

Tag All

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 eg. Note. The following window will appear.

1				Add Action				-	
Action		O a a a							
		Post Time 🦲		🚜 Assign Action	Save 🛛				
_	tachment								
Play Dict		ault Actions	ake Action						
General		Attachment/Docu	iments 🗛	tion Assignments	Other Note				
) 1				of 2 Trinity Close, R					
Case		1/0002	Sale o	of 2 minity close, K	atrigal, Dubili	10			
Action	Code Select	a action code							
Date	09 No	v 2014	Y Due I	Date 09 Nov 2014		~			
Subject									
Gene	ral Email	Appointment							
ſ									
	andler Car			~					
Team	Cor	nmercial		~					
							Ι		
								Ok Ca	nce



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

Subject Input a subject

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

Description Input a description in the box provided.

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

How to Edit a Task

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

	Letter to Solicitor (1964)	- 🗆 ×
Action		
Generate Doc	cument 🖉 Post Time 🦲 Note 🥔 Assign Action 🔯 Save	
🖄 Open Attachn	ment 🖌 Completਏ 훘 Email	
Play Dictation	n 🛎 Print 🖆 Take Action	
	Default Actions	
General Prop	perties Attachment/Documents Action Assignments Other Notes	
Case	GLE001/0001 Lease of South West Georges Street	
Action Code	G03 Letter to Solicitor ?	
Date	04 Nov 2014 💙 Due Date 14 Nov 2014 💙	
Subject	Letter to Solicitor	
General	Email Appointment	
F/e Handle	er Carol Nolan	
Team	Commercial	
Letter to So	licitor	
Letter to 30		
	Ok	Cancel

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

How to Delete Tasks

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

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

Assigning Tasks

How to Recognise Assigned Tasks

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

83

		Date	Time	Case Code	Handler	Team	From	Client/Case(Matter)	Action
1	P	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.

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.

					Let	ter to Solic	itor (19	64)				- 0	
Actio	on												
Ge	enera	ate Document	🕜 Pos	t Time 📒 N	lote	🚜 Assign	Action	🚜 De	lete Assignme	nts 🔞 Save			
o o	pen /	Attachment	🖌 Cor	mplete 🔗 E	mail								
Pla	ay Di	ictation	🛎 Prir	nt 🛃 T	ake Action								
		Defa	ult Acti	ons					Assignment				
Ger	neral	Properties	Attac	hment/Docu	ments Ac	tion Assigr	nments	Othe	r Notes				
		Ву		Action	For		Date Assign	ed		Date Returned	Time Returned	Assigned By	
Þ		Carol Nolan(CN	۷)	Delegated	Stephen Ke	eogh(SK)	04 Nov	2014	19:39			CN	^
		Carol Nolan(CN	V)	Created	Carol Nola	n(CN)	04 Nov	2014	19:09			CN	

How to Assign a Task to Another Handler

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

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.

)			Se	lect Resource			
Re Da	sour	ces					
Da	te	09 Nov 201	14	▼ Time :	13:05		
	Sear	ch					
		Code	Name		Number of Due Tasks	Team	
Þ		ADM	Admin			LIT	1
		AM	Anne Mellon		5	COM	
		BS	Brian Sweeney		8	COM	
	22	COM	Commercial			COM	
	22	LIT	Litigation			LIT	
		MW	Martina Winters		1	LIT	
		SK	Stephen Keogh		2	COM	
_		2					_
		~					

Note

3.

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.

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

Ca	arol Nolan	🕂 🗹 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					

🖆 🛛 Take Action

.

Task List Options

Print your task list

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

Har	ndler Diary	×
Enter	Parameters	
Include Closed		
Select the Handler	CN 🗸	
Select the Status	Outstanding 🗸	
From Date	02 Mar 2001 15	
ToDate	09 Nov 2014 15	
Action Type	All	
Select the field to Sort By	Priority 🗸	
Exclude Email Actions		
Exclude Phone Calls	\checkmark	
Exclude Notes and Reminders	\checkmark	
	Run	Close

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

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

Run

3. You may print the report or open a copy in: Wiew Report DOC LPDF - 🕒 🍋 a 🔁 📃 AP Soo Grabbit & Runne Data Date: 09/11/2014:15:43 Handler Diary Date:02/03/2001 ToDate:09/11/2014 Status: Outstanding Carol Nolan Action Type: All Matter Client Name From Diary Code Date Action Id Time Description Status Item Type **Diary Description** High Priority FIT002/0001 19/12/2013 Melinda FitzGerald CN G16 Review File 1903 14:53:57 Sale of lands in wicklow NA Action Not Applicable KEL002/0001 26/12/2013 Sarah Kelly CN G16 Review File 1865 12:04:37 Purchase of Property NA Action Not Applicable KEL002/0001 07/05/2014 Sarah Kelly CN G16 Review File 11:49:29 Purchase of Property NA 1861 Action Not Applicable BLA001/0001 28/05/2014 Gordon T. Black CN G16 Review all contracts 1817 08:36:03 RTA Walkinstown Crossroads, G. Black NA Action Not Applicable BLA001/0001 04/06/2014 Gordon T. Black G16 CN incoming copies doc 1837 17:12:35 RTA Walkinstown Crossroads, G. Black NA Action Not Applicable AAA001/0001 27/10/2014 AAA Securities Ltd CN ADMSD Statute of Limitations Date =06 Nov 1932 16:08:00 Landlord Dispute NA Statute Date 2014 Not Applicable 01/11/2014 Noel Billing ADMUD BIL001/0001 CN Undertaking Created: Undertaking Date: 01 Nov 2014 Type: Financial Given RTA Brennanstown Valley Roundabout 11:49:41 1931 NA Not Applicable Authorised By: AM Anne Mellon BLA001/0002 04/11/2014 Gordon T. Black CN G16 Review File 18:15:00 Sale of 2 Trinity Close, Rathgar, Dublin 6 1961 NA Action Not Applicable BLA001/0002 04/11/2014 Gordon T. Black G16 Review File CN 1962 18:16:39 Sale of 2 Trinity Close, Rathgar, Dublin 6 NA Action Not Applicable 🔂 🗔 100% —I-Page 1 of 4 | Main Report



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.

🚽 Export To 🔋 🕨	6	PDF
S.	B	Excel
	E	Text
	R	Rich Text

- 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 wordprocessors, 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.

	r 🕨 Keyhouse (\\hellie-PC) (T:) 🕨	•	Search Key	/house (\\hellie-k	·() ,
Organize 🔻 New folde	r			-	2
🔶 Favorites	Name	Date modified	Туре	Size	
Nesktop	퉬 keyhouse	03/11/2014 16:21	File folder		
🗼 Downloads	khframework	22/10/2014 10:59	File folder		
📃 Recent Places	퉬 NEW Sites Blank Database Scripts	22/10/2014 10:44	File folder		
	퉬 PUR	03/11/2014 16:18	File folder		
🥃 Libraries	Jan SAL	03/11/2014 16:18	File folder		
Documents	🐌 StandardReports	22/10/2014 15:29	File folder		
J Music					
Pictures					
😸 Videos					
🜏 Homegroup					
🖳 Computer		G₂			
Local Disk (C:)					
Keyhouse (\\helli					
🐿 Network 👻					
File name:					
	ile (*.xlsx)				

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

Chapter 6: Keyhouse Capture

How to Capture a File

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



0

Capture

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

0 *		Keyhouse - Capture	cuments	
Detions				🔗 🖬 🦉 '
	New Case A Wizard			
select documents to capture			Preview Panel	
File Name	Class Type			
# 🗌 🚞 Integration Services Script Comp.		22/10/20 ^		
Templates		22/10/20		
4 🗌 🚞 Integration Services Script Task		22/10/20		
Templates		22/10/20		
# 🗌 🚞 Keyhouse Manuals		09/11/20		
New Version		10/11/20		
Old Version		28/10/20		
New Version (2)	.21P	02/11/20		
New Version (3)	.729	09/11/20		
New Version	ZP	08/11/20		
Sapter 1 Introduction	.000			
 My Music 		08/02/20		
My Pictures		08/02/20		
My Videos		08/02/20		
a 🗌 늘 sdocs		02/11/20		
keyhouse		02/11/20		
Sale		02/11/20		
# 🗌 늘 SQL Server Management Studio		03/11/20 *		
Garden Backup Files				

- 4. Click on the file and click on the Open button. The chosen document will be listed on the left-hand side of the **Capture Documents** window.
- 5. Tag the document to be captured. There will be a Preview of the document in the Preview Panel, on the right of the window.

(m) -	Keyhouse - Capt	ture Documents — 🗖 🗙
Options		^ 🔗 🖬 🧏 🝸 🙁
Image: Select Select Assign Filtered Remove Create New Case File Folder Docs Docs filter Shortcut Wizard Capture Document Options	1	
Select documents to capture		Preview Panel 4
Search		been possible to reach an agreement to the satisfaction of the Plaintiff herein.
File Name Class Type	Modifi	Conclusion
IPAB08A Grounding Affi .DOCX	26/10/ ^	14. In the circumstances I say and believe that the sum of [please insert the up to date figure which is due and owing and specify the principal and the interest] and continuing interest, remains due and owing by the Defendant to the Plaintiff over and above all just credits and allowances as appears in the statement of account at Tab B of the Booklet of Exhibits.
		15. I say and believe that the Defendant is not only indebted to the Plaintiff on foot of which the Plaintiff has instituted the present summary proceedings but I am advised by McDowell Purcell, Solicitors, and believe, that the Defendant does not have a <i>bona</i> <i>fide</i> defence to the Plaintiff's claim herein, either in law or on the merits, and that any appearance entered is solely for the purpose of delay.
Total size of checked	files: 0 Bytes	 I therefore pray this Honourable Court for the reliefs sought in the notice of motion herein.

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

Provide the following information:

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

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

- 8. 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.

How to Capture a Folder

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



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

(iii) =			Keyhouse -	Capt	ure Documents _ 🗖 🗙
Options					^ 🔗 🖬 🐚 🍸 🤅
Select Select Assign Filtered Remove Create File Folder Docs Docs filter Shortcu Capture Document Options					
Select documents to capture					Preview Panel #
Search					
File Name	Class	Туре	Modified		AFFIDAVIT OF FIONA CASSIDY
keyhouse			02/11/20	^	(liberty to enter final judgment)
▶ 🗌 🚞 Sale			02/11/20		
🔺 🗌 🗁 SQL Server Management Studio			03/11/20		I, FIONA CASSIDY, Manager, Bank of Ireland Mortgages, New
Backup Files			03/11/20		Century House, Mayor Street Lower, IFSC, in the City of Dublin aged
Code Snippets			22/10/20		18 years and upwards MAKE OATH AND SAY as follows:-
Projects			22/10/20		
Settings			22/10/20		
Templates			22/10/20		1. I am employed by the Plaintiff as a Manager of the Legal Team in
🔺 🗌 🗁 Visual Studio 2005			22/10/20		the Mortgage Arrears Support Division and I am duly authorised by
Projects			22/10/20		the Plaintiff to make this Affidavit for it and on its behalf, and I do so
Templates			22/10/20		from my own knowledge and from a diligent perusal of the
🔺 🗌 🗁 Visual Studio 2008	R		22/10/20		Plaintiff's books and records, save as where otherwise appears
Templates	45		22/10/20		and where so otherwise appearing I believe to be true and
aug		.TXT	20/09/20		accurate. Such statements herein as relate to my own acts and
Default		.RDP	22/10/20		deeds I say are true and such statements herein as relate to the
desktop		JNI	23/08/20		acts and deeds of any other person, I say and believe are true.
expenses		.RTF	26/08/20		2. I beg to refer to the pleadings and proceedings already had herein
🕨 📝 🗋 JPAB08A Grounding Affidavit(Sin		.DOCX	26/10/20		when produced. I make this Affidavit for the purpose of grounding
Sept		.TXT	09/10/20	\mathbf{v}	an application on behalf of the Plaintiff for liberty to enter final
	Total :	ize of checke	ed files: 0 Bytes		judgment against the Defendant.

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

Type .TPS .DOC .DOC	Modified 03/11/20 ^ 11/09/20 18/01/20 18/01/20		Our		Preview Panel		
.TPS .DOC .DOC	03/11/20 11/09/20 18/01/20		Our		Preview Panel		
.TPS .DOC .DOC	03/11/20 11/09/20 18/01/20		Our				
.TPS .DOC .DOC	03/11/20 11/09/20 18/01/20	-	Our				
.DOC .DOC	11/09/20 18/01/20		Our				
.DOC .DOC	18/01/20		Our				
.DOC		11		Ref:	[MAT:FECode]/[MAT:Code]	Your	Ref:
	18/01/20		Oui	Ref.	[MAT.FECODE]/[MAT.CODE]	Tour	DATE:
			Today]				UNIL.
.DOC	18/01/20	Ш.	1000/1				
.DOC	18/01/20						
.DOC	18/01/20	Ш.	[CAN:N	lame.Doc	tors#??]		
.DOC	11/09/20		[CAN:A	ddress.D	octors#??]		
.DOC	18/01/20	Ш.					
.DOC	18/01/20						
.DOC	18/01/20						
.DOC	18/01/20						
.DOC	24/08/20		Re	Our clie	ent: [CNT:Name] of [CNT:Linear	Address]	
.DOC	18/01/20					naurcaaj	
.DOC	21/02/20						
.DOC	24/08/20						
.DOC	24/08/20		Dear [C	CAN:Salut	t.Doctors#??]		
	DOC DOC DOC DOC DOC DOC DOC DOC DOC DOC	.DOC 18/01/20 .DOC 11/09/20 .DOC 18/01/20 .DOC 24/08/20 .DOC 24/08/20	.DOC 18/01/20 .DOC 11/09/20 .DOC 18/01/20 .DOC 18/01/20 .DOC 18/01/20 .DOC 18/01/20 .DOC 18/01/20 .DOC 28/01/20 .DOC 24/08/20 .DOC 21/02/20 .DOC 24/08/20 .DOC 24/08/20	.DOC 18/01/20 .DOC 24/08/20 .DOC 24/08/20 .DOC 24/08/20 .DOC 24/08/20	.boc 18/01/20 .boc 24/08/20 .boc 24/08/20 .boc 24/08/20 .boc 24/08/20	.boc 18/01/20 .boc 11/09/20 .boc 18/01/20 .boc 24/08/20 .boc 24/08/20 .boc 24/08/20 .boc 24/08/20	.boc 18/01/20 .boc 11/09/20 .boc 18/01/20 .boc 24/08/20 .boc 24/08/20

Type

Tip: To filter a column heading:

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



 $\overset{\texttt{W}}{\overset{\texttt{V}}}$ Tip: To exclude a file remove the tick.

- 11. 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.
- 12. Click **Assign Docs** to assign the documents in the folder to a Case, Handler and Action. The following screen will appear.

	Case/Matter	BLA001/0002			
	Handler	Admin 🗸			
	Action Code				
à	Document Class	Please select a document class			
	Assign Date	Please select a date	[OR]	✓ Use file date	
	Diary Description				
		Note: Leave description blank to use document name as th	ne descri	ption	
	Capture settings	Remove captured documents from original location		Import documents to a	single action
		Set captured document as complete		Set action as generated	

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

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

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

Chapter 7: The Template Library

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

How to Search for precedent documents

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

Home Case Report	s	Phone Log Mainta	in Setup He	lp		
	flict S	Search GoTo				
Search/Open		Letter	8			
All Matters Recent Matters		Work Flow	Document Code	Document Name	Document Class	Document Descriptio
My Contacts	•	General Office W	AUCLT	Letter to Auction	CCA	
Advanced Search		General Office W	GENG02A	Letter to Client ?	CLI	
My Invoices		General Office W	GENG03A	Letter to Solicito	LTR	Letters/Int
A My Cheques		General Office W	GEN04	Letter to Lendin	LTR	<mark>Letter</mark> s/Int
A Phone Log		General Office W	GEN05	Letter to Local A	LTR	<mark>Letter</mark> s/Int
		General Office W	GENG07	Letter to Barriste	COS	
Strong Room		General Office W	GEN08	Letter to Doctor ?	LTR	<mark>Letter</mark> s/Int
🔯 Document Search		General Office W	GENG09A	Letter to bank?	LTR	<mark>Letter</mark> s/Int
🗑 Template Library		General Office W	GEN09	Letter to Insuran	COS	
		General Office W	GENG12A	Blank <mark>Letter</mark> ?	COS	
man a m		General Office W	GENARO	Letter to Client C	CLI	
	\sim	Souther	×	white the star	~~~~~	\sim

- 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 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.

Work Flow 9

Work Flow ⁹

5

System Act

Sale

Sale

Sale

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).

∕Ž↓	Sort Ascending							
Z↓	Sort Descending							
₽¥	Clear Sorting							
2	Group By This Column							
-	Show Group Panel							
	Show Column Chooser							
F-	Best Fit							
	Best Fit (all columns)							
Ŷ	Filter Editor							
/ork	Flow Document							
	(Blanks)							
retor	(Non blanks)							
ster	n Acl General Office Work							



System Actions

eg.

Chapter 8: Conflict Search

What is a Conflict Search?

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

How to do a Conflict Search

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

Home Case Reports	Phone Log Ma	iintain Setup Help			
	t Search e related GoTo				
Search/Open	Search				
All Matters	Code	Last Accessed	File Colour	Name	Description
Recent Matters	BLA001/0002	10 Nov 2014 18:38:13		Gordon T. Bla	Sale of 2 Trinity Close, Rathgar, Dublin 6
My Contacts	ACC001/0000	10 Nov 2014 18:33:13		Accord Music	0000 Matter
Advanced Search	ABB002/0001	10 Nov 2014 17:56:51		Abbey & Proc	Commercial
	ABB002/0000	10 Nov 2014 17:56:49		Abbey & Proc	0000 Matter
My Invoices	► ABB002/0002	10 Nov 2014 17:56:44		Abbey & Proc	Share Holding Agreement
A My Cheques	ABB002/0003	10 Nov 2014 17:56:32		Abbey & Proc	Purchase of Number 5 Main Street Dublin
😚 Phone Log	ABA001/0003	09 Nov 2014 16:47:55		David Abraha	Sale of 22 O'Connell Street, Dublin 1
😂 Strong Room	ABB001/0007	09 Nov 2014 16:47:40		George J Abb	Sale of 1 Main Street, Howth, Co. Dublin
🔯 Document Search	ABB001/0006	09 Nov 2014 16:47:38		George J Abb	Sale 7 Church Street Rathgar
🍘 Template Library	ABB001/0005	09 Nov 2014 16:47:29		George J Abb	RTA The Rise, Stillorgan
	ACC001/0001	09 Nov 2014 15:55:39		Accord Music	Purchase New office 56 Second Street
	many	Nov 2014 13:3		Gleeson	Lease of South West Georges Street

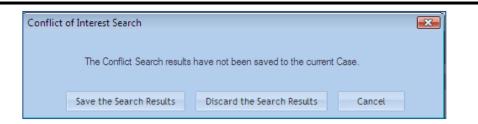
- 2. Click on **Conflict Search** icon on the Case tab.
- 3. A Conflict of Interest Search window will appear.
- 4. The types of information you can search for are the Name, PPS number, telephone number or address.
 - a. Click in the search box, **input** the first search criteria e.g. Stephen Keogh

Stephen Keogh	0
Stephen Keogn	

Case: CAM001/0001 - Tony _Marie	Campbell/Sale 6 Brighton S	guare Drive		
	Conflic	t of Interest	Search	_
Search Names	1		٥	
		Search Gose		
		Searce Rose		

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"	0

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**.

(R)	Conflict of Interest Search						
	Case: BOU001/0001 - Claire Bo Save	urke/Personal	Injury at work	Back – modify s	earch		
	File <u>N</u> ame				Cancel		
	ConflictOfInterestReport_Stephen_	Keogh_and_othe	rs				
0	🗎 🍓 🖓 🍫 🔶	1 / 3	ی 🖲 🖲 75% -	😝 🔂 Find	·		
ß							
111							
			Confli	ict of Interest Report	t 📄		
		Case: BOU001	/0001 - Claire Bourke/Per	•			
					-		
		Searched r	· · ·	-	Date:	10 July 2011	
			2134590F "Keogh H				
			Kogirn	olungo			
			Confli	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 Services Ltd -v- Stephen Keogh	Address: Grange House, Baggot Street, Dublin Client Name: International Business Services L			
		Matter	IBS001/0015 Stephen Keogh	Address: Grange House, Baggot Street, Dublin Client Name: International Business Services L			

See the following example.

					Date	Time	Handler	Synopsis
•					10 Nov 2014	20:55	ADM	Conflict Search
- H	 stand and a	~~~~	~~~~	~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~

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

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

Chapter 9: The Strong Room

What is the Strong Room used for?

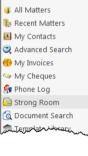
The Strong Room is used to keep track of the locations of physical items such as wills, deeds, tapes, share registers etc. it records details of the physical storage location of the item, which client owns the item and which case it is connected to.

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

How to Search for an Item

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





🔍 Search/Open

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

63

[kenneth	8					Standard View 🗍
	Item Code	Matter Code	Item Type	item Desc	Status	Open Closed	Destroy Date
1	HDeeds	BUN001/0000	DEE	Kenneth Bunson Associates/Deeds of 22 O'Connell Street	I	0	11 Nov 2014
	WillBUN	BUN001/0001	WIL	Kenneth Bunson Associates/Will of Kenneth Bunson	I	0	11 Nov 2014

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

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.

		Strong roon	n - Add new File		×
General Item	Diary Client Info				
Item Type *	Papers	*	Item Code *	PAPBUN	
Client code	BUN001		Matter code	BUN001/0001	
Description *	Agreement Papers				
	I				
Location	Dublin	~	Box No	2	
Search code	PAPDUBBUN		Fee earner	Brian Sweeney	
Entry and Des	troy Date				
Entry date	12 Nov 2014	~	Destroy date	Select destroy date	
Open	Close				
				Ok	incel

Fields marked with an asterisk are required.

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

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

How to Withdraw an Item

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

Provide the following information:

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

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

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

How to Replace/Return an Item

- 1. Open the Strong Room screen, search for and select the item you want to replace.
- 2. Click on the **Replace File** icon on the Home tab.
 - **Note** if the **Replace File** tool is greyed out the item is already checked in.
- 3. The following Replace File dialogue box will appear.
- 4. Select the physical location, e.g. Box 2, to which the item is being returned.
- 5. Click **OK**. You will see a message asking you to place the item in the selected location.
- 6. Click **OK**.



Strong Room - Withdraw File	×
You will find Will of Kenneth Bunson at File Room, Box No: 4	
Q	

	Strong Room - Replace File	×
Item Code	WillBUN	
Description	Kenneth Bunson Associates/Will of Kenneth Bunson	
Client Code	BUN001	
Location	Box 2	
	Ok Cancel)
) Strong Room - Replace File	×
n in	Please replace the item Will of Kenneth Bunson to BOX2, Box No.4	
	Ok	

How to view the History on a file/item

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

1				Keyhouse Case Management (CN - Carol Nolan)	Quick !	Search	- (
Home Case Rep	orts Phone Log M	aintain Setup	Help				
Print Add File W	ithdraw File Replace Fi		iary y				
Search/Open	Search						Standard
😻 All Matters	Item Code ⁹	Matter Code	Item Type	Bem Desc	Status	Open Closed	Destroy D
Recent Matters	ABC000	A88001/0001	PAP	George J Abbott/Personal Papers	0		
My Contacts	DEE	TAR001/0001	DEE	George Tarrant/Deeds	1	0	
💐 Advanced Search	ABB0010001	A88001/0001	DEE	George J Abbott/	0	0	
🚺 My Invoices	12345		BAK	Friday 1 Backup	1	0	01 Jan 20
My Cheques	AAA0010001	AAA001/0001	WIL	AAA Securities Ltd/My Will	0	0	
for all in the	AAA0010001	AAA001/0001	WIL	AAA Securities Ltd/SK Will	I	0	27 Aug 20
🚱 Phone Log		AAA001/0001		AAA Securities Ltd/My Will 2		0	

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



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

5. Click Cancel to exit this screen.

Chapter 10: Time Recording

Time Recording in the Case Diary

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

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

 \odot

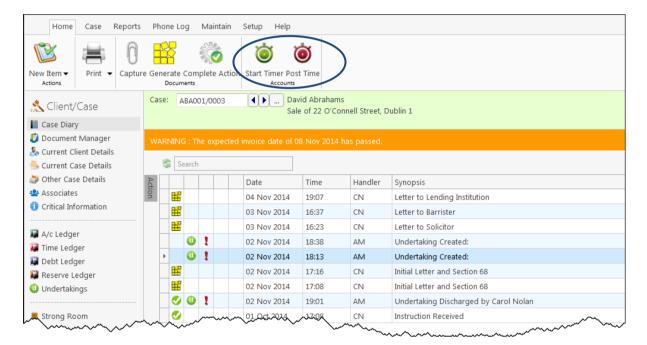
ost Time



The Timer

Manual time slips

Both tools can be found on the Home tab.



How to Record Time Using the Timer

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

- 1. Open a Case in the Case Diary
- 2. Click **Start Timer** on the Home tab. A timer will appear displaying the current case reference.
- 3. The clock will automatically start recording.
- To pause the timer click on the clock at the left of the timer. The clock will stop and an orange symbol will appea next to it.

•	ABA001/0003	00:00:36	⊻ 🛓	+ 🔍	×

r	° 🕒	ABA001/0003	00:01:49
•			

- 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.
- CUL001/0001 🕂 🔍 🗙 00:24:58 7. To expand the timer Matter Code Time Client Name Matter Details Comment Date click on Maximise. CUL001/0001 ۲ 00:24 Ann Marie... Ann Marie Cullen Credit Ca. 23 O... ABA001/0003 ۲ 00:04 David Abra... David Abrahams Sale of 22. 11 N., David Abrahams Sale of 33 ... 💐 ABA001/0004 00:02 David Abra... 11 N., Laragh Drive
- 8. To recommence a time recording for an entry already listed in your timer click on entry already listed in y
 - 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.
- ABA001/0003 00:04:35 🗹 🍝 🕂 🔍 9. You can amend the Matter Code Time Client Name Matter Details Comment Date CUL001/0001 Ċ, 00:33 Ann Marie. 23 O. Ann Marie Cullen Credit Ca. details and post this ABA001/0003 ۲ 00:04 David Abra... David Abrahams Sale of 22. 11 N... time now or later. David Abrahams Sale of 33 Ö, ABA001/0004 11 N... 00:02 David Abra... Laragh Drive
- 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.

CUL001/0001					00:24:58		🖌 🛓 🛉 🗟 🗙		
	Matter Code			Time	Client Name	Matter Details	Comment	Date	
Þ	CUL001/0001		(00:24	Ann Marie	Ann Marie Cullen Credit Ca		23 O	^
	ABA001/0003		(00:04	David Abra	David Abrahams Sale of 22		11 N	
	ABA001/0004		(00:02	David Abra	David Abrahams Sale of 33 Laragh Drive		11 N	

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

Matter:	The code of the	Post Time X
	current case is	CUL001/0001 Ann Marie Collen Select Matter
	automatically	Ann Marie Cullen Select Matter Gredit Card Debit Administration Time
	displayed. Click the	Time Recorder Carol Nolan V Select
	Matter button to bring	Date 23 Oct 2014 w Time ● Minutes 33.00 ○ Units 5.50 ○ ○ Hours 0.55 ○ ○ Days 0.07 ○ □
	matter list and select a	Time/Charge Time C Charge
	different case if	Hours Rate Charge
	required.	Task Select a task
Date:	By default, the date	the
	time was recorded will	⇒ Save Save and Post Cancel be

shown. Change if required.

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

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

- Hourly Rate: The hourly rate will display the **default rate** for this handler and case.
- **Chargeable:** Check the box if this time is chargeable or uncheck it if it is not. By default, the box will be checked.
- Task: Use the drop-down arrow to select from a list of tasks.
- **Comment** Input a narrative to describe the time entry
- 4. Click on **Save** to save the changes **or** click on **Save and Post** to remove the entry from the timer and post to the daybook.

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

How to Record and Post Admin Time Using the Timer

Keyhouse

🗹 🕹 🕂 🔍 🗙

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. ABA001/0003 00:00:36

.

- 3. The clock will automatically start recording.
- 4. xpand the timer by clicking on Maximise.
- 5. **Double click** the entry to amend, the following screen will appear.
- 6. Put the **tick** in the Administration Time tick box. The screen will change displaying the following option:

Non – Chargeable Codes:

Select a nonchargeable code from drop-down list; e.g. Training, Illness, Holidays etc.

	Post Time X	
	_	
Administration Time Non Chargeable Cod	e Practice Development	
Time Recorder	Carol Nolan	
Date	23 Oct 2014 v	
Time	Minutes 35.00 ♥ ○ Units 5.83 ♥ ○ Hours 0.58 ♥ ○ Days 0.08 ♥	th
Training time		

00:01:49

ABA001/0003

- 5. **Save** the changes.
- 6. The timer will automatically restart.
- 7. 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

8. Click on Save and Post. This time entry is then transferred to the daybook ready for posting to time ledger.

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

How to create an Empty Timer

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

1.	Click on the Start timer tool on the Home tab. current case will automatically be selected. $(ABA001/0003 00:00:36) \lor \downarrow + (ABA001/0003 00:00:36) \lor + (ABA001/00:36) \lor + (A$	The
2.	Click on the Green Plus to add an empty timer.	
3.	Click on clock to start the timer 🖉 🔐 🕺 🕺 🕺 🕺 🕺 🕺 🕺 🕺	
4.	To amend the entry, expand the timer by clicking on Maximise.	

5. **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. 89 above), but without a matter code.

<u>م</u>		Post Time	x
Click here to sele	ect matter		Select Matter
Administration Time			
Time Recorder	Carol Nolan	▼	

6. Input/Amend the following details as required:

Matter:	No case code will be displayed. Click the Select Matter button to bring up the matter list and select the case to which the time is to be posted.
Date:	By default, the date of the time recording will be shown. Amend if required.
Minutes/Hours/Days:	This will reflect the timings recorded but can be amended if required
Time/Charge	Use the option buttons to select whether this entry should be charged on the basis of time spent or as a set charge.
Hourly Rate:	The hourly rate will display the default rate for this handler and case.
Chargeable:	Check the box if this time is chargeable or uncheck it if it is not. By default, the box will be checked.
Task:	Use the drop-down arrow to select from a list of tasks.
Comment	Input a narrative to describe the time entry

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

How to create a manual time slip

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

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

		Post T	ime	×
ABB001/0007 George J Abbott Sale of 1 Main Street, I	Howth, Co. Dublin			Select Matter
Administration Time				
Time Recorder	Carol Nolan	¥		
Date	12 Nov 2014	~		
Time	Minutes	1.00 🗘 🔿 Units	0.17 🖕 🔿 Hours	0.02 🗘 🔿 Days 🛛 0 🗘
Time/Charge	● Time ○ Charge			
	Hours	Rate	Charge	☑ Is Chargeable
Task	Select a task	~		
				Save Save and Post Cancel

3. Input or Amend the following details

Matter:	The case code will default to the current matter; to change the case, use the select matter button to view the matter list and double-click the required case to select it.
Date:	This will default to the date the timing was recorded. Amend if required.
Minutes/Hours/Days:	Input the amount minutes, hours, days etc.
Time/Charge	Using the option buttons provided set if the time recording is be charged by time or a set charge.
Hourly Rate:	The hourly rate will display the default rate for this handler and case.
Chargeable:	Using the tick box provided tick if the time is chargeable or remove if it is not. This will default to chargeable.
Task:	Click on the drop down arrow to reveal a list of tasks. Click the task required.
Comment	Input a narrative to describe the time entry

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

How create an Admin Time slip

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

	Post Time	x
Administration Time		
Non Chargeable Code	Select non chargeable code	
Time Recorder	Carol Nolan	
Date	11 Nov 2014	
Time	Minutes 11.00 O Units 1.83 O Hours 0.18 O Days 0.02	2
Attendance with Client	t	
	I	
	Save Save and Post Canc	el

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 Post**. 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 All** on the timer tool bar.
- 3. The Day book will appear.

0		Keyhouse Case N	fanagement (CN - Carol Nolan)	🔍 Quick Se	arch) - • :
Home Case Repo	rts Phone Log Mai	intain Setup Help				
	int Timer Post Day Book					
Time Costing	Day Book Summary	у				
My Day Book	Chargeable Time	00:03	Non Chargeable Time 00:11	Handler C	arol Nolan	~
My WIP by Bill Date	Date N	Matter Code Client Na	Matter Details	Comment	Case Time	Charge
My Top WIP	▶ 23 Oct 2014 A	Admin Time			00:49	0.00
Dashboard	11 Nov 2014 A	ABA001/0003 David Ab		Attendance with	00:11	27.00
	11 Nov 2014 A	ABA001/0004 David Ab	David Abrahams Sale of 33 Laragh Drive		00:02	
	12 Nov 2014			L.	00:01	
Tasks						
Tasks Search/Open	_					
	_					

My Day Book

Viewing the Day Book

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

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

How create a Time slip in the Day Book

- 1. Click on **New Time Slip** on Home Tab in **My Day Book**. The familiar Post Time dialogue box (see How to create a manual time slip, p. 91 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. 91 above.
- 3. When all details have been entered click **Save**. The time slip will appear in the Daybook ready for posting.

How to create an Admin Time slip in the Day Book

- 1. Click on New Time Slip on the Home tab in My Day Book. The Post Time dialogue box will appear.
- 2. Check the Administration Time box. The screen will change to display the options for Administration time (see How create an Admin Time slip, p. 93 above).
- 3. Complete the details of Date, Time, Non-Chargeable Code and Comment as above, How create an Admin Time slip, p. 93.
- 4. Click on Save and Post. This time entry is then added to the daybook ready for posting to time ledger.

How to amend a Time Slip

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

How to Delete a Time Slip

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

How to Post the Day Book

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

Accessing the Time Ledger Screen

Viewing the time Ledger

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

¢,	Add
٩	Edit
Ö,	Delete
٢	Start Timer

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

 $\overset{\circledast}{=}$ 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.
 - \blacksquare **Note**: The current balances on the matter are displayed on the right of the screen.

	Draft Invoice	□ ×
Ok Message:		
Cancel	edit Note 💿 Invoice 🔲 Open Invoice 🔲 Bill Sent	Invoice / Bill No: (not invoiced)
Matter Details		
Matter	GLE001/0001 Charlie Gleeson	Bills: 0.00
Description	Lease of South West Georges Street	Outlay: 5.60
Date	15 Nov 2014 Transfer To Pay	Client: -45.00
Bill To	chance of ceson	Charges: 925.00
Client Copy	South West Georges Street Dublin 2	Time (HH:MM): 3:42
Our Ref	JP Your Ref:	
Write down Time to	15 Nov 2014	
Invoice Details Fe	Earner Breakdown	
Type Narrative	Net VAT Va	lue Fee Earner
Release		^
Notify Release Inv		
	Right-Click for Options	5
Billing Guide		
Matter Ledger Fees: 0.00 Outlay:	0.00 Miscellaneous Fees: 0.00 VAT: 0.00	Bill Total: 0.00
Requested By: Carol Nolan Draft Number: (new)		

Message Input a message for the account department (optional)

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

revert to the client details.

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

Your Ref Input a reference if applicable.

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

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



Billing Guide Wizard	Ma	tter:	GLE0	01/00	01 - 1	Charli	e Gleesoi	n/Lease	of Sc				es Stre	et
	Time							Outla	av.	Di	raft No	0: 26	5	
	4		Nov	ember 2	014		•	4	-,	Nov	ember	2014		F.
	M	т	W	T	F	S	s	M	Т	W	T	F	S	s
	27					1	2	27					1	2
	3	4	5	6	7	8	9	3	4	5	6	7	8	9
	10	11	12	13	14	15	16	10	11	12	13	14	15	16
	17	18	19	20	21	22	23	17	18	19	20	21	22	23
	24	25	26	27	28	29	30	24	25	26	27	28	29	30
	1			4			7	1			4			
	_			today	_		_	12-11		_	today			
	OR A	mount					0.00	OR A	moun	t				0.0
	Time R	ef Grou	ping					Outlay	Group	ing				
	1	ngle Lir		ees							Dutlays			
		roup by									ау Туре			
		o group							o grou		9.995			
	C. Pa	o Broat	DUIR					O M	o Broul	huiß				
	No.	Time	/ Fees					No.	o Outla	У				
an worth a sea						L,	3	Regen	ierate	Billing	Guide :	>>	<u>N</u> ext	>>

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

Draft No: 265

nding

600.00 600.00

95.00 95.00

42.50 42.50

187.50 187.50

- 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.

Туре

* Matter

GLE001/0001

GLE001/0001

GLE001/0001

GLE001/0001

BS

pc

Billing Guide (n.)

ttems Action Bill in Full

🖺 Bill in Full

Bill in Full

🖺 Bill in Full

Time to: Saturday 15 November 2014

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 t Bill Now column an change the amoun
- 💾 Bill in Full GLE001/0001 Pd Registered Post - letter to L 5.60 2 Total Outlay 5.60 Grand Total: 930.60 ing options. Right-click on the list for Ok

ber 2014

* Description

Attendance on client

Letter to Noel Common SC

Letter to client re instructions and se

File Review re counsels fees and our fu

	Billing Guide W	izard			
the			Group: Attendanc	Matter: GLE001/0001 - Charlie Glee	son/Lease of South West Georges Street
nd	Items			4	¢
nt.	Action Type Bill Partially F	GLE001/0001	[°] Handler [°] Outla BS	Description Attendance on client	Outstanding BillNow

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

_	
5	Ungroup All Items Ungroup <u>S</u> elected Items
	Group all Fees and Outlays Group all <u>F</u> ees Group Fees by Fee <u>F</u> arner Group all <u>O</u> utlay Group Outlay by Outlay <u>T</u> ype
	Group selected Narrative(s) Group selected Matter(s)
	Group Selected Items
	Bill Selected Items Bill All Items Do not bill Selected Items Do not bill Any Items Exclude Selected Items from all Bills Exclude All Items from all Bills

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							
¢	[‡] Ac	tion	🕈 Туре	* Matter	[‡] Handler [‡] C	Dutlay [©] Description	[‡] Outstanding	[‡] BillNow
	Bill r	Bill in Full	-	^LE001/0001	BS	Total Fees	925.00	625.00
E	Bill i	Don't Bill		LE001/0001	JP	Pd Registered Post -	letter to Landlord 5.60	5.60
		Exclude fror	n 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.

	ick					
				Matter: GLE001/0001 - Charlie Gleeson/Lease o	f South West Geor	ges Street
			g Group: Total 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	n 95.00	95.00
Bill in Full	F	GLE001/0001	BS	Letter to Noel Common SC	187.50	187.50
Bill Partially	F	GLE001/0001	BS	Attendance on client	600.00	300.00

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

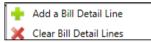
OR

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

					Draft Invoice						□ ×
V Ok	Message:										
Cancel	Request Type:	0]	Invoice	🔲 Open	Invoice	Bill Sent		I	nvoic	e / Bill No: (not in	nvoiced)
Cancel	– Matter Detail	ls —									
		Matter:	GLE001/0	001	C	harlie Glees	on			Bills:	0.00
	Desc	ription:	Lease of S	South Wes	t Georges Stre	et				Outlay:	5.60
		Date:	15 Nov 20	014	× 🗆	Transfer To	Pav			Client:	-45.00
		Bill To:	Charlie Gl	leeson						Charges:	925.00
		Client	enance en		s Street Dublir	2				Time (HH:MM):	3:42
Print Copy	(Our Ref:	JP		Yo	ur Ref:					
	Write down 1	Fime to:	15 Nov 20	014	~						
	Invoice Detai	ls Fee I	Earner Brea	akdown							
	Type N	arrative				Net		VAT Value	Fee B	arner	
	► F A	ttendano	e on client				600.00	138.00	Brian	Sweeney	^
Release	F Le	etter to cl	lient re inst	tructions a	nd section 6		95.00	21.85	Brian	Sweeney	
	F Fi	ile Review	/ re counse	els fees an	d our fees		42.50	9.78	Brian	Sweeney	_
🔲 Notify Release Inv	F Le	etter to N	loel Comm	on SC			187.50	43.13	Brian	Sweeney	
	O P	d Registe	red Post -	letter to L	andlord		5.60	0.00	Justi	n Phelan	
Billing Guide						1	de la				<i>.</i>
Matter Ledger	Fees: 925.00	Outlay:	5.60 Mis	cellaneou	s Fees: 0.00 \	/AT: 212.76	5			Bill Total: 1	143.36
Requested By: Carol Nol	an Draft Number:	268									.41

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.

	Add or edit Bill Detail Line
Charlie Glee	son
Dispute with	Dunnes Stores
Fees	🛛 Outlays 🔊 Miscellaneous Outlays
Fee Earner:	Carol Nolan
Nominal:	Fees Issued - Carol Nolan
Narrative:	Add narrative
Net:	0.00 VAT Code: U 💙 VAT Value: 0.00
	Ok Cancel
Line No: (ne	w) 🔶 🔒

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

I	nvoice Details	Fee Earne	r Breakdown				
	Fee Earner		Percentage	Value	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.
- 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 Fee Earner Breakdov	'n	×	
Edit Breakdown by:	O Percentages O Values			
Fee Earner		Percentage	Value	
Brian Sweeney		39.07285	885.00	
Carol Nolan		19.84547	449.50	
Stephen Keogh		41.08168	930.50	
	Ok Cancel)		
	Ok Cancel]		

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

15 Nov 2014 14:03 CN Draft Bill Draft Bill No: 268	15 Nov 2014	14:03	CN	Draft Bill Draft Bill No: 268	
--	-------------	-------	----	-------------------------------	--

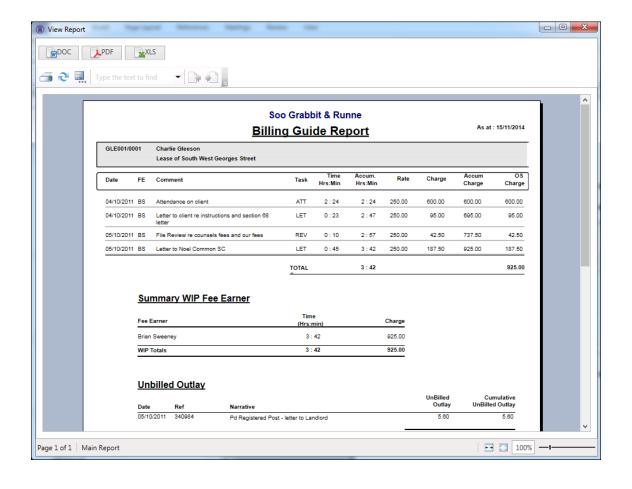
7. To view the draft invoice, double-click the entry and amend as required. Then click **Release** as in 5 above to send to accounts for approval.

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

	Enter Parameters
To Date	15 Nov 2014
Matter code	GLE001/0001

- Enter the matter code. The current case will be shown by default
- 4. Click **Run.** The report will be generated showing the Billing Guide.





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

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

The Time Report

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

🚫 Time Costing	Day Book Summary	
My Day Book	Time Ledger for	Fe between dates
Time Report	Enter Pa	rameters
My Top WIP	Please Enter the Handler Code	BS
🭠 Dashboard	Fromdate	02 Jan 2015 15
	To Date	09 Jan 2015 15
	Chargable	All
		Run
Tasks		
Search/Open		
Client/Case		
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.

View Report	¥XLS		
🗃 🎅 🛄 Type the text	-		
	ີ⊳ <u>Time Entry For FE</u>	Between Dates Report	Dats Date: 12/11/2014.21:1 From Date: 05/11/ To Date: 12/11/2
Matter Time Entry D	Client Matter Description	Hrs:min Rate Charge Task	Comment
	Daily Recorded Mins Chargeable (Hrs) Non-Chargable (Hrs)	Lue Admin (Hrs): Unassigned (Hrs): Write Offs (Hrs):	*NerChi
	Total Recorded Mins Chargeable (Hrs): Non-Chargable (Hrs)	lue Admin (Hrs): Unassigned (Hrs): Write Offs (Hrs):	
	Keyhouse Lege	1/1 Specialists www.ksythosea.g	Page Fort V
Page 1 of 1 Main Report			► [100%] —I

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

oc	PDF	XLS					
2 🗐	Type the text	t to find	- 0+ +0	5			
					Soo Grabbit & Runne		
				WIP for Fee E	arner by Last Bill Date	Data Da	ate : 12/11/2014:21:14
	Started	Last Bill Date	Matter	Client Name	Description	Client A/C	WI
CN		Carol N	olan				
	08/05/2004		ABB001/0001	George J Abbott	Sale 45 Somserset Road. Dublin 6	(345,000.00)	437.50
	31/01/2012			Abbey & Procter	Share Holding Agreement	0.00	300.00
	02/12/2005			Business Time Limited	Lease of Unit 33, Eastgate Avenue, Dublin 12.	0.00	161.20
	24/05/2011			Finance Department	Damages - 21 Main Street	0.00	3.00
	11/12/2013		KEL002/0001		Purchase of Property	0.00	4.50
	02/05/2012			Lowery Developments	Receivership - Nama Properties - No 3 Sandyford Estate	(925.00)	500.00
	01/01/2010		QUI002/0001	Niall Quinn	Accident at work	(2,000.00)	300.00
	23/09/2010		SHA001/0003	John Shaw	Jones Trust	0.00	49.50
2009							
April			011100410005				
	03/06/2010	20/04/2009	QUI001/0005	Alan Quinn	Sale of 12 Main Street, Bray, Co. Wicklow	0.00	600.00
May	14/01/2011	30/05/2009	FIT001/0001	Scott Fitzpatrick	Estate of Joan Fitzpatrick	(480.75)	3.00
						Chargeable WIP Non-Chargeable WIP	2,358.7
						Report WIP Totals :	2,358.7 * Non-Chargeable Tim

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

My Top WIP

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

Type the	e text to find	-				
			Soo Gra	bbit & Runne		
		<u>Top V</u>	<u>Vork In Progre</u>	ess By Fee Earner	Data Date : 12/11 F	/2014:21:21 ee Earner : CN
Start Date	Last Bill Date	Matter	Client Name		Client A/c	WIP **
CN	Carol No					,
03/06/201	0 20/04/200	9 QUI001/0005	Alan Quinn	Sale of 12 Main Street, Bray, Co. Wicklow	0.00	600.00
02/05/201	-	LOW001/0003	Lowery Developments	Receivership - Nama Properties - No 3 Sandyford Estate	(925.00)	500.00
08/05/200		ABB001/0001	George J Abbott	Sale 45 Somserset Road, Dublin 6	(345,000.00)	437.50
31/01/201		ABB002/0002	Abbey & Procter	Share Holding Agreement	0.00	300.00
01/01/201		QUI002/0001	Niall Quinn	Accident at work	(2,000.00)	300.00
02/12/200	5	BE\$001/0001	Business Time Limited	Lease of Unit 33, Eastgate Avenue, Dublin 12.	0.00	161.20
23/09/201	0	SHA001/0003	John Shaw	Jones Trust	0.00	49.50
11/12/201	3	KEL002/0001	Sarah Kelly	Purchase of Property	0.00	4.50
24/05/201	1	FIN001/0002	Finance Department	Damages - 21 Main Street	0.00	3.00
14/01/201	1 30/05/200	9 FIT001/0001	Scott Fitzpatrick	Estate of Joan Fitzpatrick	(480.75)	3.00
				Report Total		2.358.70

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

KPI Reports

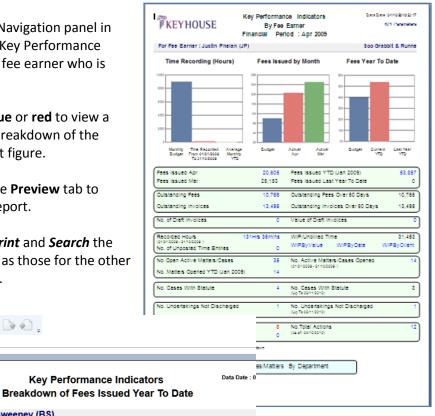
- Click Dashboard on the Navigation panel in *Time Costing* to see the Key Performance Indicators report for the fee earner who is logged in.
- 2. Click on the figures in **blue** or **red** to view a subreport containing a breakdown of the details that make up that figure.
- 3. In the subreport, click the **Preview** tab to return to the main KPI report.

Type the text to find

FeesYTD X

Preview

4. The options to *Export, Print* and *Search* the KPI Report are the same as those for the other reports described above.





Chapter 11: Accounts

Account Functions in the Case Diary

View the Matter Ledger

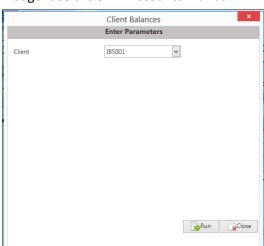
- 1. **Open** a case in the Case Diary.
- 2. Click on A/C Ledger on the Case Diary Navigation panel.
- 3. The following screen will appear.

Hon	ne Case Reports	F	Phone Log Maintain Setup	Help	·		<u> </u>
	📄 Draft Invoice 📼 Request Cheque			2			
Print	Accounts	Со	mment Set Client Reserve Clien A/c Ledge		edger		
<u> </u> Clier	nt/Case	C	ase: IBS001/0019	International Bu -v- Fitzsimmons	siness Services Ltd Property Management plc		
📕 Case D	iary						
🚺 Docum	ent Manager						
a Current	Client Details	16	Search				
	Case Details		Date ⁹	Ref	Narrative	Billing A/c	Outlay A/c
	Case Details		Jan Barris				
🖀 Associa	ites		30 Jun 2011	pc	Pd Registered Post		5.50
Critical	Information		03 Jul 2011	5012368	Pd Brady & Co Search Fees		57.50
			12 Jul 2011	pc	Pd Commissioner for Oaths swearing affidavit of debt		40.00
📓 A/c Leo	lger						
📓 Time Le	edger						
📓 Debt Le	edger						
🙀 Reserve	e Ledger						
🕛 Undert	akings						
Strong	Room		m m				
	minun	~~				~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

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.

OC PDF XLS	5				
(Last Posting: 06/09/2012)		er List			
HAL002 Hire Banking Ltd	0511 45	Billing A/c	Outlay A/c	Client Cur.	Client Dep.
0000 0000 Matter 0001 Debt Recovery - Jack Johnston	GEN AD		0.00	0.00	0.00
0002 Debt Recovery - Mary Ascond	DEB MV		0.00	0.00	0.00
Total Matters: 3 * = Billed	Total Balances	: 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	h
		J

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

How to add a comment

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

	Add Co	mment X
Date	15 Nov 2014	~
Paying in	Part Payments	
		Ok Cancel

How to Create a Cheque Request

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

(iii)		Cheque Request			×
Bank:	Client Current Bank	A/c	~	Date: 15 Nov 2014	4 🗸
Payee:	Brady & Co		~	Value:	100.00
Fee Earner:	Carol Nolan		~	🗷 Third Part	у
Narrative:	Pd Brady & Co				~
Notes:	Searches				
Matter Details —					
Matter:	IBS001/0019	◀ ▶ International Busine			
	(Client A/c)	-v- Fitzsimmons Pro Outlay Code:	· · · ·		
	(cucin Aye)	outdy couc.	Jearch	1000	~
	(cacin Ayt)	Outlay A/c:	Search		✓ 103.00
	(cuch Aye)				
Ledger Narrative:		Outlay A/c:			103.00
Ledger Narrative:		Outlay A/c:		Notify Release	103.00 0.00

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

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

Client

How to Create a Draft Invoice

- 8. **Open** a case in the Case Diary.
- 9. 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)
Туре	Invoice will be checked by default; select Credit Note if required.

	Draft Invoice	□ ×
V Ok	Message:	
Cancel	Request Type: O Credit Note Invoice Open Invoice Bill Sent	Invoice / Bill No: (not invoiced)
	Matter Details Matter: GLE001/0001 Charlie Gleeson	Bills: 0.00
	Description: Lease of South West Georges Street	Outlay: 5.60
	Date: 15 Nov 2014 🗸 🖂 Transfer To Pay	Client: -45.00
Print Copy	Bill To: Client Client Dublin 2	Charges: 925.00 Time (HH:MM): 3:42
	Our Ref: JP Your Ref:	
	Write down Time to: 15 Nov 2014	
	Invoice Details Fee Earner Breakdown	
	Type Narrative Net VAT Value	Fee Earner
Release		^
	Right-Click for Options	
Billing Guide		×
-	Fees: 0.00 Outlay: 0.00 Miscellaneous Fees: 0.00 VAT: 0.00 Ian Draft Number: (new) Image: New York Image: NewYork <td>Bill Total: 0.00</td>	Bill Total: 0.00
Requested By: Carol Not	nan brait Nomber: (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 button to bring up a matter list and double-click the required case.
- Description This will default to the matter description to amend click in the input box provided and amend.

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

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

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

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

Your Ref Input a reference if applicable.

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

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

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

2.

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.

Home Case Repo	rts Phone Log Maintain Set	up Help					
Add Edit Delete A/c Led Bil Reguisitions	lger						
Search/Open	Carol Nolan	~					
🞳 All Matters	Search						Draft Invoices
le 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	265
💐 Advanced Search	GOR001/0001	15 Nov 2014	Noreen Gorman	22 North Circular Road Dublin 2	I	178.67	266
🜔 My Invoices	GRE002/0002	15 Nov 2014	Roger Greene	33 Main Street Cork	I	774.90	267
My Cheques	GLE001/0001	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	1,143.36	268
😚 Phone Log	GLE001/0002	15 Nov 2014	Charlie Gleeson	South West Georges Street Dublin 2	I	4,981.50	269
Strong Room	BLA001/0001	29 Oct 2014	Gordon T. Black	23 Ellis Park, Rathmines, Dublin 6.	I	0.00	264
🗟 Document Search 🗊 Template Library			6				

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. 110 above.

How to Edit a Draft Invoice

- 1. Go to My Invoices as described above.
- Either select the invoice to be edited and click the Edit icon on the Home tab or doubleclick 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.

]												
\checkmark	Ok	М	essage:										
	Cancel	Re	equest Typ	pe: O	Invoice	🔲 Open Invoice		Bill Sent		I	Invoid	e / Bill No: (not i	invoiced
	Print Copy	- 1	Matter De D	tails Matter: escription: Date: Bill To: Client	15 Nov Charlie	f South West George 2014	s Stre	Transfer To				Bills: Outlay: Client: Charges: Time (HH:MM):	-45.00 925.00
-	Ринссору		Write dow	Our Ref: In Time to: Itails Fee	JP 15 Nov Earner Br		¥0	our Ref:					
			Туре	Narrative				Net		VAT Value	Fee	Earner	
		Þ	F	Attendand					600.00			n Sweeney	
J	Release		F			structions and section			95.00			n Sweeney	
			F			sels fees and our fee	s		42.50			n Sweeney	
Notif	y Release Inv		F	Letter to N					187.50			n Sweeney	
			0	Pd Registe	ered Post	 letter to Landlord 			5.60	0.00	Just	in Phelan	
6	Billing Guide												
	/latter Ledger												

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		Oragine 12 No. or Adventional Vol.	Comparison, No. 40	Manual Red.	
DOC PI	DF XLS				
🗇 ਦ 🛄 Тур	e 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 to VAT €	Liable to VAT €	
	Attendance on client			600.00	
	Letter to client re instructions and section 68 letter			95.00	
	File Review re counsels fees and our fees			42.50	
	Letter to Noel Common SC			187.50	
	Pd Registered Post - letter to Landlord		5.60		
					5
	E&OE	SUBTOTALS	5.60	925.00	
		5.00 @ 23.00 % VAT	5.00		
	92	.5.00 @ 25.00 % VAI		212.76	
	Add tot	al not subject to VAT		5.60	
		INVOICE TOTAL:		1,143.36	

	Ok	
×	Cancel	
書	Print Copy	
L	Release	
🗌 No	tify Release Inv	
	Billing Guide	
	Matter Ledger	
		_

My Cheques

Viewing 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 Reports	Phone Log Maintain	Setup Help				(
Add Edit Delete A/c Ledger Cheque Requisitions							
Search/Open	Carol Nolan	v					
🗃 All Matters	Search						Standard View
🐉 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							

How to Create a Cheque Request

- 1. View My Cheques as described above.
- 2. Click **Add** on the Home tab.

3.	Input the fo	llowing information:			Cheque Request				×
			Bank:	Client Current Bank A/c		~	Date:	15 Nov 2014	~
	Bank	Select from the drop-	Payee:	Brady & Co		~	Value:		100.00
		down list.	Fee Earner:	Carol Nolan		*		Third Party	
			Narrative:	Pd Brady & Co					*
	Date	Today's date will be	Notes:	Searches					
	Date	•	– Matter Details —						
		shown by default;	Matter:	IBS001/0019	International Busines	s Service	es Ltd		
		change as required.			-v- Fitzsimmons Prop	<u> </u>		nt plc	
				(Client A/c)	Outlay Code:	Search	Fees		~
	Payee	Input the Payee's			Outlay A/c:				103.00
	layee				Client Current A/c:				0.00
		name or select a	Ledger Narrative:	Pd Brady & Co					K
		supplier from the			Ok Cancel			lotify Release	Release
		drop-down list.	Requested By: Carol N	lolan Req. No: (new)					

- Value **Input** the amount of the cheque.
- Fee Earner This will default to the current fee earner. Select a different fee earner from the drop-down list if required.
- Third Party Check the box if this is a third party cheque.
- Narrative **Input** a cheque narrative or click on the down arrow to pick from a list of narratives.
- Notes **Input** a note to the Accounts Department if required.

- Matter This will show the current case. To select a different case, click on the browse button for the matter list and **double-click** the required case.
 Notify Check this box if you want an email to be sent to the Accounts Department when the cheque has been released.
 Ledger By default to the cheque narrative will be shown but it can be amended either 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 Create a Draft Invoice

- 1. View **My Cheques** as described above.
- 2. Click **Draft Invoice** on the Home tab.
- 3. A draft Invoice will appear.
- 4. Complete as previously described in How to Create a Draft Invoice, p. 110 above.

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.



Search						
Date ,	Ref	Narrative	Billing A/c	Outlay A/c	Client	Deposit A
15 Mar 2010	2266	Pd PIAB		50.00		
30 Mar 2010	рс	Pd Swearing fees		24.00		
24 Apr 2010	2390	Pd Dr Simon Young Medical Report		250.00		
30 Apr 2010	pc	Pd Commissioner for Oaths		55.00		
30 May 2010	1739	Lodged settlement agreed			(13,750.00)	
10 Jun 2010	1654	Lodged on a/c fees & vat			(1,210.00)	
19 Jun 2010	5887	Pd Mr Gordon T Black settlement less fees			12,548.00	
30 Jul 2010	500178	Pd Gordon T Black balance due to client			375.30	
12 May 2011	218	To Invoice 218		(50.00)		
12 May 2011	218	To Invoice 218		(24.00)		
12 May 2011	218	To Invoice 218		(250.00)		
12 May 2011	218	To Invoice 218		(55.00)		
12 May 2011	218	Invoice: Fees:635 Outlay:379 VAT:133.35	1,147.35			
12 May 2011	pc	Stephen Keogh Senior Counsel Fees		3,230.00		

Chapter 12: The Debt Ledger

How to View the Debt Ledger

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

How to add the original debt

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

Home Case Reports	Phone Log Mai	ntain Setup	Help												
Print															
Client/Case	Case: IBS001/000	1	International Busine		:d										Tel: 01-6677889
Case Diary			Debt - Gregg Quin	lan											F/e: BS
Document Manager	Document Manager Original Debt Amount 1.000.00 Total Collected to-date 400.00							Post Payment							
🌭 Current Case Details	urrent Case Details Interest to-date 0.00 Post Interest														
Other Case Details Associates	Is Recoverable Cost to-date 0.00 Post Costs Outstanding 60						600.0	0							
 Critical Information 	Matter Code	Date	Description	Method	Туре	Payment	Principal Paid	Interest Paid	Cost Paid	Interest Due	Cost Due	Remitte d	Held Date	Posting Ref	Reference
📓 A/c Ledger	▶ IBS001/0001	31 Oct 2007		Cheque	Receipt	100.00							14 Nov 2007	12	
Time Ledger	IBS001/0001	14 Oct 2009		Cheque	Receipt	100.00							28 Oct 2009		test
Debt Ledger	IBS001/0001	14 Oct 2009		Cheque	Receipt	200.00	200.00						28 Oct 2009	21	tes
🙀 Reserve Ledger															
Undertakings															
Strong Room			~				~~-		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~.	~~~~~	~~~			
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~		- man	~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	$\sim$			· ~~	~~~~~	my	

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

confirm.

 $\checkmark$ 

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

### How to Post a Payment

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

Original Debt Amount	8,317.00		Total Collected to-date	0.00	Post Payment
Interest to-date	28.71	Post Interest			
Recoverable Cost to-date	0.00	Post Costs	Outstanding	8,345.71	

	Post	payment		
Payment Proper	ties			
Matter Code	IBS001/0001			
Date	15 Nov 2014	•		
Reference	1425			
Type	Direct Payment	•		
Payment Method	Cheque	•		
Value	305.00			
Principal Paid	250.00	Principal Status	Part Payment	~
Costs Paid	50.00	Costs Status	Part Payment	~
Interest Paid	5.00	Interest Status	Part Payment	~
Description Paid	3 of 5 payments			
			Save	Cance

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

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

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

### How to Post Costs

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

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

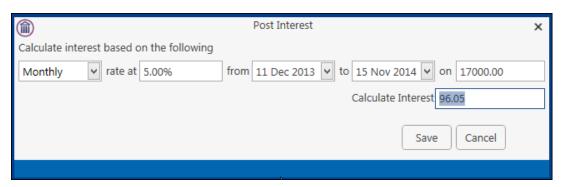
3. Input the following information on the Post Costs dialogue box

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

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

### **How to Post Interest**

1. Click on Post Interest.



- 2. Input the following information on the **Post Interest** dialogue box:
  - Term Select Monthly, Yearly etc. from the drop-down list.
  - Rate at Input the rate of interest

From **Input** the start date or click the down arrow to select from the calendar.

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

### How to Amend a Entry

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

### How to Print a Debt Ledger Report

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

	Debt Costing Ledger	×
	Enter Parameters	
Matter	IBS001/0001	
		Run

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

Debt Costing Ledger           Matter         IBS001/0001         Debt - Gregg Quinlan           Original Debt         17,000.00         Debt Interest         157.76           Recoverable Costs         600.00         Collected to Date         705.00           Outstanding         17,052.76           Date         Method         Type         Value         Premium Paid         Costs         Costs Paid         Interest         Interest Paid           31/10/2007         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         100.00         0.00         0.00         0.00         0.00           15/11/2014         Interest         0.00         0.00         0.00         61.71         0.00           15/11/2014         Interest         0.00         0.00         0.00         6.00         0.00           15/11/2014         Costs         0.00         0.00         0.00         0.00         0.00         0.00           15/11/2014         Interest         0.00         0.00         50.00         0.00         0.00         0.00         0.00           15/11/2014         Costs	<b>e</b> 📃	Type the text to fi	nd 👻								
Matter         IB S001/0001         Debt - Gregg Quinlan           Original Debt         17,000.00         Debt Interest         157.76           Recoverable Costs         600.00         Collected to Date         705.00           Outstanding         17,052.76           Date         Method         Type         Value         Premium Paid         Costs         Costs Paid         Interest         Interest Paid           31/10/2007         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00           15/11/2014         Interest         0.00         0.00         0.00         61.71         0.00           15/11/2014         Interest         0.00         0.00         0.00         50.00         0.00           15/11/2014         Interest         0.00         0.00         50.00         0.00         50.00           15/11/2014         Costs         0.00         0.00         50.00         0.00         50.00           15/11/2014         Interest         0.00         0.00         50.00         0.00         50.00 <td< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></td<>											
Date         Method         Type         Value         Premium Paid         Costs         Costs Paid         Interest         157.76           Date         Method         Type         Value         Premium Paid         Costs         Costs Paid         Interest         Interest Paid           31/10/2007         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00         0.00           15/11/2014         Interest         0.00         0.00         0.00         0.00         61.71         0.00           15/11/2014         Interest         0.00         0.00         0.00         50.00         50.00           15/11/2014         Costs         0.00         0.00         0.00         0.00         50.00         50.00         0.00         50.00           15/11/2014         Costs         0.00         0.00         50.00         0.00         50.00         50.00         50.00         50.00         50.00         50.00         50.00         50.00         50.00         50.00         50.00         50.00         50.00					Debt (	Costing Le	edger				
Recoverable Costs         600.0         Collected to Date         705.00           Date         Method         Type         Value         Premium Paid         Costs         Costs Paid         Interest         Interest Paid           31/10/2007         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         200.00         200.00         0.00         0.00         0.00           15/11/2014         Interest         0.00         0.00         0.00         61.71         0.00           15/11/2014         Interest         0.00         0.00         0.00         50.00         50.00           15/11/2014         Interest         0.00         0.00         50.00         0.00         50.00           15/11/2014         Interest         0.00         0.00         0.00         50.00         0.00         50.00           15/11/2014         Interest         0.00         0.00         50.00         0.00         50.00         0.00         50.00           15/11/2014		Matter			IB\$001/00	001 Debt - G	egg Quin	lan			
Date         Method         Type         Value         Premium Paid         Costs         Costs Paid         Interest         Interest Paid           31/10/2007         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         200.00         200.00         0.00         0.00         0.00         0.00           15/11/2014         Interest         0.00         0.00         0.00         0.00         50.00         50.00           15/11/2014         Interest         0.00         250.00         0.00         50.00         50.00           15/11/2014         Cheque         Direct Paym         305.00         250.00         0.00         50.00         0.00           15/11/2014         Costs         0.00         0.00         50.00         0.00         50.00		Original Debt			17,000	.00 Debt Inte	rest			157.76	
Date         Method         Type         Value         Premium Paid         Costs         Costs         Paid         Interest         Interest         Paid           31/10/2007         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         200.00         200.00         0.00         0.00         0.00         0.00           15/11/2014         Interest         0.00         0.00         0.00         96.05         0.00           15/11/2014         Interest         0.00         250.00         0.00         50.00         5.00           15/11/2014         Cheque         Direct Paym         305.00         250.00         0.00         50.00         0.00         5.00           15/11/2014         Costs         0.00         0.00         50.00         0.00         0.00         0.00         0.00		Recoverable Costs			600	.00 Collected	to Date			705.00	
31/10/2007         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         200.00         200.00         0.00         0.00         0.00           15/11/2014         Interest         0.00         0.00         0.00         96.05         0.00           15/11/2014         Interest         0.00         250.00         0.00         50.00         5.00           15/11/2014         Cheque         Direct Paym         305.00         250.00         0.00         50.00         5.00           15/11/2014         Cheque         Direct Paym         305.00         250.00         0.00         50.00         5.00           15/11/2014         Cheque         Direct Paym         305.00         250.00         0.00         50.00         0.00         5.00						Outstand	ing			17,052.76	
14/10/2009         Cheque         Receipt         100.00         100.00         0.00         0.00         0.00           14/10/2009         Cheque         Receipt         200.00         200.00         0.00         0.00         0.00           15/11/2014         Interest         0.00         0.00         0.00         61.71         0.00           15/11/2014         Interest         0.00         0.00         0.00         96.05         0.00           15/11/2014         Cheque         Direct Paym         305.00         250.00         0.00         50.00         5.00           15/11/2014         Costs         0.00         0.00         50.00         0.00         0.00         5.00		Date	Method	Туре	Value	Premium Paid	Costs	Costs Paid	Interest	Interest Paid	
14/10/2009         Cheque         Receipt         200.00         200.00         0.00         0.00         0.00         0.00           15/11/2014         Interest         0.00         0.00         0.00         0.00         61.71         0.00           15/11/2014         Interest         0.00         0.00         0.00         96.05         0.00           15/11/2014         Interest         0.00         250.00         0.00         50.00         5.00           15/11/2014         Cheque         Direct Paymi         305.00         250.00         0.00         50.00         5.00           15/11/2014         Costs         0.00         0.00         50.00         0.00         0.00         5.00		31/10/2007	Cheque	Receipt	100.00	100.00	0.00	0.00	0.00	0.00	
15/11/2014         Interest         0.00         0.00         0.00         61.71         0.00           15/11/2014         Interest         0.00         0.00         0.00         96.05         0.00           15/11/2014         Interest         0.00         250.00         0.00         50.00         5.00           15/11/2014         Cheque         Direct Payminia         305.00         250.00         0.00         50.00         5.00           15/11/2014         Costs         0.00         0.00         500.00         0.00         0.00		14/10/2009	Cheque	Receipt	100.00	100.00	0.00	0.00	0.00	0.00	
15/11/2014         Interest         0.00         0.00         0.00         96.05         0.00           15/11/2014         Cheque         Direct Paym         305.00         250.00         0.00         50.00         5.00           15/11/2014         Costs         0.00         0.00         50.00         0.00         0.00         5.00		14/10/2009	Cheque	Receipt	200.00	200.00	0.00	0.00	0.00	0.00	
15/11/2014         Cheque         Direct Paym         305.00         250.00         0.00         50.00         0.00         5.00           15/11/2014         Costs         0.00         0.00         500.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00         0.00		15/11/2014		Interest	0.00	0.00	0.00	0.00	61.71	0.00	
15/11/2014 Costs 0.00 0.00 500.00 0.00 0.00 0.00		15/11/2014		Interest	0.00	0.00	0.00	0.00	96.05	0.00	
		15/11/2014	Cheque	Direct Paym	305.00	250.00	0.00	50.00	0.00	5.00	
15/11/2014 Costs 0.00 0.00 100.00 0.00 0.00 0.00		15/11/2014		Costs	0.00	0.00	500.00	0.00	0.00	0.00	
		15/11/2014		Costs	0.00	0.00	100.00	0.00	0.00	0.00	

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

### **Chapter 13: The Reserve Ledger**

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

### How to View the Reserve Ledger

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

	P	hone Log	Maintain	Setup Hel	p			*						( comorante	)	
Print																
A Client/Case	Ca	ase: IBSOO	1/0019		International										Te	l: 01-66778
Case Diary					-v- Fitzsimmo	ons Property	Management	plc							F/e	e: SK
Document Manager																۱ <u>.</u>
S Current Client Details														Add	Edit	Delete
Surrent Case Details			General	Special	Future	Property	Other	Contributory	Co Defendant	Costs	General Comment	Special Comment	Furture Comment	Property Comment	Other Commer	
Other Case Details			Damages	Damages	Specials	Damage	Damages	Negligence	Liability							Comn
坐 Associates	Þ	16 Nov 2	6,000.00	1,000.00	2,000.00	0.00	0.00	2,000.00	1,000.00	4,000.00	Damaged Leg, fr	Pain & Suffering	Long term rehab			Didn't
Critical Information	Γ															
A/c Ledger																
Time Ledger Debt Ledger																
Reserve Ledger																
Undertakings																
														G		
E Strong Room														18		

### 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 Led	lger – Insert 🗙 🗙
Matter IBS001/0019	International Business Services	Ltd Date 16 Nov 2014
General Damage	6,000.00	Damaged Leg, fractured.
Special Damages	1,000.00	Pain & Suffering
Future Specials	2,000.00	Long term rehab
Property Damage	0.00	Enter the property damage comments
Other Damage	0.00	Enter the other damage comments
Damages Total	9,000.00	
Contributory Negligence	2,000.00	Didn't wear protective shield.
Co Defendant Liability	1,000.00	Enter the co defendant liability comments
Reserve Total	6,000.00	
Costs	4,000.00	Enter the Costs comments
Estimate Total	10,000.00	
		Ok Cancel

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

General Damages Special Damages Future Specials Property Damage Other Damage

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

Contributory Negligence Co Defendant Liability

Finally, input an estimate of the Costs.

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

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

### How to Edit an Entry

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

### How to delete an Entry

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



### How to Print the Reserve Ledger

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

### **Chapter 14: Phone Log**

### Viewing, Searching and Sorting the Phone Log

#### How to view the Phone Log

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

	8						
one Log Add Edit Phone Log	Delete						
Search/Open	Search						Standard Vi
All Matters		Case Code	Date	Name	Who	Message	Description
Recent Matters		KEL002/0002	21 May 2014	Sarah Kelly	CN	Caller: Louise - Pls call urgent	Debt Collection
My Contacts		FIS001/0001	12 Dec 2013	Melinda Fisher	CN	Caller: Melinda - Please ring back re contracts	Sale of Lands in Wicklow
Advanced Search		BLO001/0005	11 Dec 2013	Joe Bloggs	BS	Phone Call	Advice File
My Invoices	1	BLA001/0001	11 Dec 2013	Gordon T. Black	CN	Phone call re Brief	RTA Walkinstown Crossroads, G. Black
My Cheques	1	BRO002/0001	22 Oct 2013	Kevin Brophy	CN	Phone Call	Immigration
Phone Log	1	BLO001/0006	30 May 2012	Joe Bloggs	BS	Phone Call to discuss contract	Lease Review (Sports Clinic, Spawell)
Strong Room	1	BLO001/0005	30 May 2012	Joe Bloggs	BS	Phone Call	Advice File
Document Search	1	ABA001/0002	10 May 2012	David Abrahams	BS	Phone Call from David re Garda Report	RTA - Listowel
Template Library	1	LAW001/0001	25 Apr 2012	Liz Lawlor	BS	Phone Call - Advised on title issues	Advice re Inheritance tax
	1	CLI001/0001	20 Apr 2012	Bill Clinton	BS	Phone Call - Looking for Barrister's opinion. pls Call!!!!	Unfair dismissal by State Department
	1	ABA001/0001	20 Apr 2012	David Abrahams	BS	Phone Call to David re Assets Valuation	Family Law
	1	LAW001/0001	28 Feb 2012	Liz Lawlor	BS	Phone Call to advise on Tax plan	Advice re Inheritance tax
	1			www.loe.Bhaqs	PC .	Phone Call	mådrice File

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.



3



#### How to Filter the Phone Log

- 1. Open the Phone Log
- 2. To filter move you mouse over the column heading until a pin appears.
- 3. Click on the pin to see a list of filter options click on the required filter.

S	earc	h			$\frown$
			Case Code	Date	Name Who Message
	<b>√</b>		HSE001/0003	25 May 2011	Housing the notes in here so you
	<b>√</b>		HSE001/0001	30 Jun 2011	(Blanks) Housin (Non blanks)
	<b>√</b>		GAL002/0003	14 Feb 2014	Galact
	<b>«</b>		ABA001/0001	26 Oct 2011	David Bart Simpson da - More instructions - d
	$\checkmark$		ABA001/0001	16 Aug 2012	David Bill Clinton all re Means Assessment
	$\checkmark$		ABA001/0001	15 Nov 2012	David Bob Murphy d Client on Court process
	$\checkmark$		ABA001/0001	18 Dec 2012	David Charlie Gleeson David Abrahams g for advice tax implication
	$\checkmark$	1	GLE001/0001	05 Oct 2011	Charlie Galactic MacroCredit Home Loans Limited
Þ	$\checkmark$		MUR002/0001	28 Aug 2012	Bob N Housing Department lanning
	<b>«</b>		CLI001/0001	22 Mar 2011	Bill Cli Jenny Rafter ent to approve filing Defe
	<b>«</b>		CLI001/0001	07 Feb 2013	Bill Cli Ken Traynor y to worry about. Everythi
	$\checkmark$		SIM001/0001	12 Feb 2010	Bart Simpson CN Telephone Attendance

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	Date	Name	Message	Description				
	► Who	B	s								
F	▶ Who: CN										
	∠ Who: JP										
	1		SMI001/0001	20 Jan 2011	Smith & Green	Caller: john smith - harry rang re contracts	Corporate Matters				
	1	2	BOU001/0001	24 Oct 2010	Claire Bourke	Telephone Attendance	Personal Injury at work				
	1		BOU001/0001	17 Jul 2010	Claire Bourke	Telephone Attendance	Personal Injury at work				
	► Who	M	IW								
Τ	► Who:	S	к								

- 4. To remove the grouping, if the Group Panel is hidden, right-click on a colum 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.

	Name ⁹ Group	Panel						
	Case Code	Date	Message					
Þ	▶ Name:							
	► Name: Bart Sin	npson						
	► Name: Bill Clin	ton						
	▶ Name: Bob Mu	rphy						
	► Name: Charlie	Gleeson						
	▶ Name: David A	brahams						
	► Name: Galactic	MacroCredit	Home Loans Limited					
	► Name: Housing	g Department						

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

### How to add a phone message

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

	Add Phone Log	×
Case	ZZZZZZ/ZZZZ	ς,
Date	16 Nov 2014 💙 11:36	
Priority	○ High  ● Normal  ○ Low	
Who	Select who	
Notify	Please Select Group	
Caller	Enter the Caller Answered	
Message		
	I	
	-	
	Send Email Ok Ok	Cancel

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

- Case Code By default this will be ZZZZZZ/ZZZZ, which is used for messages that are not connected with a case. To select a case click on the browse button and search for the required case.
- Date/Time This will show the current date and time; amend if required.

Priority	Select the priority of the message (HIgh, Normal or Low).
Who	Who is the message for. You may select from the drop-down list.
Notify	To notify somebody else, in addition to the addressee of the message, select from the drop-down list.
Caller	Input the caller's name.
Message	Input the message.
Answered	<b>Check</b> this box only when the message has been answered; when it is checked, the message will not appear in the addressee's task list.

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

### How to edit a phone message

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

	Change Phone Log (1880) X
Case	KEL002/0002 Sarah Kelly Debt Collection
Date	21 May 2014 🔽 14:41
Priority	○ High
Who	Carol Nolan
Notify	Please Select Group
Caller	Louise Answered
Message	
Caller: Lou - <u>Pls</u> call u	rgent
	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 15: Closed Cases**

### How to Search for Closed Cases

- 1. Click on Search/Open on the Navigation panel.
- 2. Select All Matters on the Navigation panel.
- 3. Click the **View** icon on the right of the window. The Standard View is shown by default.

	Standard View
View	
	View

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

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

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

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

### How to Reopen a closed case

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

Client Code		IBS001	Description	Gary Nevi
Matter		0020		
Matter Admin		Case Associate	Other Details	Archive
Closed E	Date: 16 N	ov 2014 🗹 Closed	ł	

### 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.

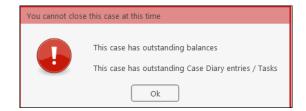
- 1. Click on Search/Open on the Navigation panel.
- 2. Select All Matters on the Navigation panel.
- 3. Search for the case in the normal way.
- 4. **Double click** to open in the Case Diary.
- 5. Click on **Current Case Details** on the Navigation panel, to view the Current Case Details screen.

0				Current	t Case Details				
Clier	nt Code	IBS001	Description	Gary Nev	ville - Short term	loan			
Matter		0020							
Matter	Admin	Case Associate	Other Details	Archive	Billing Details	Permission	Transaction		
Fee Ear	rner	Brian Sweeney	1	~	File Ref	Enter File	Ref		
Secreta	iry	Select Secretary	1	~		Enter			
Partner		Select Partner		~	Vour reference	Enter Enter Your Reference			
Departi	ment	Debt		~					
Work ty	ype					Mark as	Important		
Old ref	erence	Enter Old Refer	ence		]	Statem	ent		
Case F	Plan and S	tatus							
Case	Plan/Type	General Office \	Work	~	File colour	Select File	Colour		~
Case status				~	Record No		Enter Record No		
							ſ	Ok	Cancel

- 6. Select the Archive Tab.
- 7. Check the box marked **Closed**.

	) Current Case Details									
Clier	nt Code	IBS001	Description	Ger Brad	y - MNBA Visa C	NBA Visa Credit				
Matt	Matter 0022									
Matter	Admin	Case Associate	Other Details	Archive	Billing Details	Permission	Transaction	]		
		Case Associate	Other Details	Archive	Billing Details	Permission	Transaction			
Close	d									

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



#### Or

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



### Chapter 16: Using the Document Manager and Brief Wizard

### **Document Manager**

#### **Getting around Document Manager**

Below is an image of the Document manager window.

	/	Toolbar							
Home Case Repor	ts Phone Log Maintain Help								
Print Properties Reclass		Viewer Case Bo	x						Preview Pane
🔦 Client/Case	Case: BIL001/0001			Column H	Headings				Tel: 0128 F/e: BS
🚺 Document Manager	Search 🛛	Search text					Standard	View 📃	Attendance shee
Current Client Details	Type Document Name	Version Diar	/ Date Date *	Document Class	Source	From	То	Subjec	
Gurrent Case Details Other Case Details	Attendance sheet	1 12 N	lov 2014 23 Nov 2014	General	Case			Attenc ^	ATTENDANCE
Associates	Letter to Barrister	1 13 N	lov 2014 23 Nov 2014	L .	Case			Letter	Oliverty New Diller
Critical Information	Letter to insurance company	1 08 0	ct 2014 23 Nov 2014	Letters/Interparty Corr	Case			Letter	Client: Noel Billing
-	Letter to Doctor	1 23 N	lov 2014 01 Oct 2014	Letters/Internarty Corr	Cace			Letter	Case Reference
A/c Ledger	insurance assessors report	1 04 J	ul 2011 04 J	De autore e at 1 in	-m	Martina Winte	martina@keyh	doctor	BIL001/0001/BS/hb
Time Ledger		1 04 J	1 2011	Document Lis	5T -m	Martina Winte	martina@keyh	doctor	Description: RTA
Debt Ledger	Navigation panel		л 2011 04 Jul 2011	General	Received E-m	Martina Winte	martina@keyh	doctor	Brennanstown Valley
Reserve Ledger		1 10 J	un 2010 29 Jan 2011	Letters/Interparty Corr	Case			Letter	Roundabout
Undertakings	Letter to Solicitor	1 24 A	pr 2010 29 Jan 2011	Letters/Interparty Corr	Case			Letter	Date: 23 November 2014
	Letter to Client	1 20 A	pr 2010 29 Jan 2011	Letters/Interparty Corr	Case			Letter	Date. 20 November 2014
Strong Room	Attendance Sheet	1 17 A	pr 2010 29 Jan 2011		Case			Initial /	

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						
	Show document properties						
Properties	Reclassify: change the the document class						
Reclassify	Click to email current document						
Email	Compile Brief: If no Brief currently exists, this button launches the <b>Brief Wizard</b> .						
Compile Brief	If there is an existing Brief, this button opens the existing Brief in the <b>Brief</b> Maintenance window						
Use Adobe PDF Viewer	Tick to use Adobe Reader to preview document.						
	Compare two documents using Word's Document Compare feature						
MS Word	Compare two documents using WorkShare (if installed)						

#### How to search the document manager

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

=	1 💑													
Print	Properties Reclassify Document(s)	Email	Compile Brief Brief	Preview	S Word Worksh Compare	are								
Client/		Case:	BLA001/000	1 Gordon T. Blac RTA Walkinstov		G. Black						Tel: 01 F/e: BS		
Docum	ent Manager	💲 Sei	Search Standard View 📻 Letter to Client											
	Client Details	Туре	e Document N	lame	Version	Diary Date	Date 💌	Document Class	Source	From	То	Gordon T. Black		
Scurrent Case Details  Other Case Details		E	Letter to Do					Letters/Interparty Corr			^	23 Ellis Park,		
🐣 Associate	tes Information		Letter to Do					Letters/Interparty Corr				Rathmines, Dublin 6		
Critical			Letter to So					Letters/Interparty Corr Letters/Interparty Corr				Duomi o.		
A/c Led	lger	Ē	Letter to Jol					Letters/Interparty Corr						
Time Le	edger	•	Letter to Cli	ent	1	04 Nov 2014	04 Nov 2014		Case					
Debt Le	ve Ledger	F	Letter to Cli	ent	1	04 Nov 2014	04 Nov 2014		Case			OUR REF YOUR REF DATE		
		F	Contracts ve	ersion 2	1	04 Jun 2014	10 Dec 2013	Document	Received E-m			BS.hb.BLA001/0001 1234T 04 November 2014		
) Underta		2	Tips for usir	ng Gmail	1	14 Nov 2013	09 Dec 2013	General	Received E-m	mail-noreply	Keyho			
	_		Microsoft O	utlook Test Message	1	14 Nov 2013	09 Dec 2013	General	Received E-m	training.keyho	Trainir	Re: RTA Walkinstown Crossroads, G. Black		
Strong	Room		image001		1	27 Nov 2013	09 Dec 2013	General	Received E-m	melinda@key	Trainir			
			Gordon T. B	lack RTA Walkinstown Crossroads,	G 1	27 Nov 2013	09 Dec 2013	General	Received E-m	melinda@key	Trainir	Dear Mr Black		
		<b>1</b>	keyhouse		1	12 Dec 2013	05 Dec 2013	Letters/Interparty Corr	Captured					
			2009082019	1608sharpscanner@keyhouse.ie_2	00 1	11 Dec 2013	05 Dec 2013	Document	Captured			Yours sincerely.		
			Benefits of v	vorking paperless	1	28 May 2014	05 Dec 2013	Document	Captured			rous succes,		
			Brief_Gordo	n T Black RTA Walkinstown Crossr	oa 1	11 Dec 2013	11 Apr 2013	General	Captured					
		R	Brief_RTA W	alkinstown Crossroads_ G. Black_1	1	11 Dec 2013	11 Apr 2013	General	Captured			Brian Swegngy		

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

Client/Case	Case: BLA001/0001 Ground T. Black RTA Walkinstown Crossroads. G. Black												
Case Diary		_											
じ Document Manager	6	pleading Standard View											
🗞 Current Client Details		-							-	-			
🖲 Current Case Details		Type	Document Name	Version	Diary Date	Date 🔻	Document Class	Source	From	То			
Other Case Details	►	2	RE: Draft Pleadi	1	20 Apr 2012	20 Apr 2012	Document	Sent E-mail	Martina Winte				
Associates		æ	blac01-0001	1	25 Apr 2012	17 Apr 2012	Memo	Received E-m	Martina Winte	'Mart			
Critical Information		-	Draft <mark>Pleading</mark> s	1	25 Apr 2012	17 Apr 2012	Document	Received E-m	Martina Winte	'Mart			
		P	blac01-0001	1	22 Nov 2011	22 Nov 2011	Document	Received E-m	Martina Winte	marti			
m	L.	P		human	- marrow	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	man man		www.	marti			

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

Sort Ascending

₹↓ Sort Descending **2**¥ Clear Sorting

Group By This Column Here Show Group Panel 🛅 Show Column Chooser

Best Fit (all columns)

Filter Editor..

Document Class ?

2

Ŷ

Best Fit

# How to Sort by Column Heading

4. 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.

C	ase:	ase: BIL001/0001 () Noel Billing RTA Brennanstown Valley Roundabout										
5	Search 😒 🗹 Search text Standard View 🗖											
	Туре	Document Name	Version	Diary Date	Date	Document Class	Source	From	То	Subjec		
Þ	F	Attendance Sheet	1	17 Apr 2010	29 Jan 2011	Attendance Sheet	Case			Initial , ^		
	P	Attendance sheet		12 Nov 2014	23 Nov 2014	Attendance Sheet	Case			Attenc		
	P	Letter to Client		20 Apr 2010	29 Jan 2011	Letters/Interparty Corr	Case			Letter		
	P	Letter to Solicitor	1	24 Apr 2010	29 Jan 2011	Letters/Interparty Corr	Case			Letter		
	P	Letter to Solicitor	1	10 Jun 2010	29 Jan 2011	Letters/Interparty Corr	Case			Letter		
		letter from hospital consultant	1	04 Jul 2011	04 Jul 2011	Letters/Interparty Corr	Received E-m	Martina Winte	martina@keyh	doctor		
	P	Letter to insurance company	1	08 Oct 2014	23 Nov 2014	Letters/Interparty Corr	Case			Letter		
	æ	Letter to Barrister	1	13 Nov 2014	23 Nov 2014	Letters/Interparty Corr	Case			Letter		
	P	Letter to Doctor	1	23 Nov 2014	01 Oct 2014	Letters/Interparty Corr	Case			Letter		
	2	doctors report	1	04 Jul 2011	04 Jul 2011	Medical Reports	Received E-m	Martina Winte	martina@keyh	doctor		
	P	insurance assessors report	1	04 Jul 2011	04 Jul 2011	Medical Reports	Received E-m	Martina Winte	martina@keyh	doctor		

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

# How to Filter Columns

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

5	Search 😔 🗹 Search text Standard View									
	Туре	Document Name	Version	Diary Date	Date	bocament class		From	То	Subje
F	P	Attendance Sheet	1	17 Apr 2010	29 Jan 2011	Attendance Shee (Blanks)				Initial
		Attendance sheet	1	12 Nov 2014	23 Nov 2014	Attendance Shee	ince Sheet			Attend
		Letter to Client	1	20 Apr 2010	29 Jan 2011	Letters/Interpart Letters/	Interparty Corres	oondance		Letter
	P	Letter to Solicitor	1	24 Apr 2010	29 Jan 2011	Letters/Interpart Medica	l Reports			Letter
		Letter to Solicitor	1	10 Jun 2010	29 Jan 2011	Letters/Interparty corr	Case	.:		Letter
		letter from hospital consultant	1	04 Jul 2011	04 Jul 2011	Letters/Interparty Corr	Received E-m	Martina Winte	martina@keyh	docto
		Letter to insurance company	1	08 Oct 2014	23 Nov 2014	Letters/Interparty Corr	Case			Letter
	P	Letter to Barrister	1	13 Nov 2014	23 Nov 2014	Letters/Interparty Corr	Case			Letter
		Letter to Doctor	1	23 Nov 2014	01 Oct 2014	Letters/Interparty Corr	Case			Letter
	2	doctors report	1	04 Jul 2011	04 Jul 2011	Medical Reports	Received E-m	Martina Winte	martina@keyh	docto
		insurance assessors report	1	04 Jul 2011	04 Jul 2011	Medical Reports	Received E-m	Martina Winte	martina@keyh	docto

5. 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

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

Type Document Name Versi
Document Class: Attendance Sheet
Document Class: Letters/Interparty Correspondance
Document Class: Medical Reports



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

	Туре	Document Name	Version	Diary Date	Date	Source	From	То	Subject			
	Document Class: Attendance Sheet											
Þ	∡ Document Class: Letters/Interparty Correspondance											
	(PE	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			
	P	Letter to Doctor	1	23 Nov 2014	01 Oct 2014	Case			Letter to Doctor			
	Document Class: Medical Reports											

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

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

To remove the grouping, rightclick 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.

С	ase: BEE001/0008	Þ	Zaphod Beeblebrox Beeblebrox v Dublin Bus				
5	Search		💛 🗹 Search text				
[	Document Class 🔺 Source		Full Expand	(	Group pan	el	
•	Type Document N Document Class: Clien Document Class: Docu Document Class: Locu Document Class: Instr Document Class: Lette Document Class: Mem Document Class: Metri	2↓ ∠↓ 2* 000	Full Collapse Sort Ascending Clear Sorting Ungroup Hide Group Panel Show Column Chooser		Version	Diary Date	Date
	P Document Class: Motio	Ŷ	Best Fit (all columns) Group Summary Editor Filter Editor				

x

#### How to reclassify documents

1. Select the document or documents you want to reclassify and click **Reclassify** on the Home tab, to bring up a list of the available document categories.

- **TIP:** To select multiple documents: Hold down CTRL on your keyboard and click each of the documents to be selected.
- 2. Search for the required category, if necessary, and select it.

Search Class Cod ATT CFS DOC ENG	le Class De Attendar Conflict Docume	ce Sheet
<ul> <li>ATT</li> <li>CFS</li> <li>DOC</li> </ul>	Attendar Conflict	ce Sheet
CFS DOC	Conflict	
DOC		earch
	Documo	
ENG	Docume	t
	Engager	ent Letters
GEN	General	
LTR	Letters/I	terparty Correspondance
MED	Medical	leports
MEM	Memo	
		Ok Cancel

3. Click OK.

#### How to change the Document Properties

- 1. Select the document or documents whose properties you want to amend.
- 2. Click **Properties** on the Home tab, to show the Document Properties dialogue box.
- 3. You may amend the **Document** Name, Date, Document Class or Type. To change the Document Class,

	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	

select from the drop-down list, which will show the available classes.

4. The properties on the File Information tab are read-only; you may copy the document name and path to the clipboard.

#### How to email Document(s)

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

# The Brief Wizard

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

# Important Steps for preparing your Brief

- 1. Review your documents in the **Document Manager** and ensure the necessary files are classified and the Document Date is correct as it will be in your brief.
- 2. If you cannot view or open a document from the Case Diary or Document Manager screen you will not be able to use this document in your brief.
- 3. Once you begin to generate your Brief you should not use your PC for any other purpose until the brief is completed. Several different programs will be used to generate the brief and running another program is likely to cause disruption to generation of the brief.
- 4. Please review the earlier part of this chapter (Document Manager, particularly p. 138 above) for details on how to rename and reclassify a document.

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

#### **Assembling a Brief**

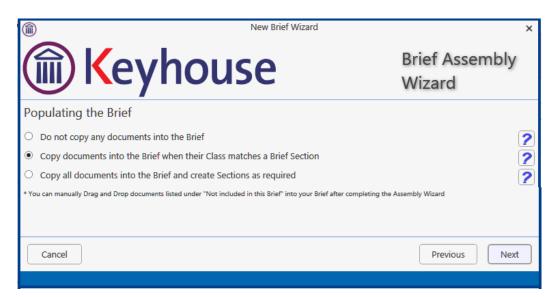
- 1. **Open** a case in the case diary.
- 2. Click Document Manager on the Navigation panel.

Home Case Reports	Phone Log Maintain Setup Help				
Print Properties Reclassify Document(s)	Email Compile Brief Preview MS V	✓ Image: Workshare Compare			
Client/Case	Case: BLA001/0001	Crossroads, G. Black			
🚺 Document Manager	Search				Standard View
Scurrent Client Details	Type Document Name	Version Diary Dat	e Date 🔻 Document Class	Source Fro	om To
Surrent Case Details Other Case Details	Letter to Doctor	1 04 Nov 20	014 04 Nov 2014 Letters/Interparty Corr	Case	
Associates	Letter to Doctor	1 04 Nov 20	014 04 Nov 2014 Letters/Interparty Corr	Case	
Critical Information	Letter to Solicitor	1 04 Nov 20	014 04 Nov 2014 Letters/Interparty Corr	Case	
	Letter to Solicitor	1 04 Nov 20	014 04 Nov 2014 Letters/Interparty Corr	Case	
📓 A/c Ledger	Letter to John Dunne	1 04 Nov 20	014 04 Nov 2014 Letters/Interparty Corr	Case	
🙀 Time Ledger	Letter to Client	1 04 Nov 20	014 04 Nov 2014	Case	
🖉 Debt Ledger	Letter to Client	1 04 Nov 20	014 04 Nov 2014	Case	
📓 Reserve Ledger	Contracts version 2	1 04 Jun 20	14 10 Dec 2013 Document	Received E-m	
🕛 Undertakings	Tips for using Gmail	1 14 Nov 20	013 09 Dec 2013 General	Received E-m ma	il-noreply Keyho
	Microsoft Outlook Test Message	1 14 Nov 20	013 09 Dec 2013 General	Received E-m tra	ining.keyho Trainir
Strong Room	image001	1 27 Nov 20	013 09 Dec 2013 General	Received E-m me	linda@key Trainir
	Gordon T. Black RTA Walkinstown Crossroads, G.	1 27 Nov 20	013 09 Dec 2013 General	Received E-m me	linda@key Trainir
	keyhouse	1 12 Dec 20	13 05 Dec 2013 Letters/Interparty Corr	Captured	
	20090820191608sharpscanner@keyhouse.ie_200.	. 1 11 Dec 20	13 05 Dec 2013 Document	Captured	

- 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 Brie	ef Wizard		x
Keyhouse			Brief Assembly Wizard
Using a Brief Template			
Brief Template	Туре	Sequence	Section
Booklet of Title	<u>L</u>	-1	Interparty Correspondance
Personal Injury Litigation	L.	3	Pleadings
	L.	4	Reports
Do not use a Brief Template	٢		>
Cancel			Previous Next

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



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

 ${}^{\forall}$  **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
Read	y 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	
Ca	ncel	Previous Finish

#### 7. When you are satisfied, click **Finish**.

8. The sections in the brief will be displayed.

	the Discourse Militain Cather Mile							
Home Case Repor	rts Phone Log Maintain Setup Help							
Use Adobe PDF Viewer Show Preview	■ Stay in original section Stay in original section More Up More Doen More Doen							
Preview	Drag and Drop Brief Sections Move Brief Templates This Brief							
Client/Case Case Diary	Case: BIL001,0001 The milling RTA Brennanstown Valley Roundabout							
💋 Document Manager	Brief: Brief for RTA Brennanstown Valley Roundabout	Brief Sections						
🚴 Current Client Details 🌭 Current Case Details	Search							
🎒 Other Case Details	Type Document Name D	ocument D						
Associates	> > Section: 001 - Attendance Sheet	^						
Critical Information	Section: 002 - Letters/Interparty Correspondance							
📓 A/c Ledger	Section: 003 - Medical Reports							
🗿 Time Ledger								
🙀 Debt Ledger								
👪 Reserve Ledger								
Undertakings								
Strong Room								

# **Brief Home tab**

The Home tab in the Brief:



Brief Section

Cancel

Ok

×

# **Brief Sections**

#### How to Add a Section

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

#### How to amend a Section Name

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

Case: B	EE001/0008	• • •	Zaphod Beeblebrox Beeblebrox v Dublin Bus			
						-
Brief: Brief	for Beeblebro	k v Dublin Bu	IS		Brief Section	ons
Search						
Туре	Document N	ame		Class	Document	
► Sec	tion: 001 - Clie	ent Letters				^
► Sec	tion: 002 - Do	cuments				
► Sec	tion: 003 - Eng	gagement Le	tters			
► Sec	tion: 004 - Ins	truction Shee	ets			
► Sec	tion: 005 - Let	ters/Interpar	ty Correspondance			
► Sec	tion: 006 - Me	mo				
► Sec	tion: 007 - Mo	tion papers				

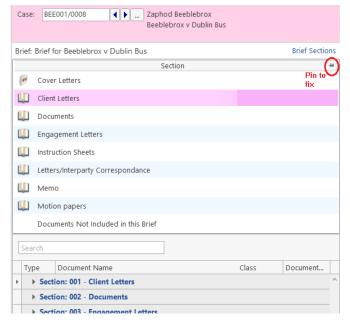
Î

Section Name (New Section)

2. A list of sections will be expanded.

🖑 Tip: To Show the list permanently click the pin.

- 3. Select the section you want to rename.
- 4. Click Name on the Home tab. Alternatively, right-click the section and choose Section Name from the pop-up menu.
- 5. Name the new section and click **OK** to confirm.





#### How to delete a Section

- 1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 143 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.

# Are you sure you want to delete Section "Cover Sheet"?

lete Brief

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



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

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

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

Move the selected section **to the bottom** of the list.

### How to Move a document to a different section

- 1. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 143 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.

	Section		4	
۲	Cover Letters			
Ú.	Client Letters			
U)	Documents			
	Engagement Letters			
	Instruction Sheets			
Ú.	Letters/Interparty Correspondance			
Ú)	Memo			
Ú.	Motion papers			
	Documents Not Included in this Brief			
Sea	ch			
560				
Ту	e Document Name	Class	Document	
	Section: 001 - Client Letters			
	Section: 002 - Documents			
▶ .	Section: 003 - Engagement Letters			
	Terms of Engagement	Engageme	30 Sep 2014	
	Section: 004 - Instruction Sheets			
	Section: 005 - Letters/Interparty Correspondance			
	· · · · · · · · · · · · · · · · · · ·			

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

# How to flag as a Cover or Main

- 5. Click **Brief Sections** on the right of the brief screen (see How to amend a Section Name, p. 143 above)
- 1. Select the section required.
- 2. If the section is already designated as a *Cover* section, Click Make Main on the Home tab to make it a Main section. This command toggles between



Make Main and Make Cover, depending on how the selected section is designated.

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

# **Brief Options**

#### Save current Brief as Template

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

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

By default, the template title will be the same as the title of the Brief on which it is based. As it is to be used as a template, it may be advisable to change it to something more generic.

3. Click **OK**.

# How to Open a Brief

- 1. **Open** a case in the case diary.
- 2. Then click **Document Manager** on the Navigation panel to view the Document Manager.
- 3. Click **Compile Brief** on the Home tab in **Document Manager**. The **Select Brief** screen will appear.

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

- 4. Select the brief to open and click **Open Brief**.
  - Note if you are already working in the brief screen, you may click **Open Brief** on the Home tab.

# **Generate the Brief**

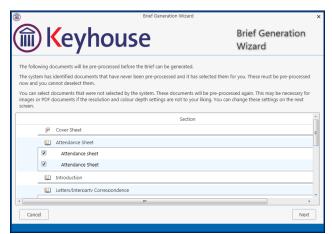
Before you generate the Brief, if you have any Microsoft Office applications running (e.g. Word, Excel, Powerpoint etc), save your work and close the application(s). FAILURE TO DO THIS MAY RESULT IN LOSS OF DATA.

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

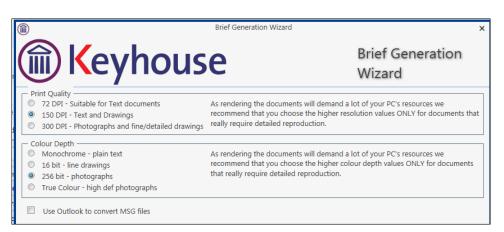
# How to (Re) Generate a Brief

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

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



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



Check the box to use Outlook to convert MSG files.

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



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

Brief Generation Wizard	×
Keyhouse	Brief Generation Wizard
Print Order	you to override the order in which documents appear in the brief.
Page Footer and Table of Content No offset Depending on your PC's printer drivers, the page numbering can sometimes appear too number and other footer information here. Page Numbering Footer Font Size: T Bold NO footer Left-Align TOC columns	far down the page. If that happens adjust the location of the page
Cancel	Previous Next

- 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.
   Print Order
   Order Documents as specified during Brief Maintenance
   Order Documents by File Date in each Section
- The footer offset is the minimum number of lines that must be maintained between the footer and the physical end of the page.
- The options for page numbering in the footer are:
  - *Page*: Only the page number is shown;
  - Section Page: The section number and the page number are shown;
  - Section Desc Page: The section number and description, and the page number are shown.

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

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

Г	Select your Output	
	Produce both a Word and a PDF Document	Select your preferred output.
	Produce a Folder	
	Produce a Word Document	
	Produce a PDF Document	
	Produce both a Word and a PDF Document	



Г	Page Numbering ——	
	Page	N
	Page	- ~
	Section - Page	H
	Section - Desc - Page	- 1

instead of a single document.

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